

HATFIELD RESIDENT FELLOWSHIP PROJECT BRIEF

Bureau of Technology Services

Unified Project and Portfolio Management Intake Process

Project Dates: July/2023 – February/2024

PROJECT GOAL

The Bureau of Technology Services (BTS) serves as the City of Portland's in-house information technology service provider – supporting the technology needs of over 7,000 City employees and hundreds of thousands of community members seeking digital access to City Services. BTS provides a wide range of services, such as:

- Managing and staffing a Technology Help Desk for all City of Portland employees' use
- Developing and maintaining the City's websites and payment gateways
- Developing and maintaining core infrastructure, like fiber networks and data centers
- Implementing and managing longer-range technology planning and information security to protect the City, its residents, and stakeholders

In order to manage incoming workloads and business requests more efficiently, BTS designed and prepared to launch an updated work intake process, called the Unified Project and Portfolio Management (UPPM) Process. The Hatfield Resident Fellow (HRF) was tasked with working with the Project Management Office (PMO) and Business Engagement and Technology Strategy (BETS) Teams to finetune and document the process, assist in Artifact and supplementary document creation, support with change management and stakeholder communication, and ultimately deliver a process proof-of-concept to Bureau Leadership and inter-Bureau partners for approval.

CHALLENGES

The HRF was tasked with several nesting project goals, with each phase "waterfalling" into the next towards final Bureau approval and implementation. As the UPPM Development Process began roughly 18 months before the HRF was brought on, they lacked a thorough historical knowledge of the efforts and work initiatives already underway. Initial challenges then centered around reviewing a significant volume of prior UPPM work, which included process diagrams, flowcharts, Artifacts, and explanatory documents. The HRF had to quickly gain a cursory understanding of BTS operating policies and of the technology and IT fields so as to become knowledgeable about project intake inputs and outputs. The HRF was also the only UPPM Development Team member who was working full-time on the project, which resulted in occasional delays due to staffing capacity.

As the Fellowship progressed, new challenges arose around convening stakeholders/participants at specific project benchmarks for effective collaborative work and approval, Bureau change management, and managing staff time and capacity. Scheduling became a central area of concern nearing the final stages, as the limited duration of the Fellowship restricted the HRF's ability to participate in the final process launch scheduled for spring 2024.

STRATEGY

The HRF role primarily served as a process energizer and project organizer to help in the mid- and late-stage development phases. They served as an outside observer, and then active participant, at UPPM Development Team meetings and documented and brought forward their assessments, concerns and suggestions in the terminal concept and process design phases. The HRF completed the following tasks in pursuit of launching the UPPM Process:

- Participated in weekly work session meetings with PMO and BETS Managers to facilitate consistent and clear communication between management/Bureau Leadership and the UPPM Development team
- Conducted and participated in weekly work sessions with the UPPM Development Team members to complete collaborative work and decision-making about the UPPM Artifacts, documents, and collective process
- Executed detailed reviews and analyses of proposed UPPM Artifacts and documents for viability, usability, and functionality
- Completed in-depth and informational interviews with key BTS staff, both assigned and peripheral to the UPPM Process, particularly within the PMO and BETS teams
- Completed entry-level project management research to best prepare for understanding the PMO strategy and how to manage the UPPM Development Process most effectively

RESULTS

At the completion of the Fellowship, the HRF helped to facilitate the packaged delivery of the UPPM Process and Protocols to Bureau Leadership and relevant participating Divisions/Teams. These included:

- Development and delivery of UPPM Artifacts (four forms in total, including a Business Story, Business Analysis, Project Assessment Team Analysis, and PMO Scheduling Worksheet) and instructive documents for BTS and Business Partner use
- Development and delivery of UPPM Process Presentations and informational/educational materials for BTS staff training
- Development of the UPPM/Project Assessment Team meeting facilitation process and procedurals

TAKE-AWAYS

Ultimately, the Hatfield Resident Fellowship was an incredibly rewarding experience that gave me an in-depth view of local public service and project management. Participating in the Fellowship while the City of Portland is navigating Charter Reform was enlightening as well, as it is a new operational frontier for the City and its Bureaus to navigate. I greatly valued being able to witness that change from an internal vantage point.

I also appreciated the kindness and patience gifted to me from my BTS colleagues and the helpful mentorship and guidance of my supervisors, Lisa Bigley and Shawna Graber. The challenge of submersing myself into a complex project management environment was made infinitely easier due to their patience and professionalism, and I am incredibly grateful to have been able to work alongside them and their teams.