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Project Management Plan

Strategic Planning Development Team

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Presidents Office

Portland State 20/20

Strategic Planning Project 2014-2015

Project Management Plan

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Purpose

The goal of this project is to develop a new Strategic Plan for Portland State University (PSU) per the charge from the newly formed Board of Trustees.

Scope

This effort will work hard to engage as many voices from across campus as possible in the creation of the new strategic plan. While the plan will seek to provide guidance for 5-10 years there will be special attention on the goals for the 2-5 year time frame. The plan will serve as a guiding framework for decision making and should provide a clear direction for the future of PSU.

Assumptions

- This project has explicit support from PSU executive leadership including the ongoing guidance, support and resources needed to keep the project moving forward within the time provided.
- The project participants and identified stakeholders have the time to accommodate this project in addition to their daily workload.
- There is a desire by the PSU community to be involved in the development of the strategic plan.

Governance



Roles & Responsibilities

Project Role/Assigned Parties	Responsibilities
Board of Trustees	<ul style="list-style-type: none"> • Body responsible for issuing the charge for this work • Responsible for ultimate approval of the Strategic Plan • Maintains a presence on the SPDT
Project Owner <ul style="list-style-type: none"> • Wim Wiewel 	<ul style="list-style-type: none"> • Accountable to the Board of Trustees to present a new Strategic Plan per the Board's charge • Responsible to charge the SPDT • Ensure resolution of conflicts or issues raised by the Strategic Planning Development Team or the project support team)

	<ul style="list-style-type: none"> • Ultimate authority and responsibility for the project budget, timeline and scope • Responsible for executive level communication of the project • Assure availability of essential project resources • Have a presence at the SPDT whenever possible to maintain an open line of communication • Review final recommendation and work with SPDT to make any adjustments • Make the Strategic Plan final recommendation to the Board of Directors.
<p>Strategic Plan Development Team (SPDT)</p> <ul style="list-style-type: none"> • Carlos Crespo • CeCe Ridder • Chas Lopez • Darrell Brown • Dilafruz Williams • Erin Flynn • Ethan Seltzer • Gayle Thieman • Irving Levin • Jamaal Green • Jennifer Ruth • Kate Bingaman-Burt • Kelly Cowan • Keva Miller • Kim Cooper • Lisa Zurk • Mark Jones • Michael Bowman • Nicole Morris • Noor Delaughn • Pam Miller • Pat Wetzel • Ralf Widenhorn • Rayleen McMillan • Rob Fullmer • Sona Andrews • Steve Percy • Susan Lindsay 	<ul style="list-style-type: none"> • Responsible for development of PSU's Strategic Plan - Makes recommendations based on chair's assessment of general consensus • Assist in Issue Management by removing obstacles inhibiting the team or its stakeholders from forward progress and as otherwise defined by resolution procedures • Engage as a decision making body • Responsible for communication of the project as applicable • Participate on topic teams • Support and provide guidance to the topic teams as needed • Act as champions of this project and the plan that emerges • Utilize feedback from the campus community and community at large in development of the strategic plan • Support and help execute the overall outreach plan

<p>Chair of SPDT</p> <ul style="list-style-type: none"> • Steve Percy 	<ul style="list-style-type: none"> • Works with the project support team to resolve any issues or answer questions about procedures • Ensure proper execution of governance model to enable decision making for the SPDT
<p>Topic Teams</p> <ul style="list-style-type: none"> • Student Experience • Role of Research • TBD 	<ul style="list-style-type: none"> • Focused teams responsible for deeper consideration of key strategic questions • Carry-out specific assignments from the SPDT • Produce recommendations for the SPDT via proposal templates • Engage the campus community in developing recommendations • Support and help execute the overall outreach plan
<p>Project Support Team</p> <ul style="list-style-type: none"> • Project Lead • Project Manager • Strategic Planning Consultants • Communications Manager • Project Analyst • Project Support 	<ul style="list-style-type: none"> • Serve as a facilitating body to organize the project and keep it on track • Help define and execute overall communications and outreach plans • Ensure outreach plan is as inclusive as possible and provides many options for groups and individuals to engage in the process • Provide campus community and external community feedback to the SPDT • Serve as first line of defense in issue and risk mitigation • Carry out daily project tasks to support the SPDT in their efforts • Serve as liaisons and project champions to all project stakeholders • Create/contribute to project deliverables as applicable • Explore the use of an equity lens in the strategic planning process and make recommendations to the SPDT • Explore applicable change management techniques and make recommendations to the SPDT
<p>Communications Team</p> <ul style="list-style-type: none"> • Harry Esteve, Lead 	<ul style="list-style-type: none"> • Responsible to develop and own the project communications plan and to

