

# P3 PMUG Update

Project Portfolio Performance (P3)

January 17, 2024



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- ▶ Welcome
- ▶ EIS/P3 Website Update
  - EIS Website Layout
  - P3 Pages and Forms Walkthrough
  - P3 Project Dashboard
- ▶ PPM
  - PPM Screens and User Manual
  - PPM Training
  - PPM PM Guide
- ▶ P3 2023-25 Initiatives in support of EIS Strategic Framework v2.0
  - PPM UX Overview and Update
  - Agency Maturity Assessment
  - Agile Overview and Community of Practice



# EIS/P3 Website Update

- ▶ EIS Website Layout
- ▶ P3 Pages and Forms Walkthrough
- ▶ P3 Project Dashboard

<https://www.oregon.gov/eis/Pages/default.aspx>

## PPM

- ▶ PPM Screens and User Manual
- ▶ PPM Training
- ▶ PPM PM Guide



# Questions?

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# P3 2023-25 Initiatives

PPM UX Overview and Update, Agile Overview and Community of Practice, and AMA



# PPM Modern UX: Migration Overview

The screenshot shows a dashboard titled "Project Tiles" with a dark sidebar on the left containing navigation options: Home, Project Tiles, Projects, Ideas, Investments, Objectives, Pages, Custom Objects, Status Reports, My Workspace, Tasks, To Dos, Hierarchies, Agreements, Roadmaps, and Plans. The main area displays four project tiles:

- Create New Case Management Function...** (P-00001160): Nov 12, 2020. Metrics: Effort Spent (0%), Budget Spent (0%), Next Milestone (Nov 12).
- CRIMEvue Replacement** (P-00000379): Apr 1, 2015 to Jan 31, 2020. Metrics: Effort Spent (0%), Budget Spent (0%), Next Milestone (Jan 31).
- Deepthi Test Idea** (P-00001455): Apr 11, 2023. Metrics: Effort Spent (0%), Budget Spent (0%), Next Milestone (Apr 11).
- Digitize all Parole Board Documents** (P-00001266): Jan 11, 2022 to Jan 12, 2022. Metrics: Effort Spent (0%), Budget Spent (0%), Next Milestone (Jan 12).

The screenshot shows the "CRIMEvue Replacement" project page (P-00000379) with a dark sidebar on the left containing navigation options: Home, Project Tiles, Projects, Ideas, Investments, Objectives, Pages, and Custom Objects. The main area has tabs for Checklists, Task List, To Dos, Documents, Conversations, and Assignments. The "Conversations" tab is active, showing a message from "Laura" with a file attachment "Legal Tools Solution Implementation Project Business Case v0.6.docx".

# PPM Modern UX: *High-level Roadmap*



Obtain funding approval from the Legislature

**2023-25 LAB –  
June 2023**



Assessment of what it will take to migrate (tasks and level of effort)

**Migration Assessment –  
December 2023**



Implement the modern UX

**UX Migration –  
FY 2024 - 2025**

**Admission to EIS Portfolio –  
January 2023**

POP project business case and charter and submit intake form for inclusion in the EIS Portfolio



**Staffing –  
September 2023**

PM assignment  
BA assignment WIP



**Procurement –  
June 2024**

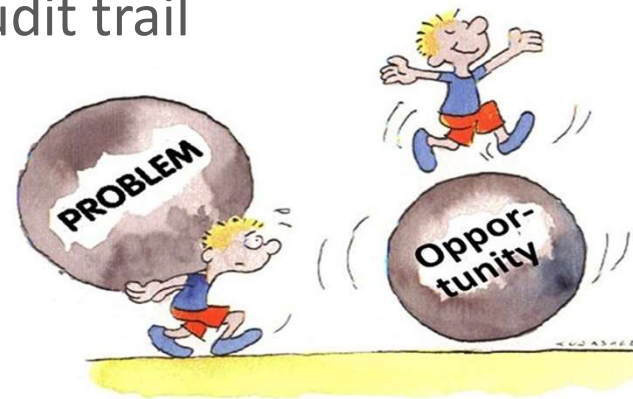
Negotiate and execute professional services contract with PPM tool migration vendor



# PPM Modern UX: *Current Challenges*

## Classic PPM Shortcomings and Challenges

- ▶ Limited KPIs and dashboards
- ▶ Inefficient communication and collaboration
- ▶ Unauthorized alteration of approvals and required conditions
- ▶ Artifact deletion and lack of audit trail
- ▶ Limited workflow





# PPM Modern UX: *Assessment*

**Purpose:** Preparation for migration to the Modern UX

## Steps:

- ▶ Determine impacts
- ▶ Identify opportunities to relieve pain points
- ▶ Determine architectural changes

## Deliverables:

- ▶ Requirements
- ▶ Project plan
- ▶ Best-practice recommendations for migration



## PPM Modern UX: *In Scope*

- ▶ Migration to and configuration of the Modern UX
- ▶ Develop and conduct user training
- ▶ Create system documentation
- ▶ Address artifact deletions and unauthorized data updates
- ▶ Design and configure PPM dashboards/KPIs
- ▶ Improve accessibility and transparency
- ▶ Enhance cross-agency communication and collaboration within PPM



## PPM Modern UX: *Optional Scope*

- ▶ Automated reporting to the transparency website
- ▶ Automated reporting of project indicators
- ▶ Investigate options for including Non-Project Investments
- ▶ More efficient workflows for artifact submission, review, collaboration, and approval
- ▶ Provide the option for agencies to use PPM as their project management tool
- ▶ Investigate integration options with other project management tools



## PPM Modern UX: *Communication*

- ▶ PPM Change Control Board (CCB)
  - Re-establishing CCB with agency representation
  - Input into migration tasks
- ▶ Email regular project updates via PPM user list
- ▶ Modern UX user training



