



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

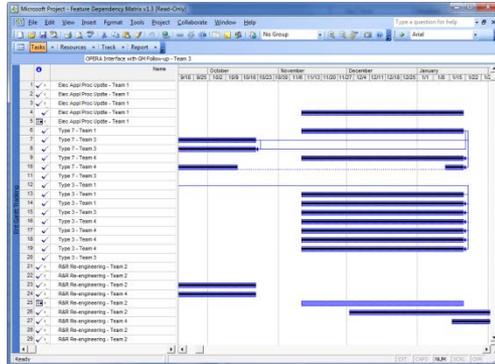
- Project Management Tools
 - Microsoft Project Server
 - Microsoft Project
 - ClearCase
 - ClearQuest
 - Project Dashboard (Excel)
 - Process on Demand (POD) Website
 - Project Management Plan (PMP)
- Portfolio Management Tools
 - Portfolio Dashboard (Excel)
 - Financial Dashboard (Excel)



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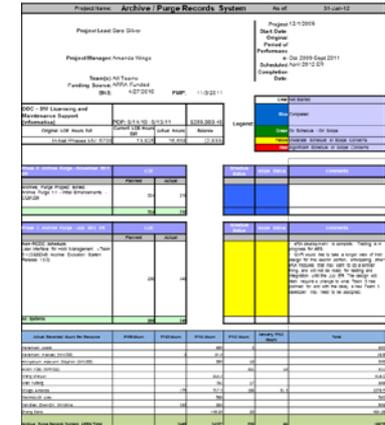
Tracking Projects: Microsoft Project Server

- Project Schedules
- Team/System Schedules
- Feature Dependency Matrix



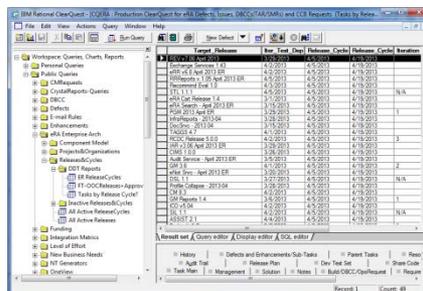
Tracking Projects: Dashboards

- 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.

Case No.	Project Name	Phase I	Phase II	Phase III	Phase IV	Phase V	Phase VI	Phase VII	Phase VIII	Phase IX
2011 Governance										
1	Improve Commons Personal Profile Usability	TRD	TRD	TRD						
2	Electronic Application Processing Updates (eSIS)	Apr-11	Jul-11	Jan-12	Oct-12	Jan-13				
4	Accommodate Automated FCO Updates	Oct-11	Jan-12	Jul-12	Oct-12	Jan-13				
8	Research Performance Progress Report (RPRR)	Jan-12	Jan-12	Jul-12	Oct-12	Jan-13				
2010 Governance										
7	Receipt & Refine the Engineering (Engineering P&O)	Oct-10	Nov-10	Feb-11	May-11	Jul-11	Nov-11	Nov-11	Apr-12	TRD
9	Type 2a - Electronic Intake	Oct-10	Jul-11	Jan-12	Apr-12					
10	Type 7a - Electronic Intake	Apr-11	Feb-11	May-11	Jul-11	Jan-12	Apr-12			
ADRA Funded										
12	SHARBS Integration	Oct-10	Apr-12	Apr-12	Apr-16	Oct-11	Dec-11			
18	Federal Financial Report (FFR)	Jan-10	Jul-10	Feb-11	Feb-11	Jul-11	TRD			
17	Web Front-End for Submitting Complex Applications	Nov-11	Nov-11	Apr-12	Apr-12	Apr-12	Apr-12			
Maintenance Funded										
19	IS&M Compliance	Jan-10	Apr-10	Feb-12	May-13					
24	EP&A Interface with Grants Management System	Feb-11	Feb-11	May-11	Oct-11	Jan-12				
29	Archive/Purge Records System	Jan-11	Feb-11	Nov-11	Jul-11	Oct-11	Nov-11	Jul-12	May-12	TRD
Director Funded										
25	National Center for Advancing Translational Sciences (NCATS)	Apr-12	Jan-11	Apr-11						
2009 Governance Funded										
18	Subjected Re-Engineering									
Maintenance Funded										
21	X-Train/EA End to End									
23	IS&M Compliance									

