

Project Portfolio Management Tool Implementation at San Antonio River Authority

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- > Project Management Professional (PMP) certified by Project Management Institute (PMI). Attained M.B.A., M.A. and B.B.A. degrees and managed various size projects at Novartis, USAA and Shell Oil in Business Lines and Information Technology before joining to lead SARA's Project Management Program late 2002.

Agenda

- > San Antonio River Authority.
- > SARA's structured project management milestones.
- > Project Portfolio Management (PPM) selection.
- > We already realized many benefits.
- > Recommendations and lessons learned.
- > Steps to Portfolio Management.
- > Q&A .



Summary

- > Level of project management maturity is fundamental.
- > Where does your organization stand?
- > Focus on what are your project management business requirements are.
- > Determine the PPM tool that will support all stakeholder's needs.
- > Prepare your organization for the implementation.

The San Antonio River Authority

- > Created by the State of Texas in 1937 to serve Bexar, Wilson, Karnes and Goliad Counties.
- > SARA's mission: To protect and preserve our shared water resources and, together with our partners, pursue innovative solutions that will serve generations to come.
- > Twelve Board Members represent SARA's constituents in four counties:
 - Bexar County (6)
 - Goliad County (2)
 - Karnes County (2)
 - Wilson County (2)



The San Antonio River Authority is commonly referred to as “SARA.”

> Main Offices:

- SARA Administrative Building, 100 E. Guenther St.



- SARA Environmental Center, 600 E. Euclid Ave.



SARA General Information:

> San Antonio River Basin

- SARA's jurisdiction includes four counties in the San Antonio River Basin – Bexar, Wilson, Karnes and Goliad. The land surface in these counties drains mainly through the San Antonio River.
- The San Antonio River is about 240 miles long.
- The river starts at the "Blue Hole" spring at the University of the Incarnate Word in San Antonio and ends at the convergence with the Guadalupe River in Refugio County.
- There are at least 73 documented fish species in the San Antonio River.



SARA Has Five “Service Areas”

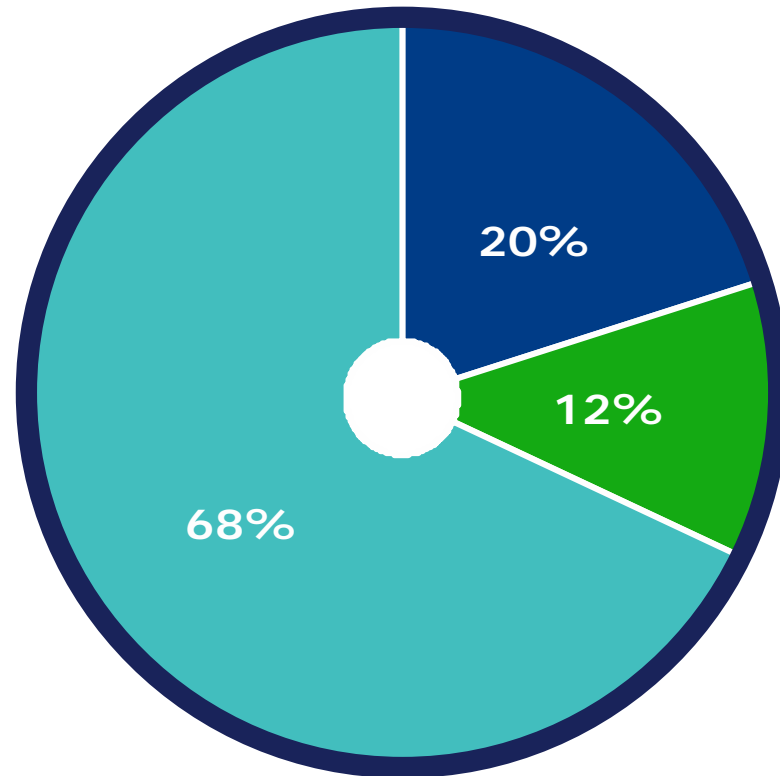
- > Water Resources – Ensure that sufficient water resources exist to serve the needs of our district.
- > Utilities – Provide wholesale and retail wastewater services.
- > Environmental Services & Water Quality – Preserve the quality and quantity of water in the San Antonio River and its tributaries.
- > Flood Control – Protect our communities from floods.
- > Park Services – Nurture our parks and natural resources.