# Questions?

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# Agency Maturity Assessment: Overview

- ▶ Tool to determine level of EIS engagement for IT projects
- ▶ Used along with the Initial Complexity Assessment to determine oversight level
- ▶ Focused on IT governance, project management and oversight experience
- ▶ Input from ASCIO, Senior IT Portfolio Manager and Oversight Analyst
- ▶ Assessed annually and used for all projects submitted the following year

### Initial Complexity Assessment

**EIS Initial Complexity Assessment (ICA)**  
To be completed by agency

Project Name (from IT form) \_\_\_\_\_  
 Agency: \_\_\_\_\_

**Initial Complexity Assessment (ICA)**  
 Span of organizational change \_\_\_\_\_  
 Business complexity \_\_\_\_\_  
 IT complexity \_\_\_\_\_  
 Preliminary budget \_\_\_\_\_  
 Stakeholder complexity \_\_\_\_\_  
 Visibility \_\_\_\_\_

**Initial Complexity Assessment Score**

**Minimum Project Manager Assignment** **Advanced**  
If minimum requirement is not met, indicate planned strategies to address gaps

Additional notes related to project complexity \_\_\_\_\_

### Maturity Assessment

**EIS Agency Maturity Assessment**  
To be completed by EIS

Agency: \_\_\_\_\_  
 Policy Group: \_\_\_\_\_  
 Primary IT Contact: \_\_\_\_\_

**Maturity Assessment**  
 IT Governance: \_\_\_\_\_  
 Note: \_\_\_\_\_

**Project Management Organizational Structure**  
 Note: \_\_\_\_\_

**Oversight Experience**  
 Note: \_\_\_\_\_

**Maturity Assessment Score**

### Oversight Level Assessment

**EIS Oversight Level Assessment (OLA)**  
To be completed by EIS

Project Name (from IT form) \_\_\_\_\_  
 Agency: \_\_\_\_\_  
 Initial Complexity Assessment (from Agency) \_\_\_\_\_  
 Agency Maturity Assessment (from EIS) \_\_\_\_\_  
 Project Score \_\_\_\_\_  
 Recommended Oversight Level: \_\_\_\_\_

**Oversight Level Determination**  
If using an alternate Oversight Level, document reason below:

Complexity/Maturity	Recommended Oversight Levels (Maturity and Complexity)															
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8	Level 9	Level 10	Level 11	Level 12	Level 13	Level 14	Level 15	Level 16
High Maturity - High Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
High Maturity - Medium Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
High Maturity - Low Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Medium Maturity - High Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Medium Maturity - Medium Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Medium Maturity - Low Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Low Maturity - High Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Low Maturity - Medium Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Low Maturity - Low Complexity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16



# Agency Maturity Assessment: 2023 Changes

- ▶ Refined assessment to expand on each of the three focus areas (3 to 8 questions)
- ▶ Adjusted criteria to clarify what we consider in each area (4-point to 5-point scale)
- ▶ Provides feedback on how scores were determined and opportunities for improvement

**ENTERPRISE information services** AGENCY MATURITY ASSESSMENT **2022** Period Ending

Agency Name (insert)

**IT Governance Maturity Assessment (Select)** Score: **2**  
 Managed—Planning and performance measurement take place, although not yet in a standardized way. Or, Initial—Work is completed, but the full goal and intent of the focus area are not yet achieved.

Assessment notes on the agency's key deliverables aligning with the Modernization Playbook

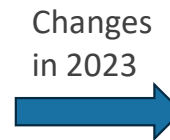
**Portfolio & Project Management Maturity Assessment (Select)** Score: **2**  
 Agency maintains staff with project management skills

Assessment notes on the review of documented agency project and portfolio management processes and organization, and the capability of an agency to achieve outcomes.

**Demonstrated Project Management Experience Assessment (Select)** Score: **2**  
 Agency has successfully completed a level-1 (or Operations and Maintenance) oversight project

Performance notes on the agency recent (3-year) history in successfully executing significant IT projects, and in conformance to oversight processes

**Comprehensive Agency Maturity Assessment Score: 2.0**



**ENTERPRISE information services** AGENCY MATURITY ASSESSMENT

AGENCY: [ ] YEAR ENDING: [ ]