<ul style="list-style-type: none"> • Mark Wubbold • Scott Gallagher • Kari St. Peters • Michelle Janke/Matthew Landkamer 	<p>provide support to the project support team in executing the communications and outreach plans</p> <ul style="list-style-type: none"> • Execute regular project communications • Develop a project identity • Create content for project website, newsletter and any other project communications as needed
<p>Project Lead</p> <ul style="list-style-type: none"> • Lois Davis 	<ul style="list-style-type: none"> • Participate on the project support team and communications team as needed • Manage project budget • Oversee day-to-day operations of the project support team including ensuring that this team has the resources required to do the work • Work closely with project leadership (President, Chair of the SPDT and SPDT) to ensure project objectives are being met • Mitigate issues & risks at the project support team level and participate in escalation procedures as needed
<p>Project Manager</p> <ul style="list-style-type: none"> • Kari St. Peters 	<ul style="list-style-type: none"> • Responsible to act as chief liaison between all involved parties • Partner with Coraggio Group to design and execute planning process • Manage overall scope and schedule • Act as the information clearing house for the project • Own project management documentation and processes, providing general support and PM framework for execution of day to day project activities • Make sure there are clear communication paths between all identified project roles • Co-own and help execute on the outreach plan • Manage the mitigation of issues and risks • Provide best practices and guidance throughout the course of the project
<p>Strategic Planning Consultants</p> <ul style="list-style-type: none"> • Coraggio Group 	<ul style="list-style-type: none"> • Responsible for designing and leading the Strategic Planning process

	<ul style="list-style-type: none"> • Facilitate key strategy meetings • Facilitate production of Strategic Plan deliverables • Serve roles on the project support team, the communications team and within any other group in which this Strategic Planning effort is a core function • Co-own and help execute on the outreach plan • Provide best practices, guidance and general leadership throughout the course of the project • Compile drafts and final report as recommended by the SPDT and approved by the President
Project Analyst <ul style="list-style-type: none"> • Mark Wubbold 	<ul style="list-style-type: none"> • Provide research support to the project • Manage the project website • Participate on the project support team and communications teams as needed • Contribute to the development of project processes and plans • Develop white papers or final reports as needed
Communications Lead <ul style="list-style-type: none"> • Harry Esteve 	<ul style="list-style-type: none"> • Provide leadership on all project communications including leading the efforts of the communications team • Participate on the project support team • Serve as a liaison between University Communications and the project • Lead the development of content as needed including project identity and messaging in conjunction with the project support team • Own the project newsletter • Provide content for the Strategic Plan website as needed
Project Support <ul style="list-style-type: none"> • Susy Munson 	<ul style="list-style-type: none"> • Provide meeting scheduling support • Provide logistical assistance to project support team to ensure resources are available • Assist with project communications

Decision Making Model

The decision making model for this project will be a general consensus model in which minority reports may be utilized by the SPDT or Topic Teams as needed.

Development of the Strategic Plan: The SPDT is charged with the development of the plan. They will make recommendations based on the chair's assessment of general consensus. If needed, members may also write a minority report. If no decision is clear, the SPDT may refer a topic back to the Topic Team for refinement. In rare cases, a topic may be considered an "unanswered question" that will be included in the plan documentation.

Topic Teams will pursue deeper consideration of key strategic questions and will produce proposals for the SPDT. If the topic team is an existing committee it will follow the governance model of that group to arrive at recommendations. If the group is new it will make general consensus (e.g. broad agreement on a topic) recommendations to the SPDT. If there is no general consensus topic team member(s) may submit a minority report. If the topic team is unable to come to agreement the SPDT Chair will recommend review procedures.

Minority Reports: A minority report that is generally consistent with the format of the Faculty Senate minority report format is acceptable and should be submitted to the Chair of the SPDT for consideration. Minority reports will be considered along with the majority recommendation(s).

Issue Resolution Procedures

Logistical or procedural issues: If a logistical or procedural issue arises the Project Support Team will work to resolve it. Should resolution prove to be impossible at this level the matter will be escalated to the SPDT. The SPDT owns responsibility to resolve the matter using the general consensus model.

High impact issues: If a high impact issue arises, the SPDT chair will work to determine a path of resolution. This may include utilizing the President if needed.

Strategic Plan Approval Process

The SPDT will develop a draft strategic plan seeking input from the topic teams and general PSU community via the outreach plan. As pieces of the draft become available they will be put online for public comment. Once the entire plan is drafted it will be presented to the PSU community for comment. After all comments have been addressed and accounted for to the satisfaction of the SPDT the final draft will be submitted to the President. The President may decide to pose questions to the SPDT and/or to put the draft back out for comment. Once the President is satisfied with the draft he will submit it to the Board of Trustees for approval.

Deliverables

Deliverable	Owner	Contributors
ALPS Retreat Summary Report	SP Consultants	ALPS Retreat Participants
1:1 Interview Report	SP Consultants	SP Consultants, Project Manager, Interviewees
Communications Plan	Communications Lead	Communications Team, Project Support Team, SPDT
Outreach Plan	Project Manager, SP Consultants	SPDT, Project Support Team, Communications Team, Project Owner, PSU Community
Project Management Plan	Project Manager	Project Support Team, Project Owner
Project AID Log	Project Manager	Project Support Team, Communications Team
Work Breakdown Structure (WBS)	Project Manager	Project Support Team
Project Plan	Project Manager	Project Support Team
Meeting Documents	Project Manager / SP Consultants	Project Support Team
Newsletter	Communications Lead	Project Support Team, Chair of SPDT, Project Owner
Topic Team Proposals	Topic Teams	Topic Teams, PSU Community and Portland Community (the Project Support Team will support this work as articulated in the Outreach Plan)
Strategic Plan	Strategic Plan Development Team	SPDT, Topic Teams, PSU Community, Portland Community (processes for feedback articulated in the Outreach Plan)

Appendix - Board of Trustees Resolution

<https://drive.google.com/a/pdx.edu/file/d/0B6dGm4Nm7EjrYnVGZTND5wMHFPREJ0TzBBUG5GdmtZUTJZ/view?usp=sharing>