Portfolio/Program/Project Management

The following diagram depicts the parent-child relationship of how projects roll-up into the larger programs. Each level provides an overview of the framework, its work products (as a function of PDP3.0) and their inter-relationships among each other.


Definitions:

- **Portfolio Management** - the selection, prioritization and control of an organization's programs and projects, in line with its strategic objectives and capacity to deliver at an organizational or functional level to optimize strategic benefits or operational efficiency. The goal is to balance the implementation of change initiatives and the maintenance of business-as-usual, while optimizing return on investment. Where projects and programs are focused on deployment of outputs, and outcomes and benefits, respectively, portfolios exist as coordinating structures to support deployment by ensuring the optimal prioritization of resources to align with strategic intent and achieve best value.

- **Program Management** – the continuous process of selecting and managing the optimum set of project-oriented initiatives that deliver maximum value
  - dynamic decision-making process
  - enables leadership to reach consensus on the best use of resources to focus on projects that are achievable and strategically aligned with goals and objective
  - generally have a multiplicity of requirements, deliverables, stakeholders, departments, and interfacing organizations interacting with the work

- **Project Management** – the application of processes, methods, skills, knowledge and experience to achieve specific project objectives according to the project acceptance criteria within agreed parameters
  - project management has final deliverables that are constrained to a narrowly defined scope, finite timescale and budget << triple constraints = time + scope + cost >>
  - a key factor that distinguishes project management from just 'management' is that it has this final deliverable and a finite timespan, unlike management which is an ongoing process
  - an improperly scoped project often leads to unforeseen/unplanned tasks and schedule delays

Program Management work product descriptions are listed on its respective page:

- Action Decision Radar (ADR) - https://community.icann.org/x/14vzC
- Portfolio Management Tool (PMT) - https://community.icann.org/x/04vzC
- Project List (PL) - https://community.icann.org/x/1YvzC
- Action Items (AIs) - https://community.icann.org/x/RgZlAg

Project Management work product descriptions:

- **Summary Timeline** – a high-level, simple Gantt view of key deliverable dates for the primary phases of the project including engagement opportunities such as ICANN meetings or dedicated face-to-face sessions. The summary timeline will typically be presented on a rolling twelve months. The duration of the project will determine if it can be displayed (typically, 12 months or less) on the slide. Updates should occur monthly or to the extent change is required, but in most cases the changes will only reflect that a month of time has passed. Changes made in the Project Plan will dictate phase or deliverable dates presented in this summary timeline. Deltas from the baseline should be represented either by a display of the original start date and/or visual representation of affected Gantt section.

- **Project Situation Report** – this work product is a copy of the project document presented in the GNSO Council’s Project List to enhance status reporting consistency to broader GNSO. It contains the project summary, scope, composition, summary, and deliverables/milestones. The lower section describes in more detail the current, planned, and completed tasks. The Status and Condition codes are the primary feature for early warning or high-risk notifications when projects may be in jeopardy. It’s complemented by an escalation procedure (described elsewhere) where At-Risk or In-Trouble projects can be properly managed.

- **Project Plan** – this work product is a detailed view of the project’s tasks and deliverables from start to finish. The project typically begins with the adoption of a group’s charter that should define the appropriate scope. The preferred tool for managing the project is a Gantt Chart style that contains all detailed tasks required to deliver on primary milestones in a manner where all dependencies and duration of each task is identified. The Gantt chart is an effective tool to demonstrate impacts to the project when key deliverable dates are in jeopardy of being missed which may impact the critical path. The consumption of this work product typically only occurs within the Working Group Leadership team. However, periodic review with the full group should occur, especially when deliverable dates are consistently being missed. In some cases, this work product should be reviewed and deliberated by the GNSO Council shortly after the charting phase of the project to ensure the plan contains realistic deliverables and delivery dates.

- **Work Plan** – this work product presents a tactical view of the tasks and deliverables imported from the Project Plan. Unlike the Gantt, it takes a simple form of a table listing the task, who is assigned, when it was assigned, due dates, and notes related to the task. In most cases, this should only contain those tasks that occur over the next several weeks and no longer than two months as to maintain focus on the current tasks. The work plan also contains a Work Breakdown Structure number to maintain continuity with the Project Plan. This work product is used frequently within the working group and managed by the leadership team.
• **Action Items** – this work product is shared with work plan and tracks additional actions usually identified in the course of group deliberations. These are typically not identified with the project plan, but should be managed with the same discipline as all identified tasks. Note though, this unplanned work can impact planned tasks as it consumes bandwidth and competes for available resources. As such, care should be exercised when creating these and consider adjusting deliverable dates if action items grow and cannot be accomplished on a timely basis. Like the Work Plan, this work product is used within the group and managed by the group’s leadership team.