RANKING PORTFOLIO MANAGEMENT MATURITY

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

2017 Project Management Symposium

Research Background

- Maturity Model Presentations
  - May 2016 - UMD Project Management Symposium
  - June 2016 - Meeting of the Census Bureau's Project Management Community
  - August 2016 - Census Bureau's 2016 Innovation Fair
- Development Activity
  - Socialized maturity model
  - Developed new materials—(Scorecard and Evaluation questionnaire)
  - Interviewed portfolio management professionals
  - Updated model and scorecard with findings

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Scorecard Development

Flow

- The scorecard is easy to understand and complete by the respondent

Burden

- The respondent is not overwhelmed by the scorecard

Scoring

- The answers can be logically organized into a maturity level
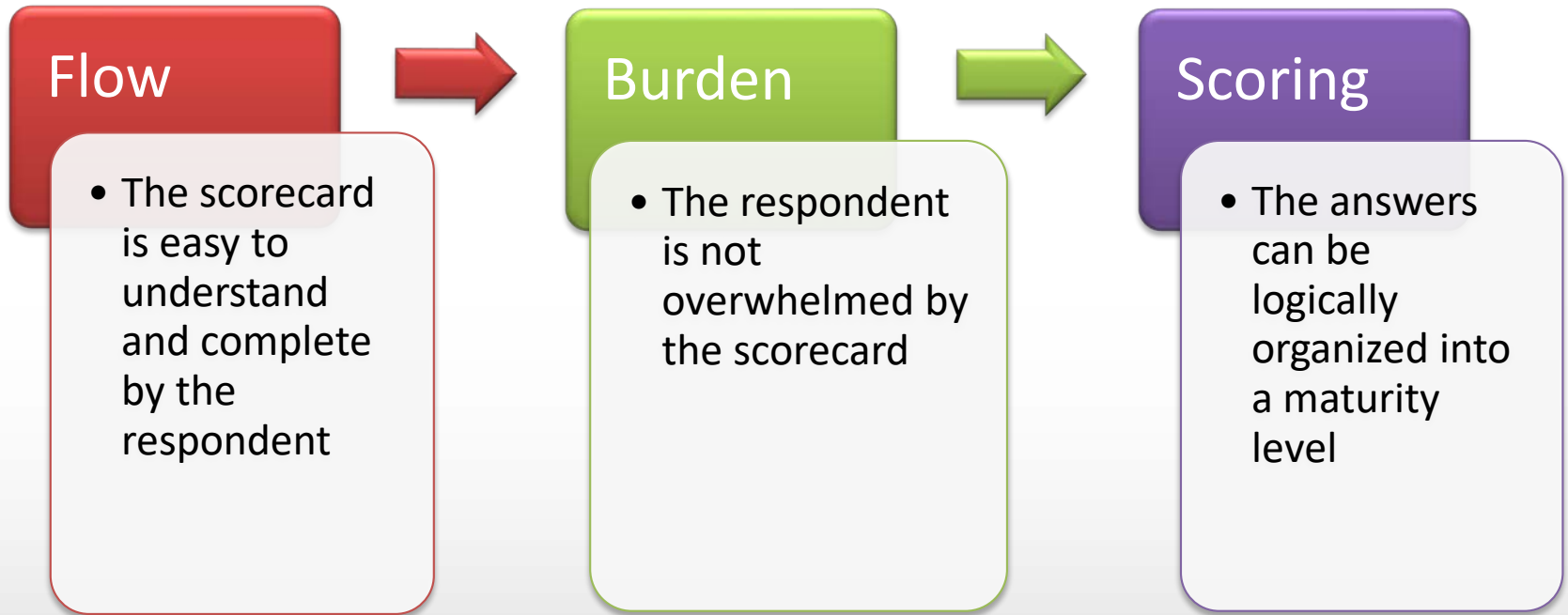
Evaluation of Model and Scorecard

Develop Materials → Schedule Participants → Interview Participants → Analyze Results → Update Model and Scorecard