Comprehensive Agency Maturity Assessment Score: **2**

Section	Assessment Definition	Assessment	Comments
<b>SECTION 1: OVERSIGHT AND STRATEGIC ALIGNMENT</b>			
<b>Strong Alignment</b>	Agency has processes for evaluating, selecting, and prioritizing projects to ensure alignment with mission and agency goals and public priorities. This is evidenced by: <ul style="list-style-type: none"> <li>Current agency staff strategic plan</li> <li>Current mission/vision/strategy and agency priorities</li> <li>Agency selection and prioritization process using the established criteria</li> <li>Agency regularly reviews and adjusts criteria to ensure alignment with mission and agency strategies</li> </ul>	2	
<b>Governance Structure</b>	Agency has strategic governance structure, policies, and practices. This is evidenced by: <ul style="list-style-type: none"> <li>Current strategic plan</li> <li>Project selection criteria that align with organizational business and mission</li> <li>Current IT governance charter</li> <li>Agency actively documents and updates</li> <li>Agency regularly reviews and adjusts governance practices to be aligned with evolving technology to meet and business needs</li> </ul>	2	
<b>SECTION 2: PROJECT MANAGEMENT</b>			
<b>Project Leadership</b>	Agency has evidence of strong project ownership and has established a selection process to ensure that expert and qualified agency resources are assigned to project management processes. This is evidenced by: <ul style="list-style-type: none"> <li>Agency creates position</li> <li>Agency role or position description template</li> <li>Agency documents selection process</li> <li>Agency actively documents and updates</li> <li>Agency regularly reviews and adjusts project management processes using lessons learned or other feedback</li> </ul>	2	
<b>Project Management Organization</b>	Agency has a formal Project Management Office or center of excellence that supports standard PMO project management methodology and agency resources to support project management processes. This is evidenced by: <ul style="list-style-type: none"> <li>Org chart showing where the PMO or project office sits within the organization</li> <li>Agency creates position description</li> <li>Project management methodology or process documentation</li> <li>Project plan template</li> <li>Agency actively documents and updates</li> <li>Agency actively reviews and evaluates effectiveness of these practices and processes based on other feedback through stakeholder</li> </ul>	2	
<b>Qualities and Capabilities</b>	Agency has staff with expertise including the project disciplines such as project management, business analysis, organizational change management, and vendor management. This is evidenced by: <ul style="list-style-type: none"> <li>Org chart, HR assessment, certification of staff</li> <li>Agency documents and updates</li> <li>Agency actively reviews and evaluates effectiveness of these practices and processes based on other feedback through stakeholder</li> </ul>	2	
<b>Project Evaluation and Control</b>	Agency applies appropriate project controls and documentation and updates risk and project health throughout the project. This is evidenced by: <ul style="list-style-type: none"> <li>Project management plan templates for risk and issue management, change management, and other organizational policies</li> <li>Agency has established formal or open reporting and communication mechanisms</li> <li>Agency actively documents and updates</li> <li>Agency regularly reviews and evaluates effectiveness of these practices and processes based on other feedback through stakeholder</li> </ul>	2	
<b>SECTION 3: OVERSIGHT EXPERIENCE</b>			
<b>Oversight</b>	Agency has evidence of oversight of projects requiring ongoing oversight (by the level of project) conducted over the past three years. This is evidenced by: <ul style="list-style-type: none"> <li>Agency has evidence of oversight of projects requiring ongoing oversight (by the level of project) conducted over the past three years</li> </ul>	2	
<b>Oversight Evaluation and Control</b>	Agency applies appropriate project controls and documentation and updates risk and project health throughout the project. This is evidenced by: <ul style="list-style-type: none"> <li>Agency creates position description</li> <li>Agency role or position description template</li> <li>Agency documents selection process</li> <li>Agency actively documents and updates</li> <li>Agency regularly reviews and evaluates effectiveness of these practices and processes based on other feedback through stakeholder</li> </ul>	2	



# Questions?

Please contact your policy area SIPM



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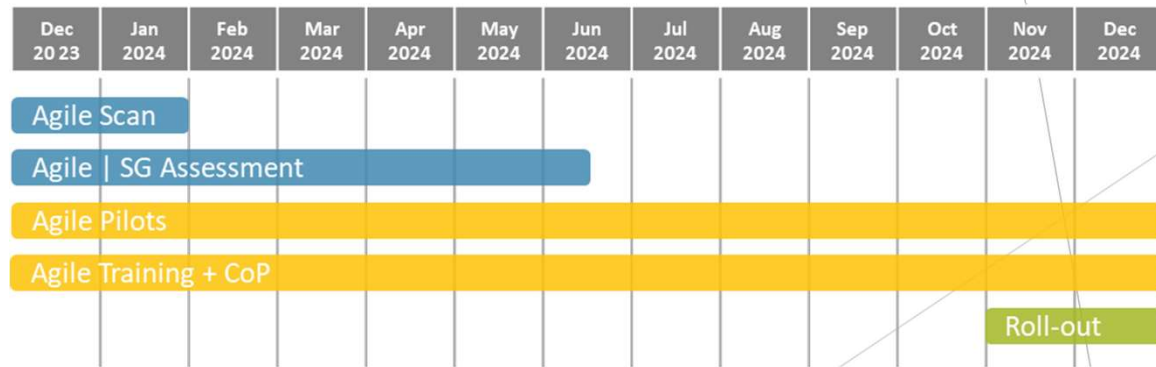


# EIS Agile Oversight: Overview




As part of its [Strategic Framework 2023-2026](#), Enterprise Information Services (EIS) committed to accelerating the adoption of **Agile** practices internally and among our agency partners (*i.e.*, agile mindset, principles, practices, methodologies, and frameworks), by:

- identifying barriers that prevent or the limit the adoption of **Agile**
- **clarifying** oversight engagement for **Agile** initiatives
- aligning with **best practice**
- enabling the acceleration of **value delivery** and
- putting **people** at the center of **digital transformation**



# Agile Defined: *Literally...*

## Ag·ile

/ˈɑːjəl/   
adjective, noun



1. “A term used to describe a mindset of values and principles as set forth in the Agile Manifesto” - *Agile Practice Guide. Project Management Institute (PMI), 2017.*
2. “Agile is a way that you choose to think and act. As agilists, we choose to: i) **Accelerate** our **value realization** by embracing worthwhile changes; ii) Delight customers by taking a **customer-centric** view to our work; iii) Improve group capability by **proactively collaborating** instead of working in functional silos; iv) Improve predictably by refining our understanding of what is needed through regularly **showing our work** and **acting on feedback**; v) **Optimize flow** by working on small things instead of big things. Big things are accomplished incrementally as a series of small things; vi) Keep workloads within capacity by finishing the things we work on instead of starting lots of things. This is called **limiting work in process**; viii) **Improve continuously** by frequently learning from our experience and evolving our practices based on what we learned – “*Disciplined Agile Glossary.*” *Project Management Institute (PMI). <https://www.pmi.org/disciplined-agile/glossary>.*



