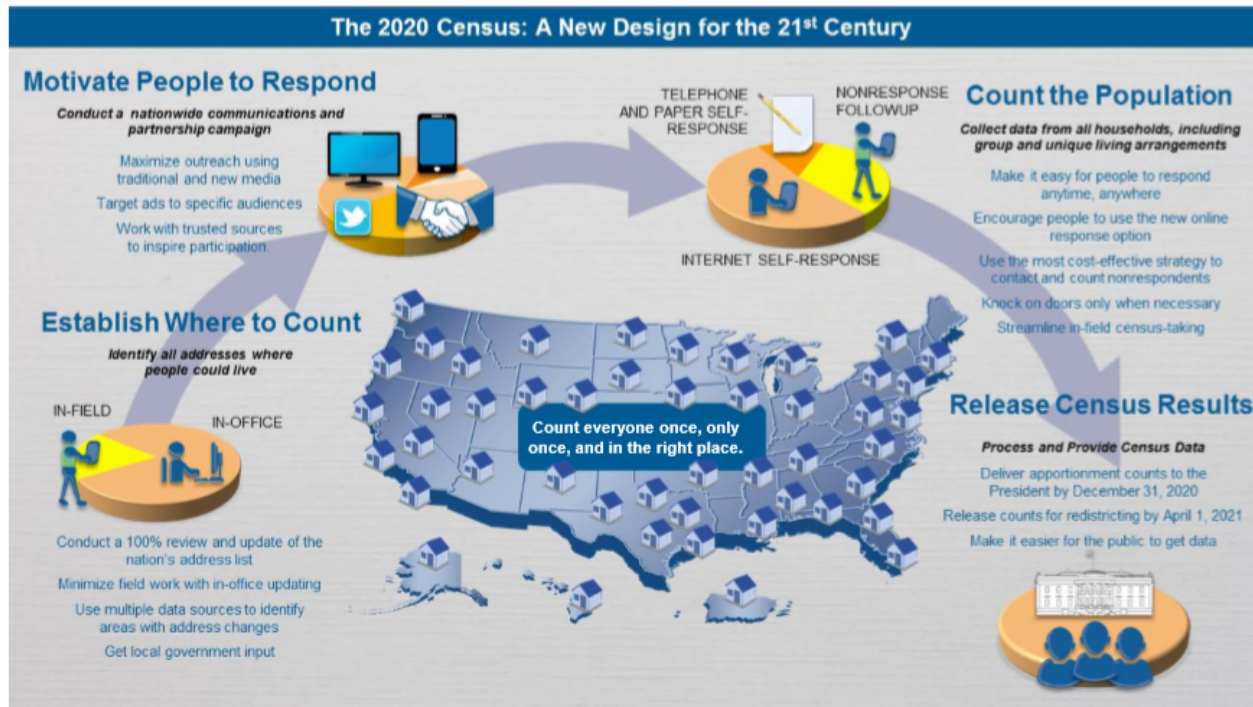http://pmsymposium.umd.edu/pm2018/

CASE STUDY: PORTFOLIO MANAGEMENT IN THE 2020 CENSUS PROGRAM

Susan Hostetter and Sherri Norris, U.S. Census Bureau

2018 Project Management Symposium

Design of the 2020 Census

(Source: Stempowski, 2017)