SARA's Current Portfolio

- > Engineering, Utilities, Environmental, Studies, Digital Mapping & IT projects.
- > 16 Programs, 6 Sub-Programs
- > 108 Active Projects
- > Value \$305.6 Million.
- > Manage own funds as well as 3rd party funds (CoSA, County, COE, FEMA, grants etc.).

SARA's Current Portfolio

(Percentages are by \$305.6 distributed)



- Large Scale
 - Mid Scale
 - Small Scale
- Large scale (over \$1,000,000)
Mid scale (over \$500,000)
Small scale (under \$500,000)

SARA's Structured Project Management Milestones

- > 2002 Contract engagement with CH2M Hill to develop process and tools.
- > 2002 PMC/Project Office formed.
- > 2003-06 Process & Templates implemented, all SARA managed projects to follow the same process.
- > 2007-08 Engagement with CA and CA Clarity™ PPM implemented.



Project Portfolio Management (PPM) Tool Selection Process

- > Established Vendor Evaluation Committee
- > Evaluated 4 vendors including on-site demonstrations
- > Selected Computer Associates (CA)'s CA Clarity™ PPM as the vendor and tool of choice.
- > Established a project, and budgeted to implement during 2007-08 FY
- > Rolled out late February 2008.

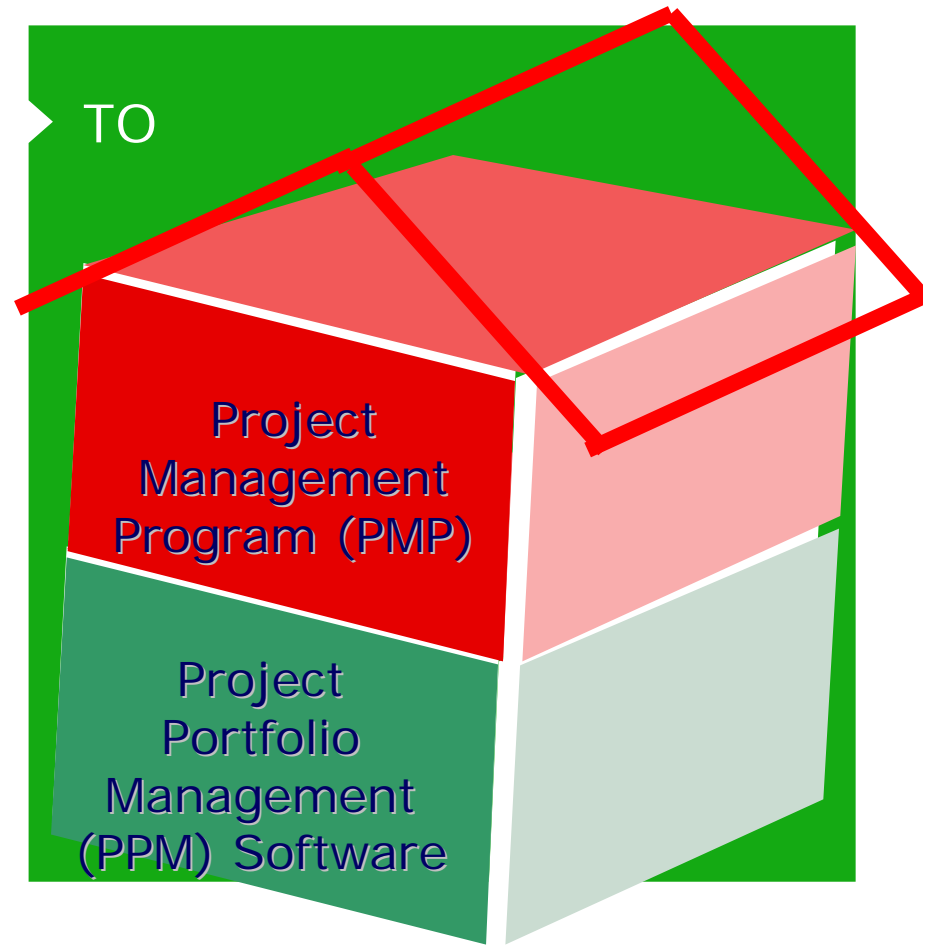
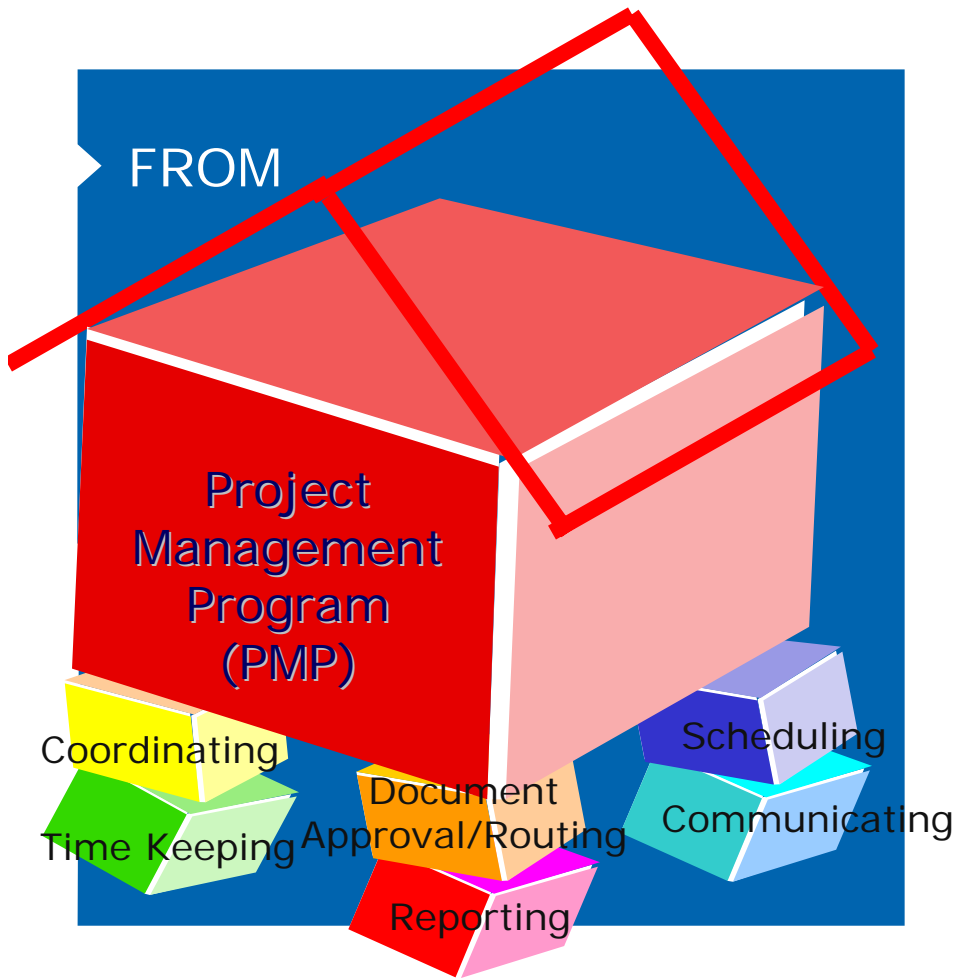