## Agile Defined: *Agile Myths*

1. **Agile** means “no planning”
2. **Agile** means “no governance”
3. There is no documentation with **Agile**
4. **Agile** practices are new
5. **Agile** only works with small projects
6. **Agile** = Scrum
7. Implementing **Agile** is easy
8. Pure **Agile** is the answer
9. **Agile** is undisciplined
10. **Agile** is for (custom) software development only
11. **Agile** will replace Stage Gate Oversight Model

# Work Stream 1 - Agile Scan: *Status Update*

## What we're doing...

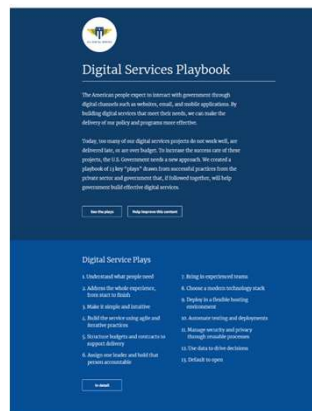
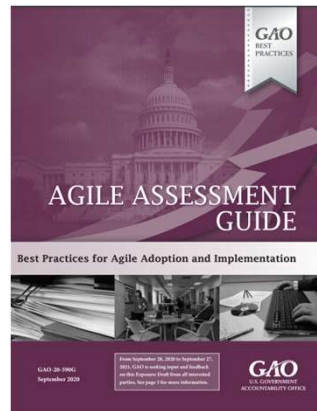
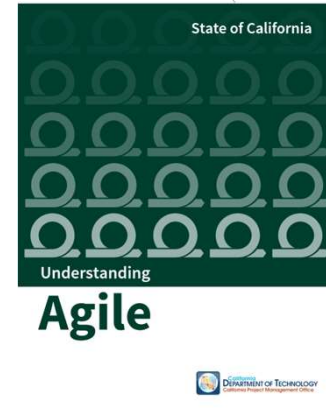
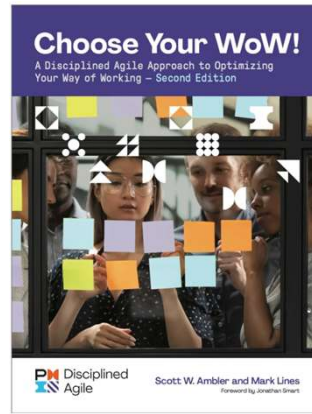
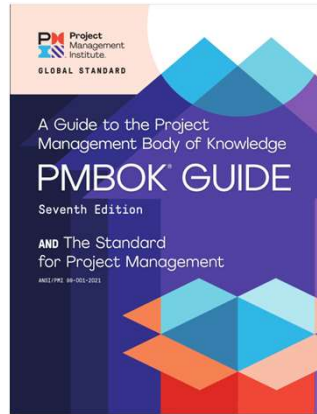
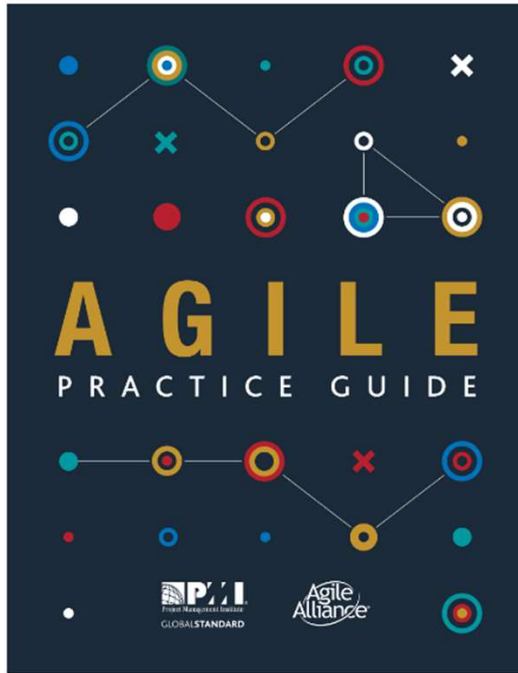
- Literature Review
- Analyst Consultations (Gartner and Info~Tech)
- Agile Glossary
- Communications Planning
- Agile Assessment Survey
- Statewide portfolio assessment (i.e., agile baseline)

## What's next...

- Agency follow-up interviews
- Agency information gathering (e.g., artifacts, SOW, etc...)
- Review and analysis of Agile Assessment Survey and Portfolio Assessment



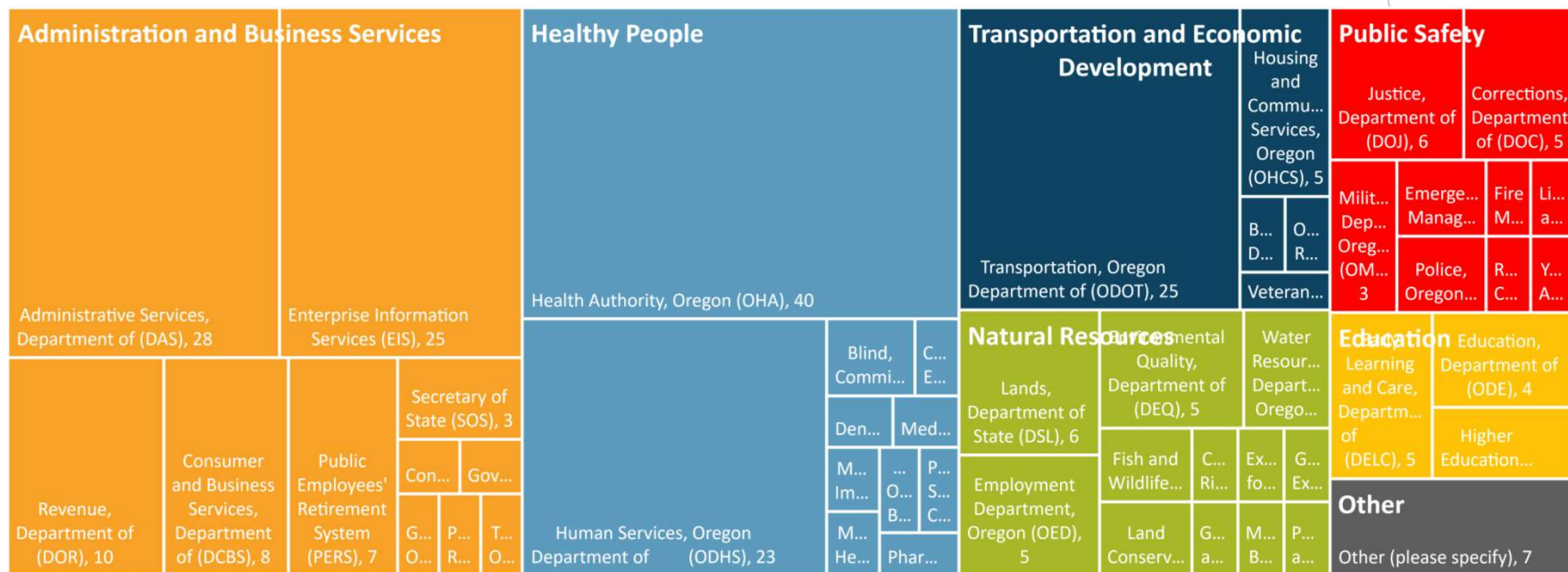
# Work Stream 1 – Agile Scan: Literature Review