The 2020 Census Operations

(Source: Stempowski, 2017)
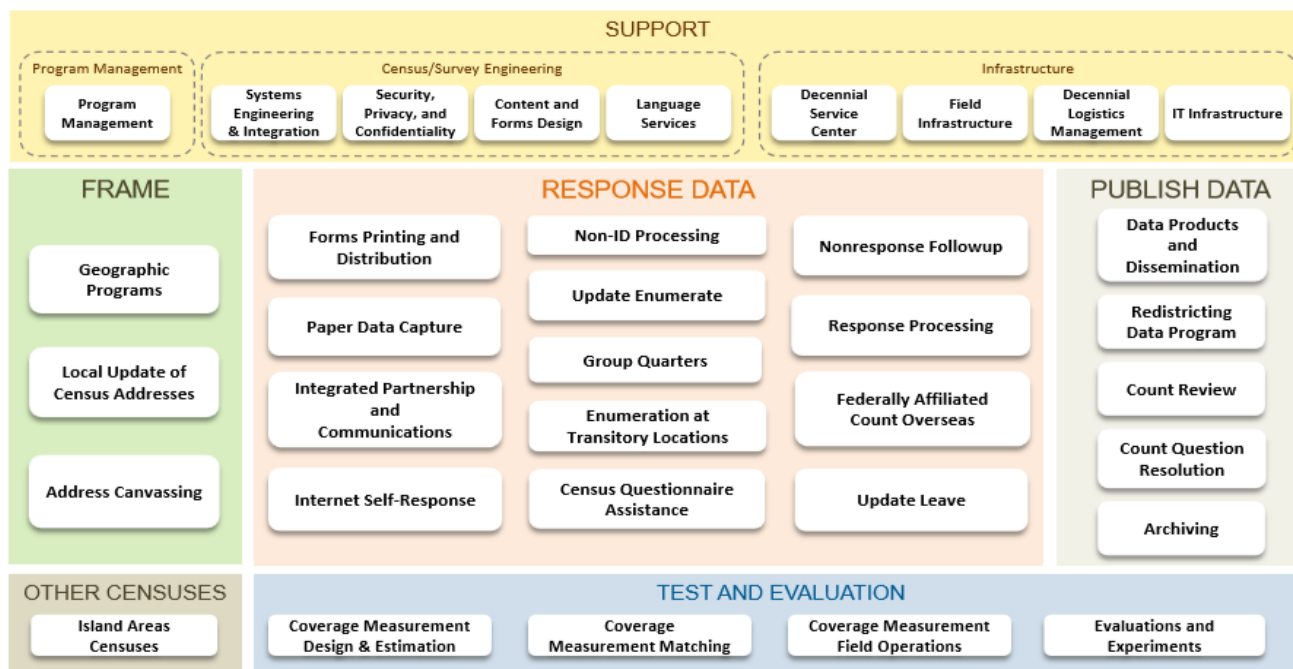
Organizations and Governance Boards for the 2020 Census Operational Plan
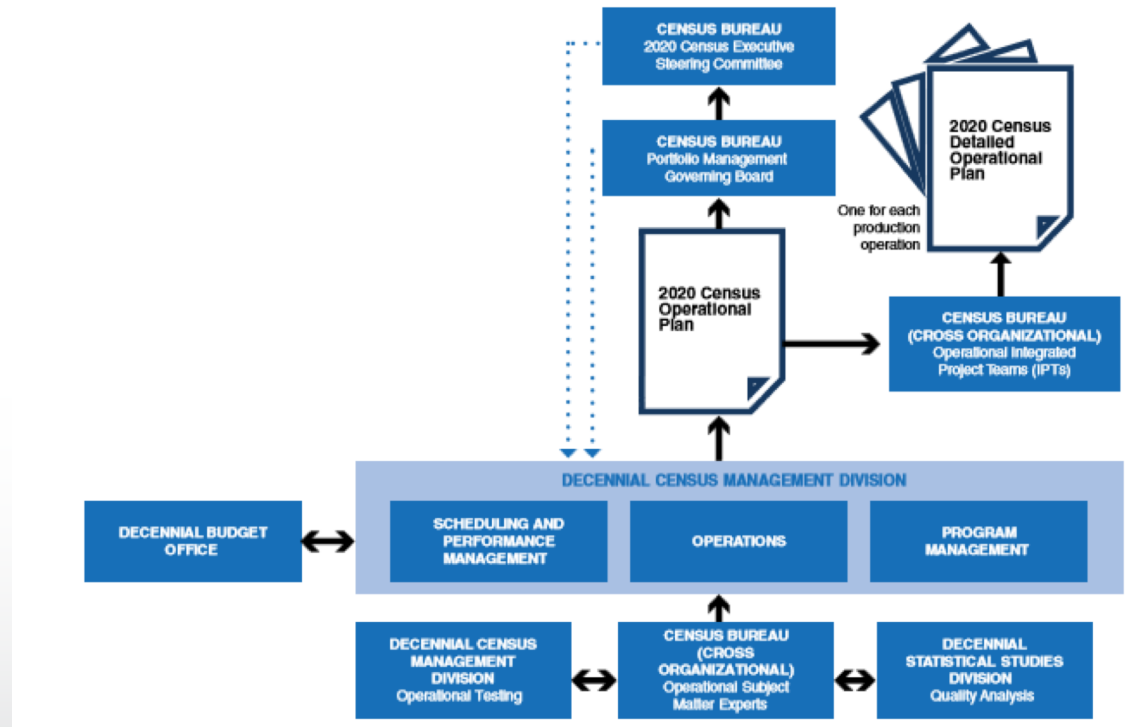
Source: U.S. Census Bureau (2017)

