

## Administrative Systems

# Project and Resource Review Team

### PURPOSE

The Project and Resource Review Team (PRRT) was formed in September 2018 to support the director-level Portfolio Review Team (PRT) in the successful delivery of the annual Northwestern IT Administrative Systems (AS) project portfolio in support of the University's and NUIT's strategies and priorities.

The PRRT focuses on assigning and supporting project managers and on allocating resources to projects and managing those resources, setting up project teams for successful project delivery.

The primary objectives of the PRRT include, but are not limited to, the following:

- Improve efficiency and effectiveness of delivery of projects within the annual AS project portfolio, on time and with the best use of available resources.
  - Ensuring the right resources are available for the projects in the portfolio when needed.
  - Providing project oversight, including supporting and assisting project managers as needed through the project lifecycle (Define, Plan, Work, Close).
- Increase the availability of AS resources for project work.
- Improve AS practices and execution in the following areas:
  - Project planning and management: more complete charters, more complete plans (including resource plans and task schedules), and more timely and informative status reports.
  - Resource planning and management: more accurate definition of project capacity by person and resource type, better understanding and oversight of resource allocation, and accurate time reporting across projects.
  - Portfolio planning and management: more complete, timely, and problem focused project requests, more complete, timely, and ongoing communication with business partners and governance committees.
- Improve collaboration across AS and between AS and other NUIT units.

### MEETING INFORMATION

The Project and Resource Review Team will meet weekly. Meetings are scheduled through FY20 and typically occur on Wednesday at 1 pm for an hour. Meetings may be cancelled when there are insufficient materials for discussion or insufficient availability among membership.

Meetings will be facilitated by the Office of Portfolio Management (OPM). The standard information to be discussed is available in Daptiv via "views" and "reports" that are available to PRRT members in real time.

### PARTICIPATION

Members are requested to attend meetings. A recap of each meeting will be provided via email after the meeting. If a member is unable to attend a scheduled meeting it is the member's responsibility to review the recap.

## MEMBERSHIP

The PRRT consists of AS Managers:

| Member                 | Team  |
|------------------------|-------|
| Maureen Knight-Burrell | ADO   |
| Moses Phenany          | ADO   |
| Ashish Agrawal         | DMA   |
| Rob Hartzler           | DMA   |
| Neeraj Jajodia         | DMA   |
| Elizabeth Earl         | ESAF  |
| TBD                    | ESAF  |
| Mark Reynolds          | ESHRS |
| TBD                    | ESHRS |
| Myndi Brown            | IdS   |

The PRRT includes OPM staff as well:

| Member       | Team |
|--------------|------|
| Brian Daly   | OPM  |
| Amy Engstler | OPM  |
| Steve Kahrs  | OPM  |

## RESPONSIBILITIES

- Resources:
  - Develop and maintain project availability information for all AS resources.
  - Estimate resource needs and high level timelines for new project requests and maintain that information, including cross team resource needs (both within AS and within IT).
  - Assign project managers and conduct turnover of new projects to project managers.
  - Assign resources to projects.
- Requests:
  - Review new project requests, making recommendations for:
    - Inclusion in the current portfolio (immediately or later), with recommendations for how to adjust the portfolio and resourcing.
    - Inclusion in the backlog.
    - Declining the request.
  - Communicate with requestors regarding the status and disposition of requests.
- Portfolio:
  - Conduct annual portfolio planning process and quarterly portfolio reviews, in collaboration with directors:
    - Plan and confirm resourcing and timelines for the annual portfolio.

- Review and adjust or confirm resourcing and timelines during the year as the portfolio is executed.
- Projects:
  - Review projects as they move from Define, to Plan, to Work, and to Close.
  - Review key project artifacts:
    - Charters.
    - Task schedules and schedule baselines.
    - Status reports and status updates.
  - Monitor project status, work, and progress.
  - Address project issues and risks.
  - Address project changes.
  - Monitor project health, intervening when needed.
  - Monitor project resource utilization and review alignment with estimates.
  - Achieve successful project outcomes.
- Time Tracking:
  - Monitor time entry, ensuring accuracy and completeness.
  - Review time entry, ensuring focus on priorities and portfolio projects.

### DOCUMENT REVIEW

This team charter will be reviewed and updated annually or as needed. The annual review will coincide with a new calendar year. The OPM will initiate an annual review process.

This document was approved by the Project and Resource Review Team on February 13, 2020.