# Work Stream 1 – Agile Scan: Assessment Survey

Q1. What agency, board or commission do you work for?

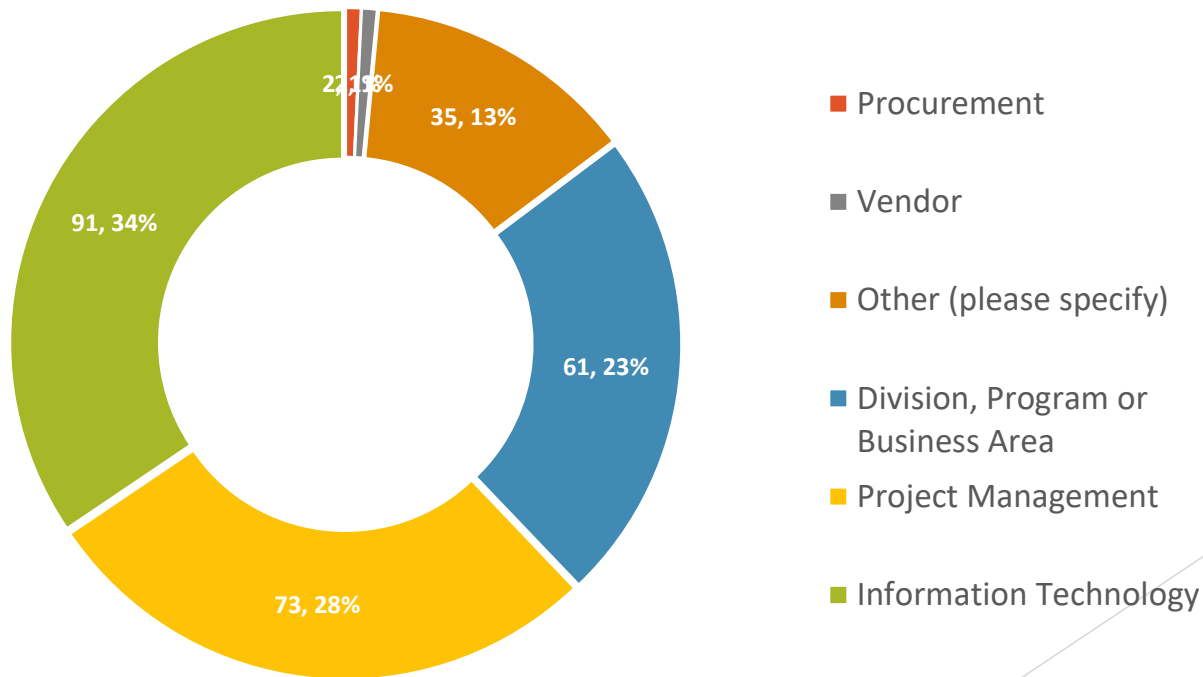


- Other
- Administration and Business Services
- Healthy People
- Natural Resources
- Transportation and Economic Development
- Education
- Public Safety



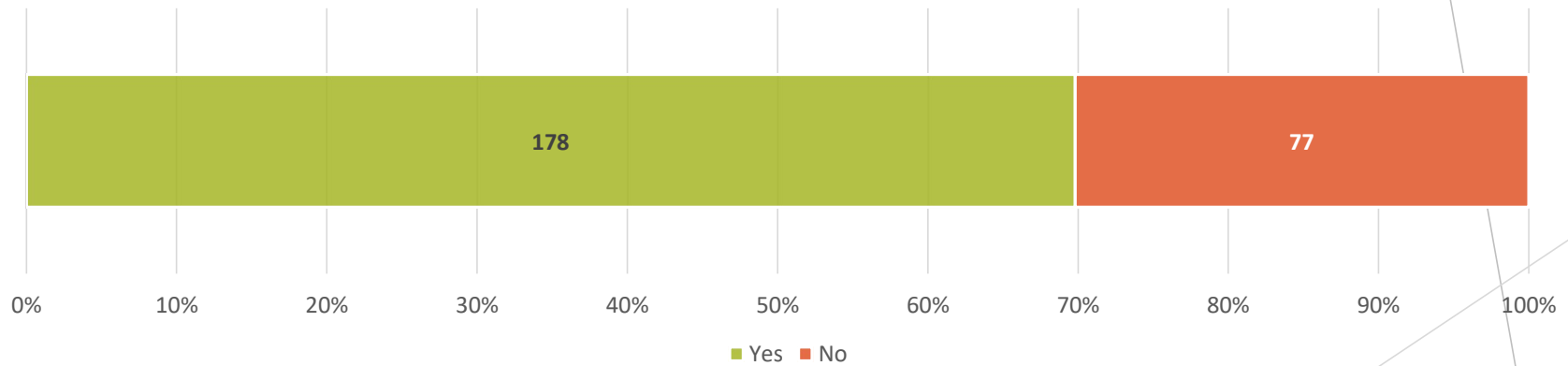
# Work Stream 1 – Agile Scan: Assessment Survey

Q2. What is the functional area of your position?



