Supplemental Materials for Group Activities

1. Experiences with Governance, Portfolio, and Project Management (GPPM) (30 minutes)

This group activity will provide an opportunity to reflect and discuss the participant’s experiences with GPPM over the course of their career and at their current institution. This will be facilitated group discussion considering the following questions:

- What works well?
- What are areas for improvement?
- How would you like to see things change?

Space is provided in this outline to take notes, create diagrams, and otherwise capture ideas generated during the session.
2. **Build an IT Governance Model (60 minutes)**

This group activity will provide an opportunity to work through defining the components of an IT governance structure for a topic of interest to the participant.

Space is provided in this outline to take notes, create diagrams, and otherwise capture ideas generated during the session. There will be a discussion with the entire group at the end of the session, but spontaneous discussion among groups or the entire workshop is encouraged.

You will likely not be able to answer all of the questions fully in the time allotted to the exercise. The intention is for you to experience the steps of governance definition and discuss your experiences with your peers. The complete governance definition process is intended as an exercise with other participants back at your home institution.

The steps in this exercise are:

- As a group at your table, walk through the steps consecutively to define the components for an ITG structure you are interested in building. (Taking notes below)
- Work with colleagues to discuss your experiences, challenges, and successes with ITG in these areas after making your own notes in each section.
- There will be a brief discussion with all workshop participants in between questions.

**Briefly answer the following questions:**

1. **Purpose and Scope:** What is it that needs to be governed? What are your institutional priorities?
ii. Participants: Who should participate? Who should advise and who should make decisions? What are the key roles to identify? How are they interconnected?

iii. Decision-making: What decisions are made at the different levels/groups? What resources will be allocated via the process?
iv. **Structure:** What are the layers to the governance structure? How are they interconnected?

v. **Communication and Coordination:** Who will work behind the scenes to facilitate the process?
3 Design the PPMO (45 minutes)

This group activity will provide an opportunity to work through designing a portfolio and project management function within your organization.

Space is provided in this outline to take notes, create diagrams, and otherwise capture ideas generated during the session. There will be a discussion with the entire group at the end of the session, but spontaneous discussion among groups or the entire workshop is encouraged.

You will likely not be able to answer all of the questions fully in the time allotted to the exercise. The intention is for you to think through the main aspects of portfolio management and discuss how you would design something for your unique organization.

The steps in this exercise are:

- Walk through the main functions of portfolio management and consider how they would be configured for your organization. (Taking notes below) (10 minutes)
- Discuss your design with your colleagues. (20 minutes)
- Large group discussion (15 minutes)

Briefly answer the following questions:

i. Facilitate governance: Who will fill the role of portfolio manager? This person will be responsible for facilitating governance and communicating priorities to the organizations that will ultimately be doing the work. (see the Facilitate Governance slides around pages 96-105 of the presentation)

Activities include:
- Help with proposals
- Maintain and enforce process and artifacts
- Establish and maintain quality
- Annual reports
- Coordinate meetings
- Work with committee leads
- Be a liaison
- Prepare meeting materials
- Frame decision points
- Facilitate business case prep
- Maintain membership
- Inform stakeholders of decisions
- Maintain repository of key documentation
- Maintain ITG website(s)
- Facilitate priority setting
ii. Manage resources and schedule: How will resources and scheduling be managed? Will it be centrally controlled or distributed across functional managers? (see slides ~106-~114)

Activities include:
- Work with external stakeholders to prioritize
- Work with internal stakeholders to schedule
- Forecast resource demand and capacity
- Facilitate resource assignment and negotiation
- Facilitate time tracking
- Communicate
iii. Manage the portfolio (monitor and control): Who or what group will report and monitor performance? What group will be empowered to take action when the portfolio or its components require it? (see slides ~115 - ~120)

Activities include:

• Quality control on projects (e.g. monthly reviews with project managers to assess Budget; Schedule; Barriers; Risks and Issues; Overall status; Baseline)
• Identify projects at risk
• Manage stage gate process
• Report on project and portfolio performance
• Communicate
iv. Project management excellence: How will you ensure project management excellence? Do you implement a supportive, controlling, or directive PMO model? What services would you implement to ensure quality project management? (see slides ~121 - ~127)

Activities include
- Develop and maintain standards and tools (PMLC, SDLC, Program Management)
- Build PM capacity
- PM responsibilities
- Manage and coordinate the use of a portfolio management and project management tools
Plan your implementation (30 minutes)

This group activity will provide an opportunity to start thinking about the best way to implement portfolio and project management function within your organization.

Space is provided in this outline to take notes, create diagrams, and otherwise capture ideas generated during the session. There will be a discussion with the entire group at the end of the session, but spontaneous discussion among groups or the entire workshop is encouraged.

You will likely not be able to answer all of the questions fully in the time allotted to the exercise. The intention is for you to think through the best approach for implementing a PPMO within your unique organization.

The steps in this exercise are:

- Review the recommended implementation steps for portfolio management below. For each phase, think about the participants and a rough timeline for creating and evaluating your PPMO. (Taking notes below) (10 minutes)
- Discuss your draft plan at the table (10 minutes)
- Large group discussion (10 minutes)

1. **Work:** The first recommended implementation phase consists of understanding the types of work that your organization does, defining what work should be considered a project, creating an inventory of your projects, and assigning owners. (see slides ~132 - ~139).

2. **Portfolio:** The second step is to institute some basic portfolio management processes. This includes introducing a simple project proposal and review cycle, implementing regular reporting, and designing and introducing a prioritization and scheduling process. (see slides ~140 - ~144)

3. **Projects:** The third step is to institute some project management activities by creating a PMO, developing standards, building your PM capacity, and ensuring project management quality. (see slides ~145 - ~154)

4. **Systems:** The fourth step is to select the types of systems you need to support the portfolio management function you have designed and are in the process of implementing. Typical systems include a collaboration system, a portfolio and project management system, and a time tracking and reporting system. (see slides ~155 - ~161)