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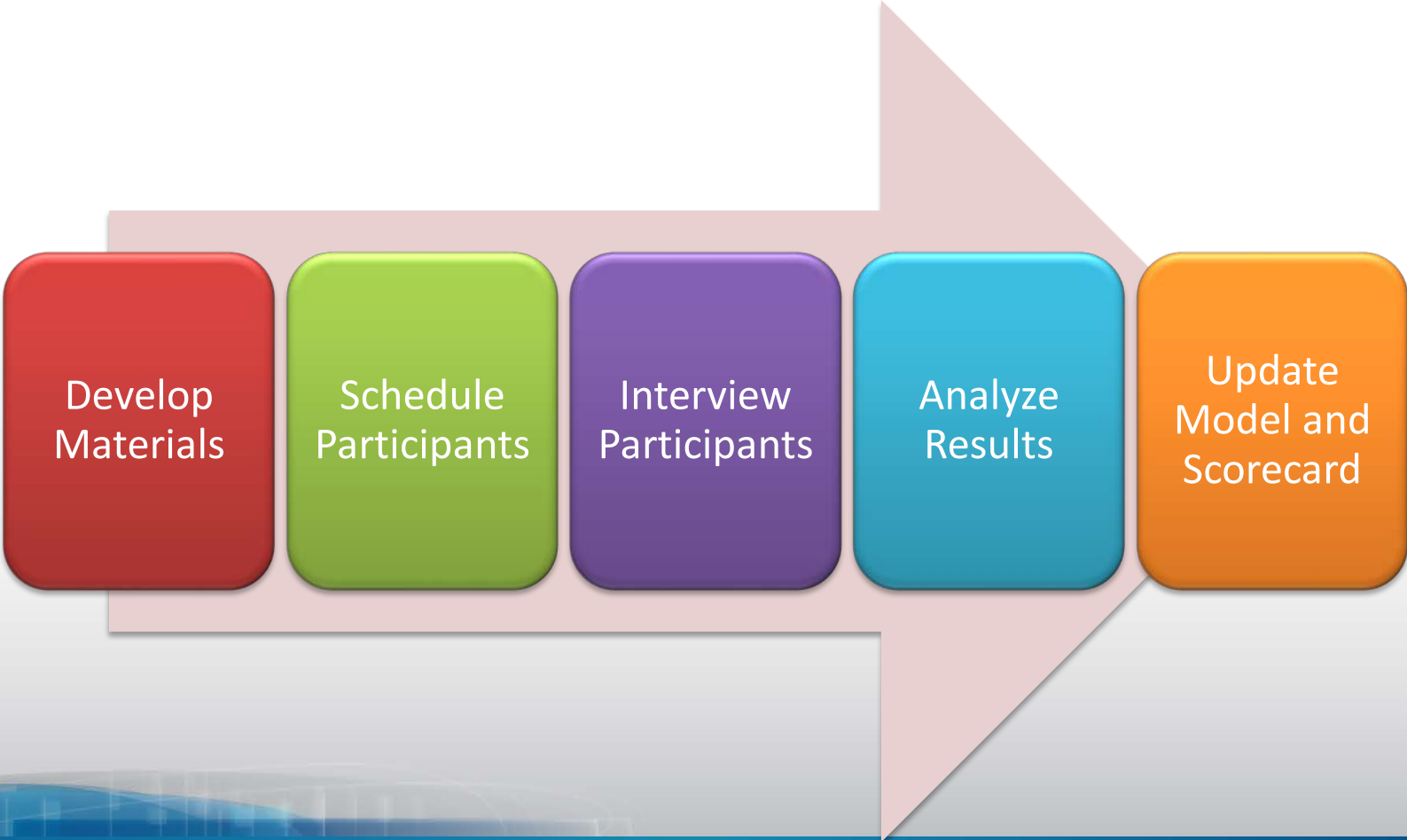
Evaluation Participants

Roles

- Support Staff
- Program Manager
- Board Chairperson\Member

Responsibilities

- IT Projects (Hardware, Software Development)
- 2020 Projects
- Enterprise Initiatives
- Operations and Maintenance
- Research (Census, Other Agencies)
- Survey Work for Other Agencies

Program Coverage

- Enterprise
- Directorate
- Division
- Program

Focus of Evaluation

Scorecard	Maturity Levels	Characteristics
• Relevant • Descriptive • Complete	• Recognizable • Distinct • Coverage	• Relevant • Descriptive • Complete