# Work Stream 1 – Agile Scan: Assessment Survey

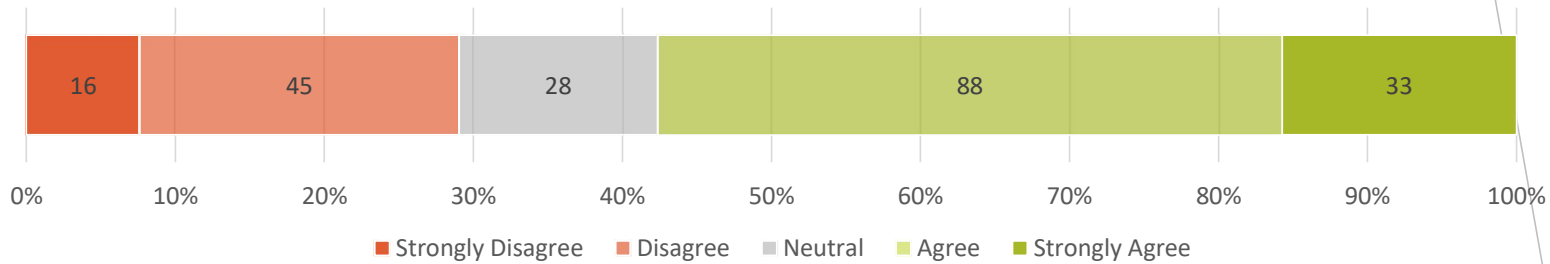
Q3. Would you or someone at your organization be interested in receiving periodic updates on the EIS Agile Oversight initiative, attending EIS-sponsored trainings or workshops, or joining an Agile Community of Practice?



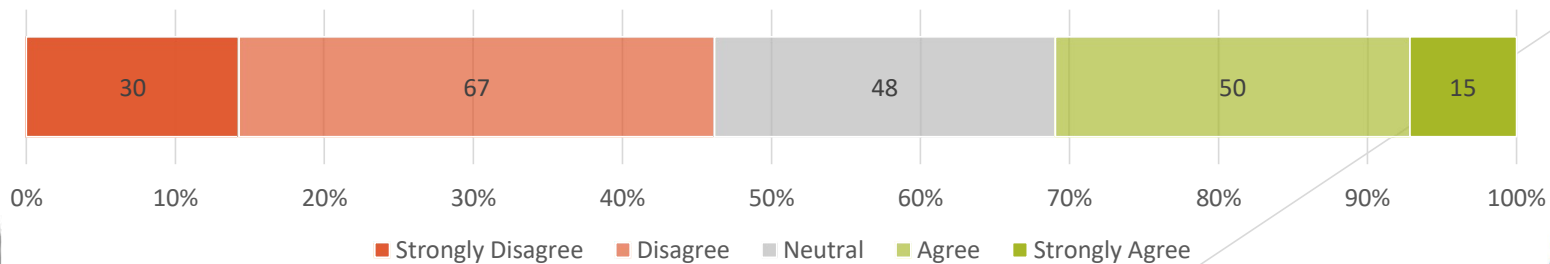


# Work Stream 1 – Agile Scan: Assessment Survey

Q5a. In my organization, we have the right mindset to respond quickly to business needs.

