To: Distribution  Date: August 11, 2003

From: Steve Wesson

Subject: The Project Development Flow for High Impact Campus-wide Projects
        Follow up

I would like to thank you all for participating in our first project managers’ session on “The Project Development Flow for High Impact Campus-wide Projects”. As you will recall our meeting goals were to:

1. Define the expectations and implications of the individual steps in the campus methodology
2. Share experiences on best practices and best ways to move projects through this methodology
3. Encourage a philosophy of mutual support and a sense of belonging to a team of project management professionals that crosses across departmental lines

I am very happy to report that the feedback I received from many of you in debriefing meetings says that we scored high marks with goal number three. People found coming together with peers in this format most useful. The common feeling was that it helped develop synergy among one another and that it was particularly useful to see how others interpreted the framework.

Our first task was to develop a common definition for Functional Sponsor. The discussion produced a range of definitions. Most agreed that we generally view functional sponsors as oversight groups. The term is also used synonymously with stakeholder, although there are many stakeholders who are not functional sponsors. Functional sponsors can be internal or external to a department where the project originates. They are the key, and some would say the only legitimate, project champions—they have the operational need and theirs is the responsibility to justify the system to the institution.

The group identified managing the functional sponsor relationship as a critical success factor. We learned that the working relationships with the functional sponsors are most effective when expectations are clearly defined at the early stages of the project. Projects of this magnitude have a higher probability for success when team member roles are established up front. Ground rules should be set for how decisions are made and what constitutes consensus. Project teams should agree on what conditions must be met in order to move on to the next step in the process. Ongoing communications in the form of a status report was recommended as a useful tool for keeping everyone informed of the
progress being made. Other best practices shared revealed that a vital aspect of the project managers’ responsibility is to take an active role in maintaining these lines of communication. Ownership on the part of the project manager means “hanging in there” as the motivator and coach when necessary. One-on-one roll-up-your-sleeves face time meetings may even be called for to break down obstacles that stand in the way of progress.

One exercise of the day was to identify the major elements of box number 7. The following items were accepted as those components.

**Needs Assessment**
- Initial estimated timeline and any key launch dates
- Central and distributed customer categories
- Central and distributed customer requirements
- Risk assessment
- Business/customer impact
- Process flows (current and proposed)
- Business rules
- Reporting requirements
- Performance requirements
- Availability/disaster recovery requirements
- Portability requirements
- Security requirements
- Reliability requirements
- Volume/growth estimates (users, transactions, data retention)

**Detailed Project Description**
- Business Problem to be solved
- Key assumptions and dependencies
- Exclusions
- Bounds of project/project objectives
- Sponsorship
- Major milestones and deliverables
- Criteria that determine completion
- Scope of a proposed project
- Non-technical terminology

We agreed that this group should establish a regular bimonthly meeting schedule. The aim would be to continue building on a foundation of process communications. Everyone agreed that this was a good start but that much work remains if we are to fully implement a successful process for UCLA.

During debriefing several of you requested and end-to-end review of the process. Some commented that this style of project management reflected a new way of doing things
stimulating an entirely new way of thinking. Still others who are skilled in similar processes simply want to reconcile this framework against their past practices. Reviewing the process in its entirety would provide a level set across the campus IT project management team. The feeling is that this would lay the foundation for the concept of this framework.

Given all of your comments and feedback I am recommending that we move forward with the following actions:

1. Calendar the next two meetings (mid September, and mid November)
2. The September meeting will be dedicated entirely to educating the group on the overall framework (boxes 1-24). The meeting will be scheduled for 90 minutes but could take less time. This session alone would be conducted in a training class format rather than a brainstorming discussion format. The goal is to firmly plant the concepts and to clarify commonly used terms. As a follow action a list of agreed upon operating principals will be documented and distributed to the group.
3. Between the September and November meetings, each group member will receive a copy of a model PCD. You will be expected to review it prior to the November meeting.
4. The November meeting will be used to focus on the preparation and successful use of the PCD. The format will be a case study discussion facilitated by the author of the selected PCD.
5. In subsequent meetings we hope work as a group on actual cases. Providing support to the various members of our team on their individual projects.

This recommendation is being circulated for your review and comment. Please feel free to contact me directly by phone at x68943 or via email. Provided that you all agree with these steps for moving forward I will ask Gwen Kingi to contact you and schedule our next meeting.

Distribution: Bonnie Allen, Anita Cotter, Paul Craft, Jim Davis, Judith Freed, Larry Inks, Jackson Jeng, Gwen McCurry, Andrew Neighbour, Kathleen O’Kane, Nick Reddingius, Jackie Reynolds, Rose Rocchio, Terry Ryan, Eric Splaver, Richard Valenzuela, Steve Wesson, Esther Woo-Benjamin, Don Worth