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Feedback on Scorecard

Method of Administration

Question Structure

Instructions

Statement Structure

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Feedback on Scorecard

Question Structure

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Feedback on Maturity Levels

Stand Up

Informal

Developing

Managed

Optimized
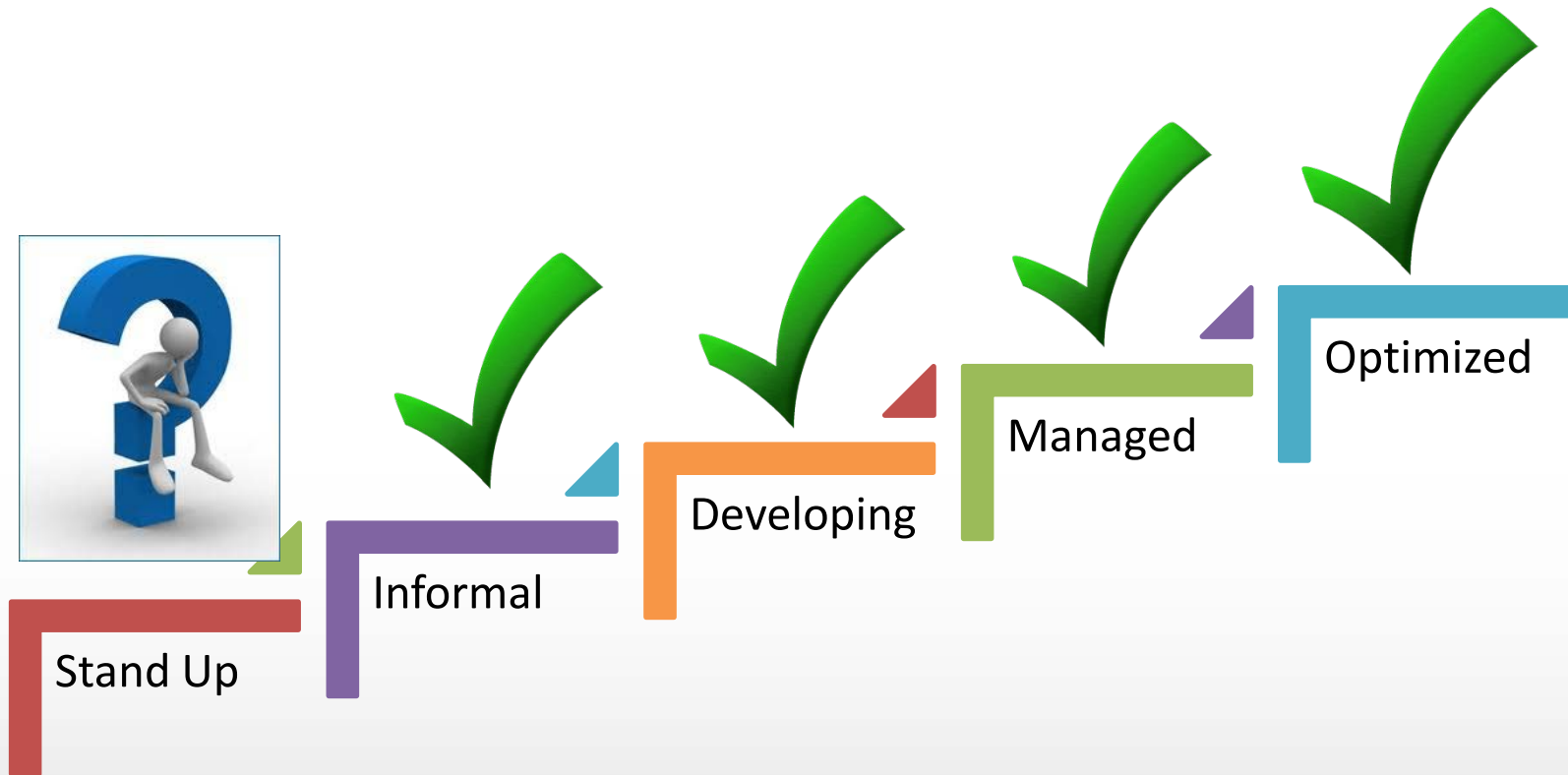
Feedback on Model Characteristics

| New	Part of Original	Deleted
• Management Tools • Risk Management	• Governance Structure • Board Members • Portfolio Management Process • Investment Portfolio • Investment Review • Status Reporting • Project Documentation • Strategic Planning • Performance Management • Strategic Priorities • Staff Acceptance • Staff Training	• Key Investments

