eRA Project and Portfolio Management

❑ eRA Environment

- eRA provides the infrastructure for conducting interactive electronic transactions for the receipt, review, monitoring, and administration of grant awards.
- Over $37 billion in grants awarded annually through eRA systems.
- The eRA Commons is the external face of eRA and the way we interact electronically with the extramural research community.
- IMPAC II is the internal system used by staff to process grant applications.
- More than 27 Institutes and Centers; Designated DHHS enterprise system for research grants management for Operating Divisions; Other Federal Agencies.

❑ Initial Assessment Summary – 2004-2005

- **Culture:** Improving project management capability is viewed as critical to support eRA's business needs.
- **Organization:** No clear division nor definition of roles and responsibilities.
  - There is general agreement on centralizing some PMO functions, but there are differing opinions on others.
- **Skills:** Shortage of PM skills.
- **Methods/Process:** Lack of Usage of common Project processes.
- **Measurements**: A lack of appropriate measurements.
- **Tools:** Lack of a PM Toolkit, actual project template samples, and a Web based Intellectual Capital Repository preclude ease of use and reusability.

❑ Organizational Change Management - 2006

- Culture:
  - Team based management.
  - Project thresholds defined to determine level of depth and scalability of best practices.
- Organization:
  - PMO Initiation, Approval, and Startup
- Skills:
  - Staff trained on PMO processes
  - Informal mentoring for high-risk projects
- Methods/Process:
  - SDLC best practices.
  - Release Management
  - Policies, Procedures, Checklists, & Templates
- Measurements:
  - Quality Assurance and IV&V

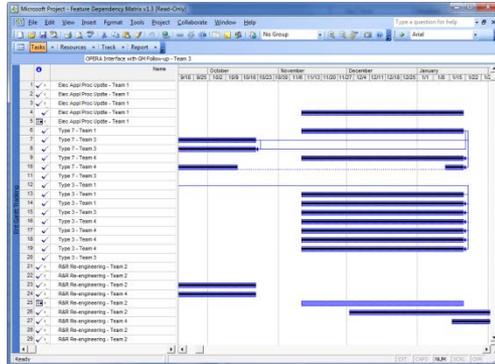## ❑ Project and Portfolio Management Tools

- Project Management Tools
  - Microsoft Project Server
  - Microsoft Project
  - ClearCase
  - ClearQuest
  - Project Dashboard (Excel)
  - Process on Demand (POD) Website
  - Project Management Plan (PMP)

- Portfolio Management Tools
  - Portfolio Dashboard (Excel)
  - Financial Dashboard (Excel)
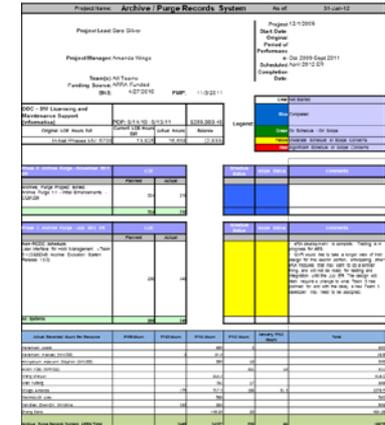
eRA Project and Portfolio Management

Tracking Projects: Microsoft Project Server
- Project Schedules
- Team/System Schedules
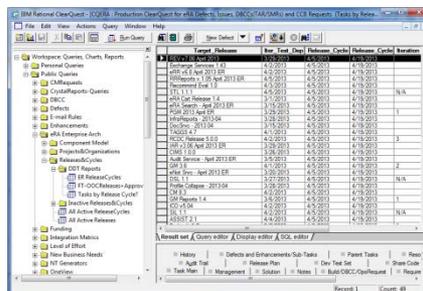- Feature Dependency Matrix

Tracking Projects: Dashboards
- Project Dashboard: Monthly consolidated view of project status.
- Includes scope and schedule risks.
- Includes phases of project.
- Includes planned versus actual hours charged.
- Includes specific resources.

Tracking Projects: ClearCase, ClearQuest
- ClearCase: Version control of project documents.
- ClearQuest:
  - Pipeline Management
  - Ticket Management
  - Reports

Portfolio Management Tools
- Portfolio Dashboard: Monthly consolidated view of Program status.