PPM Selection Criteria

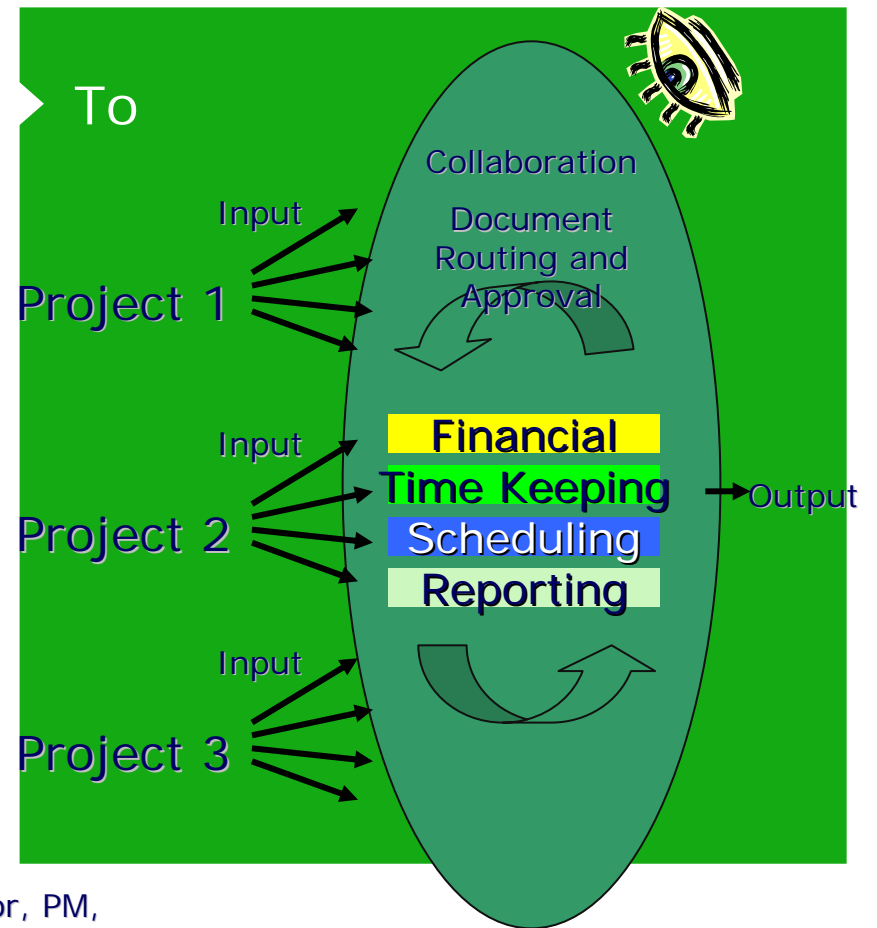
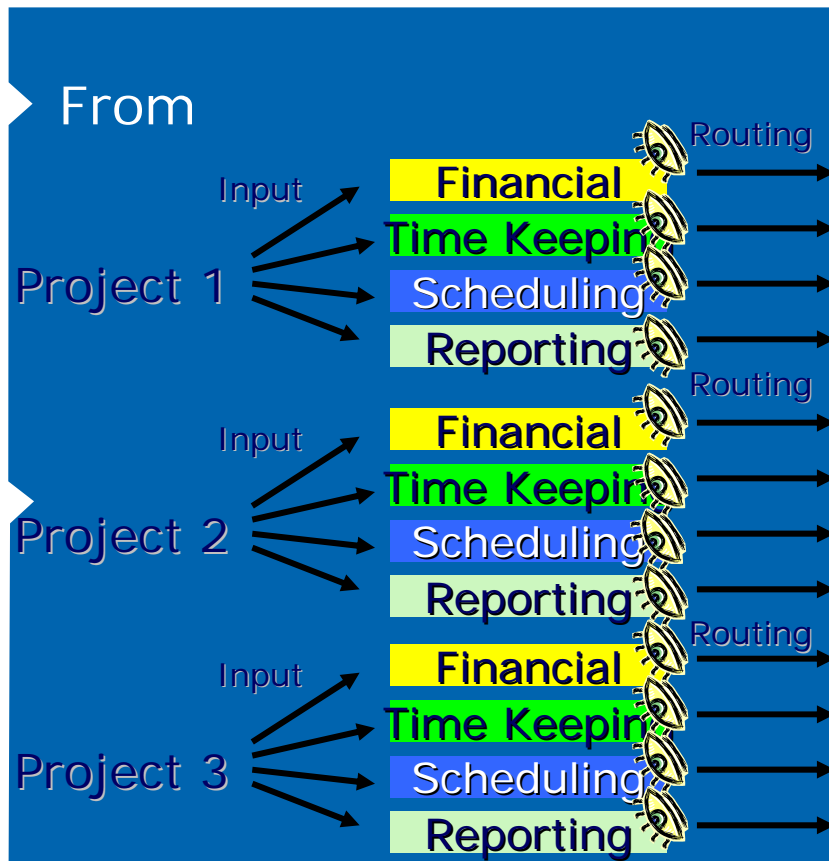
- > Augment existing tools.
- > Enhance PM collaboration.
- > Automate the existing processes.
- > Automate routing process (vs. manual)
- > Better project financial reporting and status reports.
- > Time keeping availability.
- > User friendliness.