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Insight on Maturity Growth
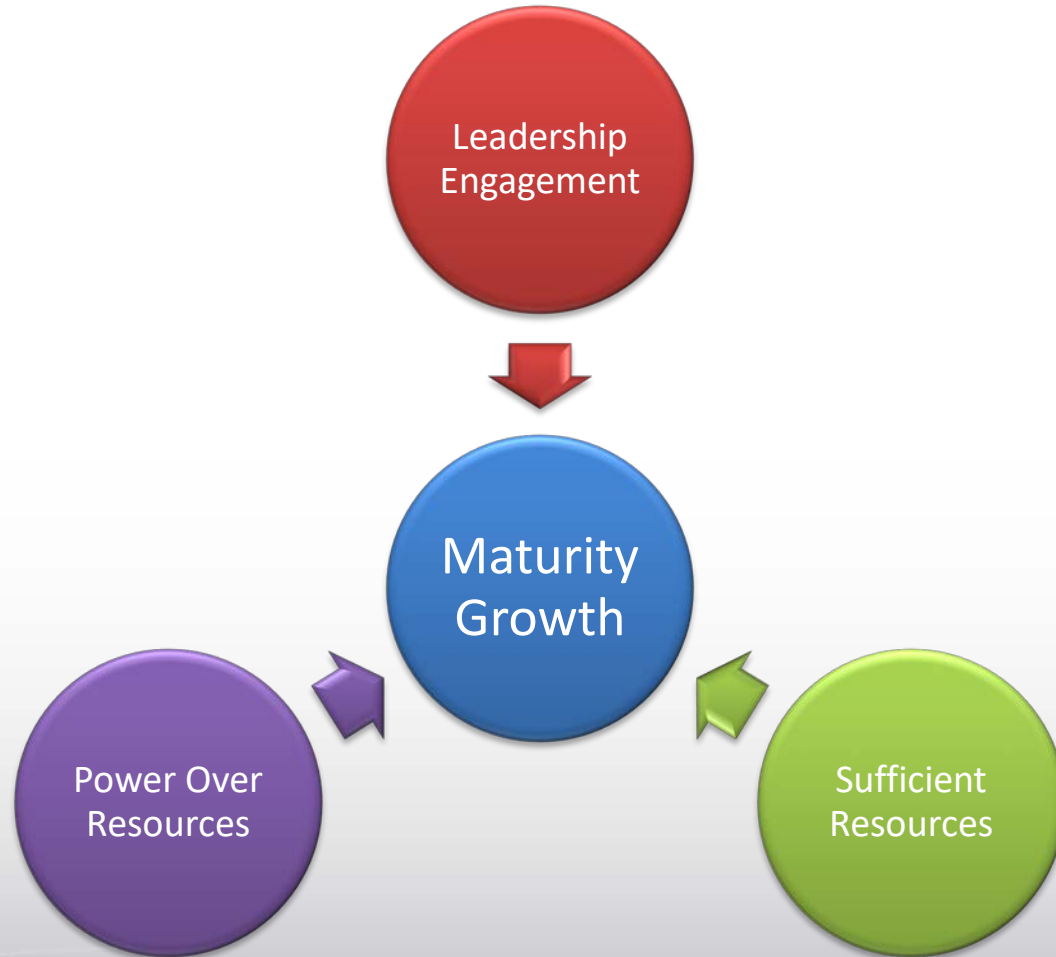
Next Steps

- Revise questions and scoring for the scorecard

- Investigate use of maturity model and scorecard as an enterprise-level tool to evaluate portfolio management at the U.S. Census Bureau

- Evaluate maturity model and scorecard using portfolio management programs outside of the U.S. Census Bureau

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Author's Contact Information

Susan Hostetter

U.S. Census Bureau

Susan.Lynn.Hostetter@census.gov

Sherri Norris

U.S. Census Bureau

Sherri.J.Norris@census.gov

United States Census Bureau

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U.S. CENSUS BUREAU
census.gov

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