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The 2020 Census: 2020 Census Operational Plan 350 Decisions
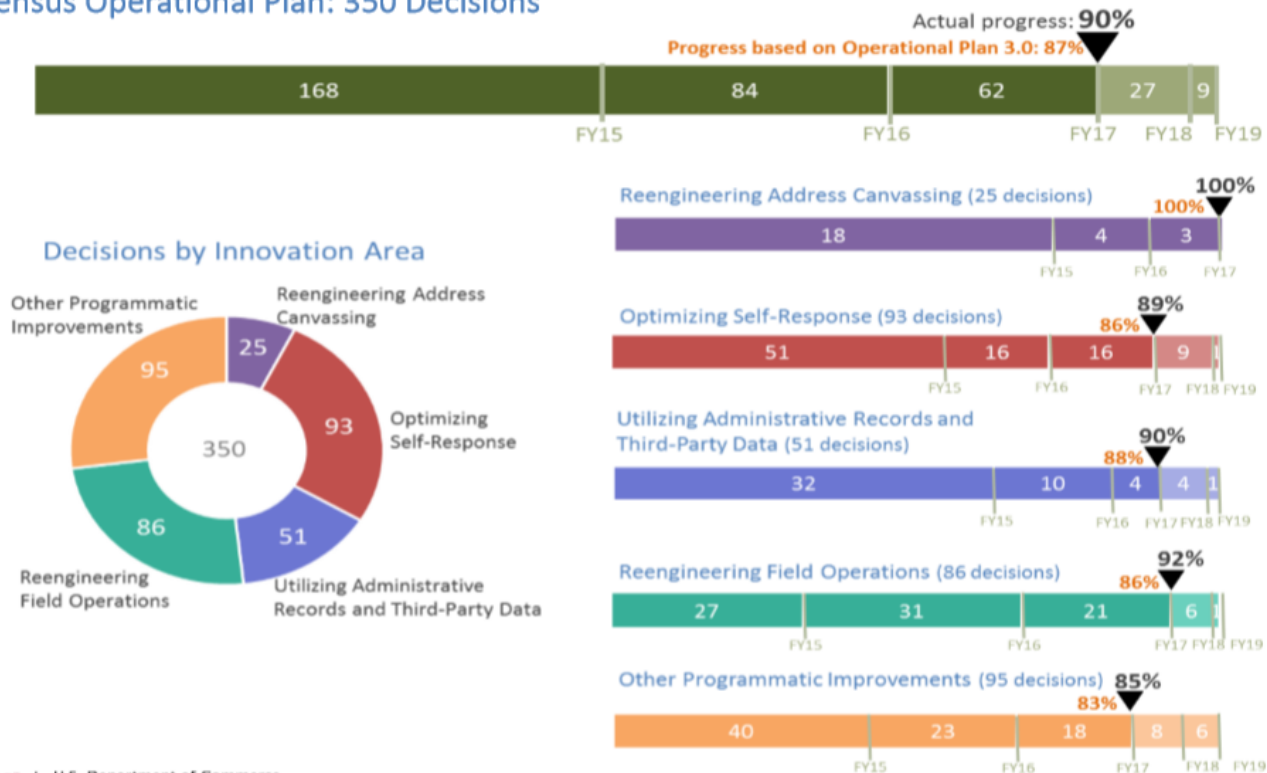
(Source: Stempowski, 2017)

2020 Census Portfolio Management Questionnaire

- See handout for copy of questionnaire
- Respondents
- Ten process areas
- One change from case study: Add short descriptions of each process area
- Phone interviews versus online questionnaire
- Challenges or lessons learned

Wellness Rating Levels

1-Not well at all	2	3	4	5-Extremely well

Maturity Rating Levels

Nonexistent
Level is defined by nothingness- no evidence of portfolio management activity, no governance, no processes and no effort to identify strategic priorities