From Desktop Applications to PPM (CA Clarity™)

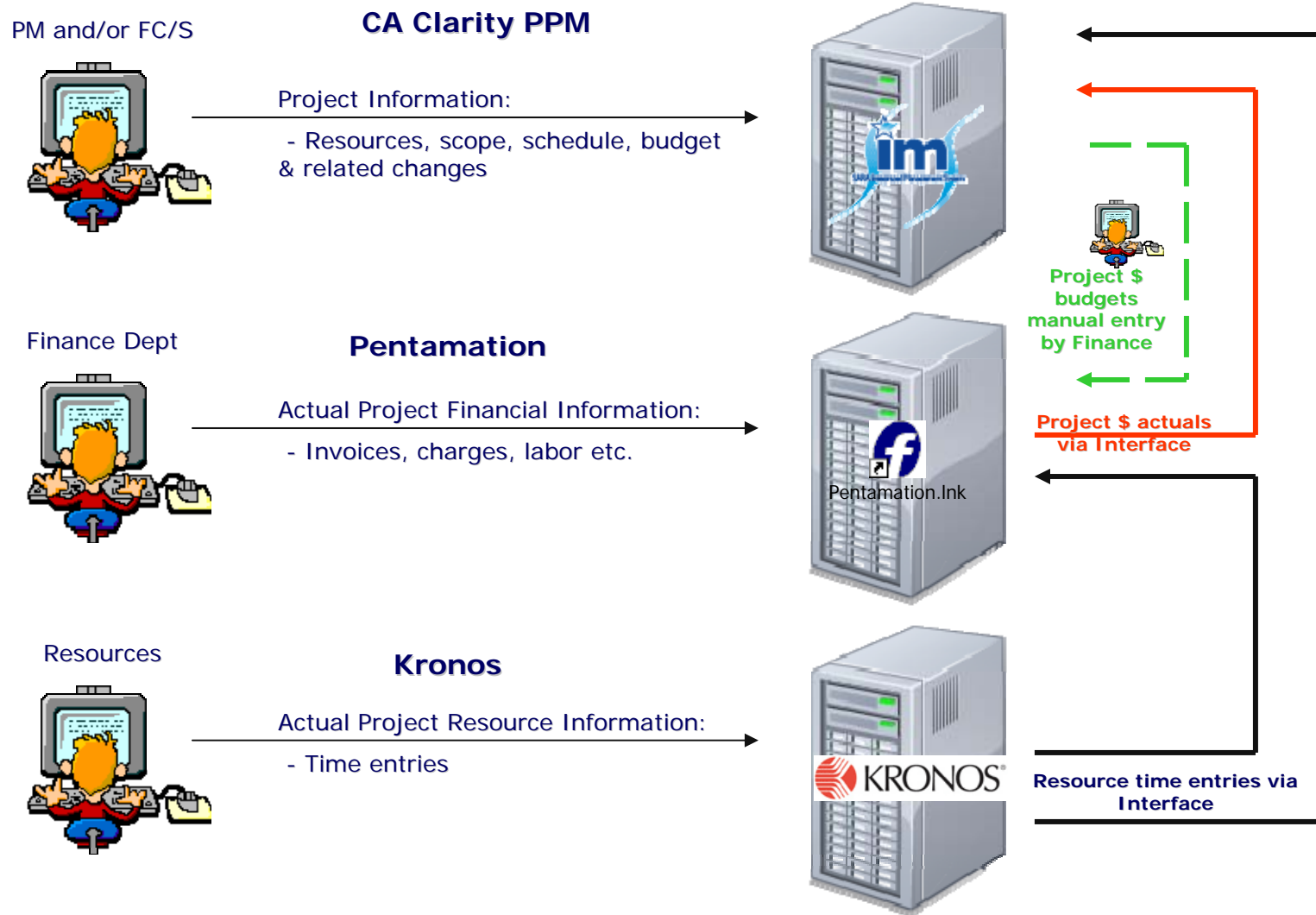


From Standalone to Collaborated View



= Sponsor, PM,
Team,
Management

From Technical Perspective (CA Clarity™ PPM)