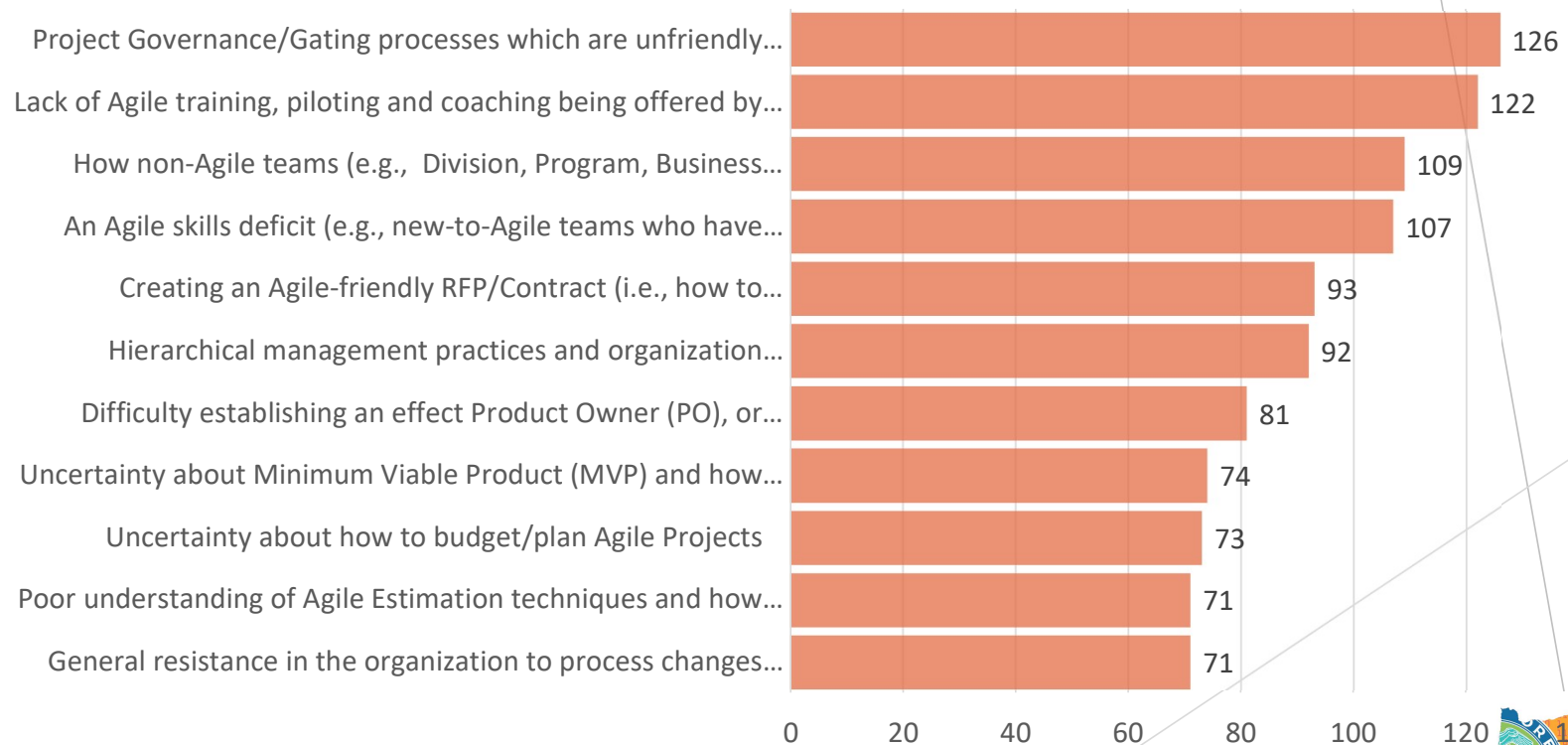


Q5b. In my organization, we have the right tools and processes to respond quickly to business needs.



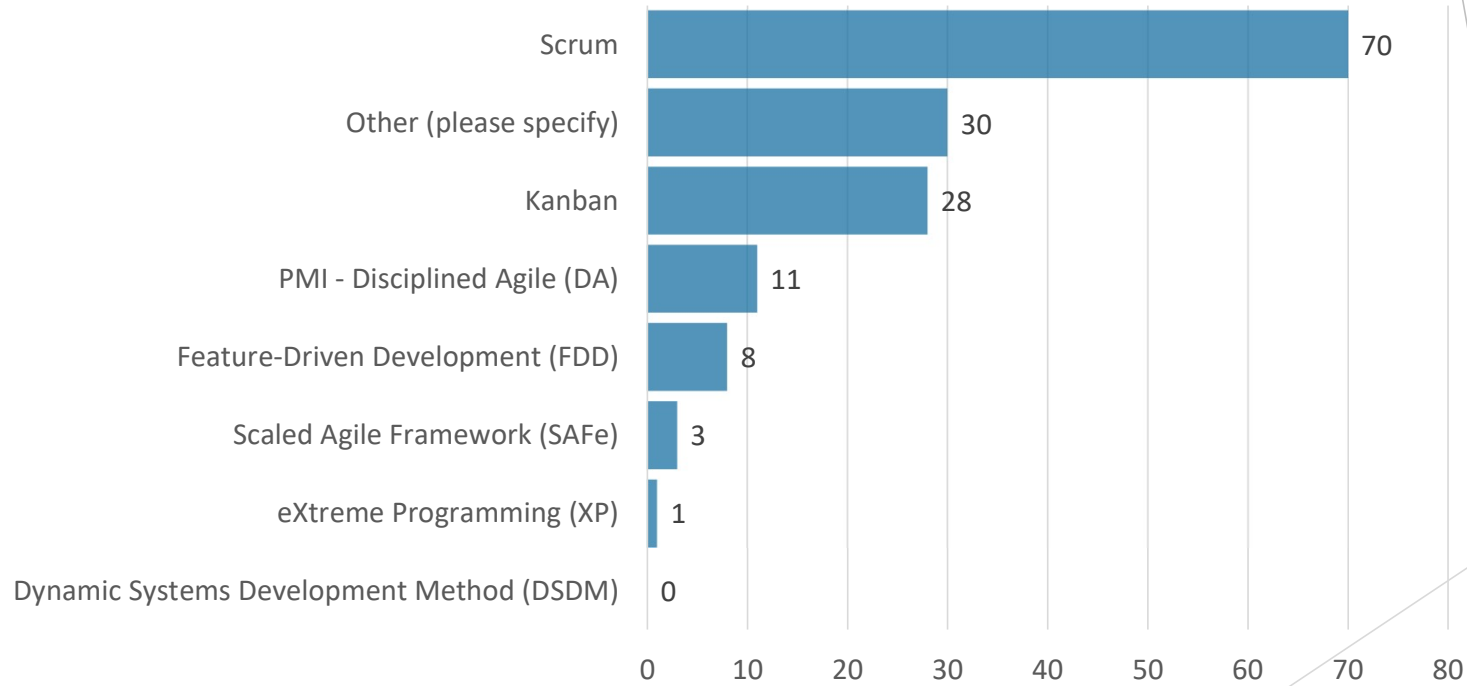
# Work Stream 1 – Agile Scan: Assessment Survey

Q6. Identify which of the following common Agile challenges you have experienced at your organization (Select as many as apply).