Informal
Level is defined by beginnings - new governance, new requirements, new processes and structures, and leadership begins strategic planning
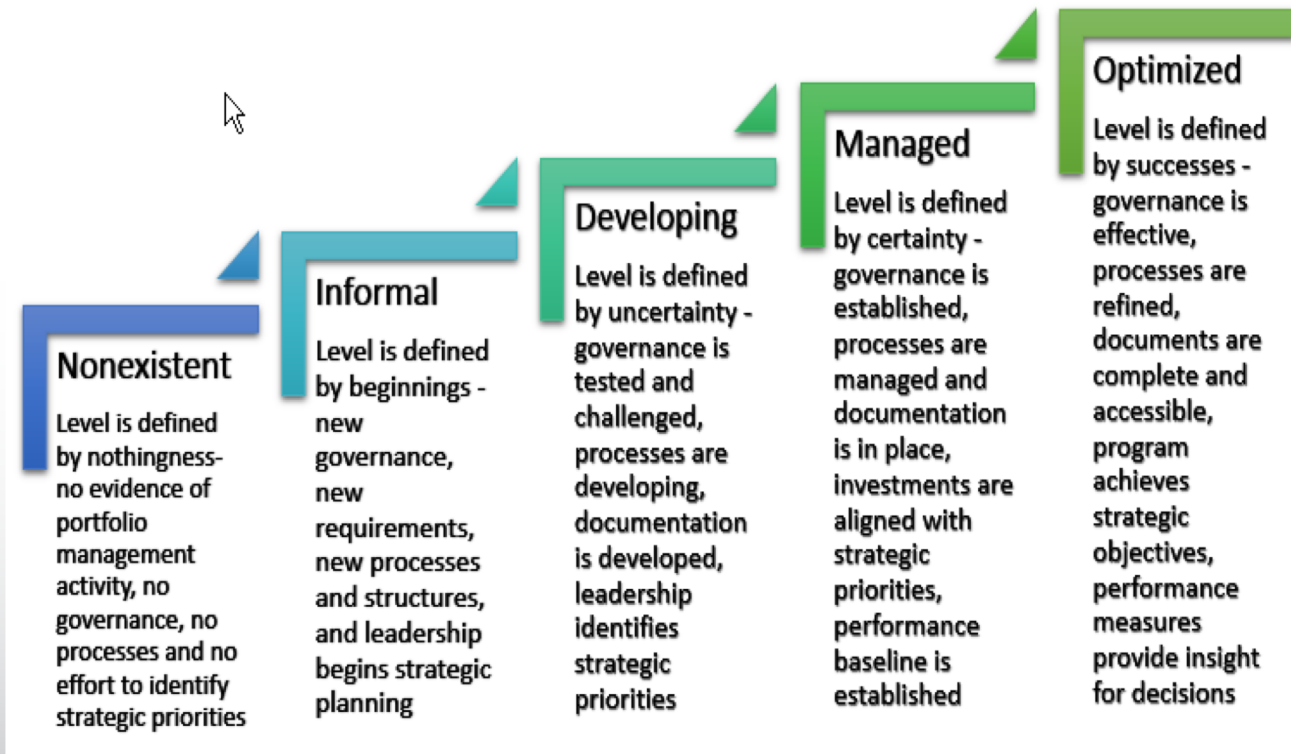
Developing
Level is defined by uncertainty - governance is tested and challenged, processes are developing, documentation is developed, leadership identifies strategic priorities

Managed
Level is defined by certainty - governance is established, processes are managed and documentation is in place, investments are aligned with strategic priorities, performance baseline is established

Optimized
Level is defined by successes - governance is effective, processes are refined, documents are complete and accessible, program achieves strategic objectives, performance measures provide insight for decisions

Portfolio Management Wellness and Maturity Ratings for 10 Processes

	Portfolio Management Governing Board (PMGB)	PMGB Members	Portfolio Management Process	Portfolio Inventory	Portfolio Management Process Documentation	Investment Management Process	Strategic Planning	Investment Performance Review	Staff Acceptance	Staff Training
■ Wellness	4.5	4.2	3.6	3.3	4.2	3.5	3.2	2.8	3.3	2.9
■ Maturity	4.5	3.8	3.8	3.4	3.9	3.4	3.2	3	3	2.8

Wellness or Maturity Rating

Rating 1 to 5

Respondent Feedback

- Overall, "a good process for the Decennial Directorate."

- While respondents generally felt like this process is functioning well, it was noted that "2020 Census is relooking at this area to improve definitions, roles and responsibilities and clarity levels of decision making."

- There were a range of comments regarding the portfolio inventory. One comments was that it is "well defined for the 2020 Census." Another felt that "many investments never come to PMGB."

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Conclusions

- The current state of the 2020 Census portfolio management program has been documented.

- Governance structures are in place and working according to plan.

- Portfolio Management professionals rated 10 key process areas as functioning well and being managed.

- Rating are expected to change as the program ramps up for 2020 Census Program operations.

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