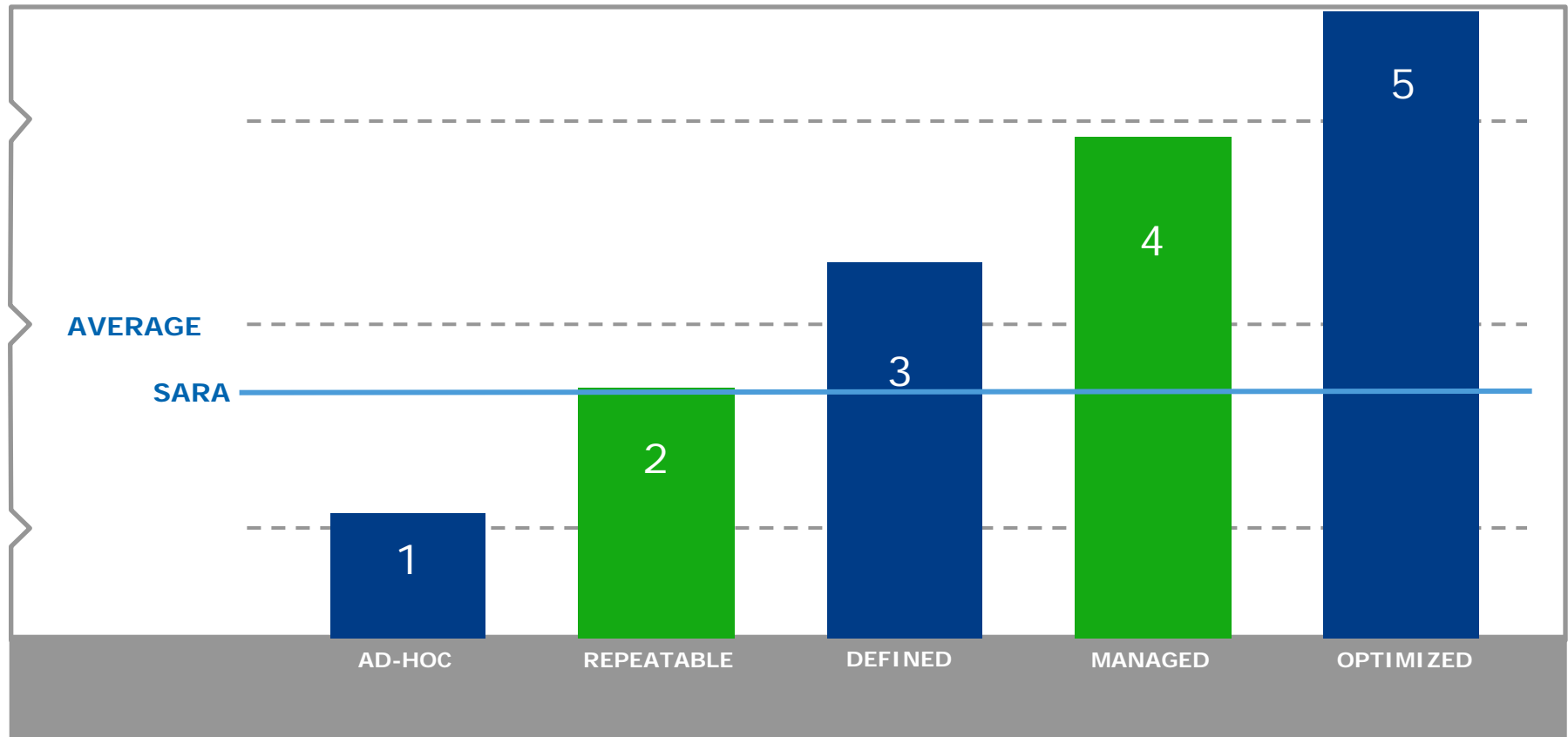
PPM Realized Benefits

- > Collaboration.
- > Forced to clean-up financial coding system: One code one project.
- > Brought the project responsibility (especially budgeting) to Project Manager level.
- > Efficient project life cycle: Projects managed proactively and timely.
- > Resource charges to projects under control.
- > Electronic document routing.

PPM Expected Future Benefits

- > Portfolio level management.
- > Resource leveling (capability analysis).
- > Eliminate paperwork duplication (desktop files in CA Clarity™ PPM).
- > More Programs and Project visibility (for better decision making).
- > External contractor/vendor and funding partners collaboration.
- > Better control (as SARA takes on more programs and projects).

SARA's Project Management Maturity Level



Capability Maturity Model (CMM): US Dept. of Defense Software Engineering Institute & SARA's Internal Assessment

PPM can be Implemented to Organizations with Varying Levels of Maturity

> Level 1

- Organizations can gain PM discipline.
- Set new processes.

> Level 2

- Organizations can improve on their processes.

> Level 3

- Manage their resources and portfolios.

Organizational Recommendations Prior to PPM Tool