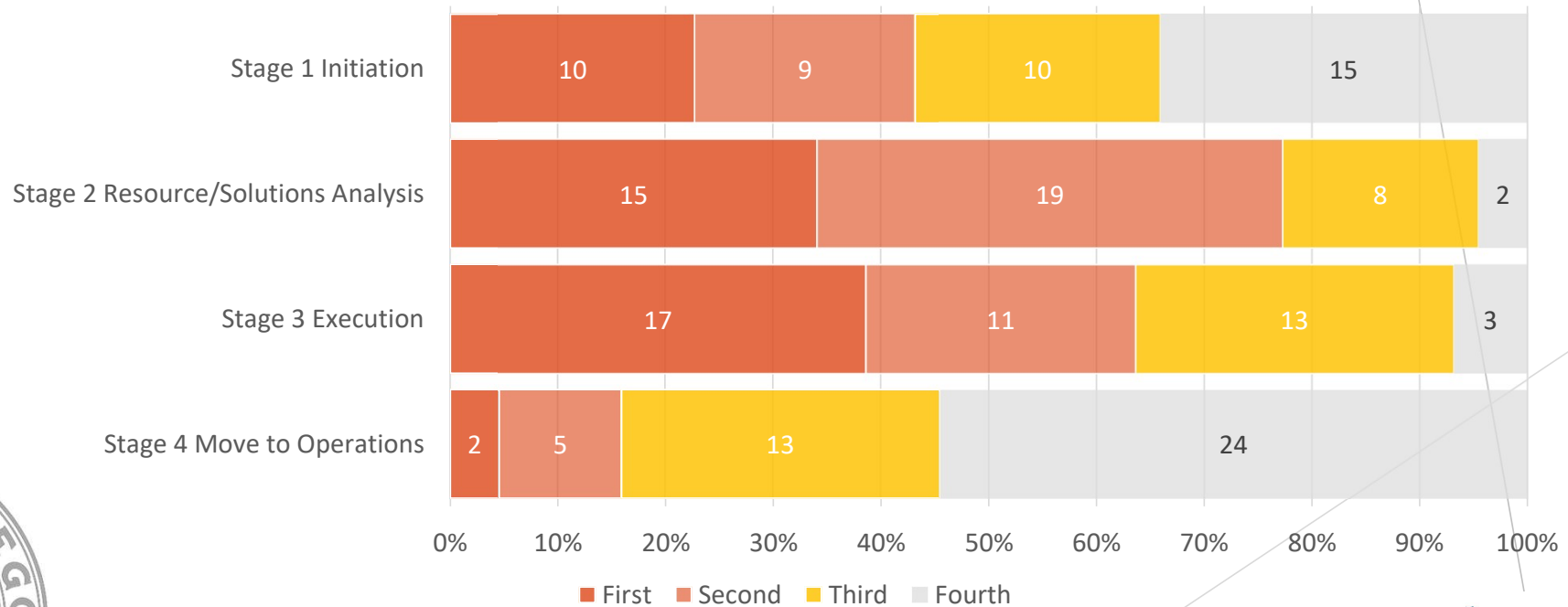
# Work Stream 1 – Agile Scan: Assessment Survey

Q9. What Agile methodologies have you used?



# WS. 1 Environmental Scan: Agile Assessment

Q12. If yes, please rank the stages during which the project experienced the greatest to the least amount of challenges.



# Work Stream 2 - Agile/SG Assessment: *Status Update*

## What we're doing...

- Traditional-to-Agile Gating Artifact Mapping\*
- Tailored oversight requirements for Agile Pilots
  - SG 1 Initiation Documentation + Readiness Assessment\*
  - Agile-friendly endorsements + Required Artifacts Form (RAF)
  - SG 3A/3B Incremental endorsements
  - Status reporting with agile metrics

## What's next...

- Synthesize findings from Agile Environmental Scan ("State of Agile")
- Develop recommendations

\*Alex Ciraco, "Create an Agile-Friendly Project Gating and Governance Approach" (Info~Tech Research Group), accessed June 23, 2023, <https://www.infotech.com/research/ss/create-an-agile-friendly-project-gating-and-governance-approach>.

## WS. 2 Agile/Stage Gate Assessment: *Agile Blueprint*



### ***Tools and Templates***

- Agile Readiness Assessment
- Traditional-to-Agile Gating Artifact Mapping Template
- Gate 3A/3B Checklist
- Agile Project Status Reporting
- Project Burndown Charts

\*Alex Ciraco, "Create an Agile-Friendly Project Gating and Governance Approach" (Info~Tech Research Group), accessed June 23, 2023, <https://www.infotech.com/research/ss/create-an-agile-friendly-project-gating-and-governance-approach>.

## Work Stream 3- Agile Pilots: *Status Update*

### What we're doing...

- Establishing criteria for Agile Pilots
  1. Agile Readiness
  2. < \$5million (i.e., no iQMS)
  3. Early-stage project/Pre-RFP
  4. No more than one Agile Pilot per Policy Area
  5. Initial Complexity Assessment (ICA)
    - Level 1, 2, or 3?
- Identifying potential Agile Pilots

### What's next...

- Identify eligible Agile Pilot and confirm participation
- Confirm oversight requirements for Agile Pilots and develop initial endorsement conditions, agile-friendly RAF, and thresholds for SG 3A/3B endorsement
- Project Oversight and lessons learned



## Work Stream 4 - Agile Training, CoP and Comms: *Status Update*

### What we're doing...

- Stakeholder Impact Mapping
- Communications planning
- Engaging the Oregon Project Management Advisory Board (OPMAB), including the Project Management User Group (PMUG) and Business Analysis Networking Group (BANG)

### What's next...

- Partnering with OPMAB and PMUG on the establishment of an Agile CoP
- Developing an Agile guidance to promote shared understanding
- Identify training opportunities and resources (both for the business and IT; e.g., Product Ownership)



# Questions?

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*Thank You*



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