- > Must have common understanding among management and project managers for the need of project management discipline.
- > Set PPM implementation as a project.
- > Training on formal project management to management, PM's and key team members.
- > Having Project Management Professionals (PMP) in the organization will have great impact.

Lessons Learned

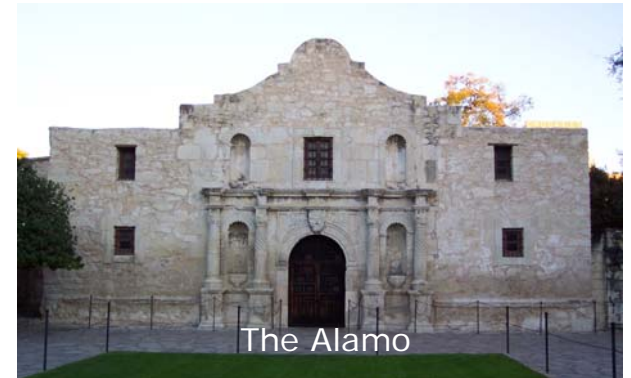
- > Set up a discovery project and pilot implementation. (especially important for larger organizations).
- > Fully train internal technical resources with CA Clarity™ PPM (recommend CA Clarity™ PPM boot-camp for internal technical support).
- > Written operating procedures & documentation is a must. (business processes, interfaces).
- > Setup a project steering group to include one representative from each line of business.
- > Provide adequate role based user training just prior to the implementation.

Steps to Portfolio Management

- > Strong management understanding for the need of project management at Portfolio Management level.
- > Well established process and procedures for project and program management.
- > Portfolio's established only in accordance with business needs.
- > Well described Portfolio Manager roles and responsibilities.
- > Great Portfolio leaders.

Contact Information

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Q&A