

# City Portfolio-Products-Project Office (C3PO) Roadmap for the Future

## Mission of C3PO Team

The C3PO team’s mission is to execute and sustain the enabling technologies that departments depend on to render superior municipal services. This will be accomplished by executing change and building a portfolio of products in specific areas of expertise with team members focusing on becoming subject matter experts. The team is made up of experienced Product-Project Managers (PPM’s) who engage with all stakeholders to ensure the success of a complex IT projects’ implementation. All projects of sufficient complexity, duration or cost are required to be managed by a PPM or a contract PPM who is supervised by a full-time city PPM or equivalent.

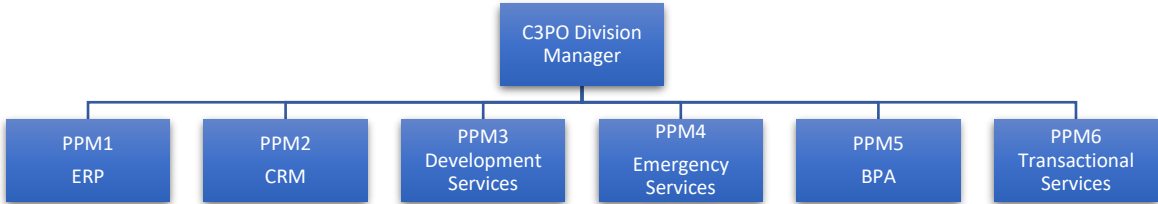
## Role of a C3PO PPM

A C3PO PPM is point person on products and projects from inception to completion and remains engaged through the lifecycle of an assigned product stack. Their roles go beyond project release. They serve as the subject matter expert for a product stake, work with stakeholders to develop a business roadmap associated with that product stack and they oversee technical aspects associated with keeping up with technology upgrades/ updates, (some) maintenance, and developing an implementation roadmap for new software releases and features that may be planned by partnering vendors.

## PPM Skill Set

The skills and background needed for a PPM at the City include flexibility, tech smarts, the ability to really listen to clients, and the ability to spot subterfuge and misdirection with vendors and subcontractors. PMI certification is a plus. They are the communication hub of their area, owning relationships with trust, shepherding, nurturing and pruning when necessary their portfolio of products.

Figure 1: C3PO Team Structure



These are the currently assigned portfolios and subject to change due to priority changes, personnel changes, reevaluation of priorities as these will evolve over time.

Currently there are 6 PPM’s on board, with 1 PPM reassigned to the EOC for the duration of COVID-19.

## Areas of ownership in C3PO

Each PPM in the organization will manage the business/technical vision and oversee execution for a specific portfolio area. These portfolio definitions are not locked-in and will periodically be re-assessed to realign on City priorities.

Each project portfolio will have a PPM owner who is a subject matter expert (SME) and maintains an array of capabilities that support like purposes. In their portfolio, they will maintain and own the

product roadmap, the life expectancy of the products, the domain experience of vendor relationships and contracts, the business goals and OKR's, and the performance and metrics of the product post-launch. Each PPM will likely have 3 to 4 major projects underway at any one time.

### C3PO Product Roadmap and Project Intake

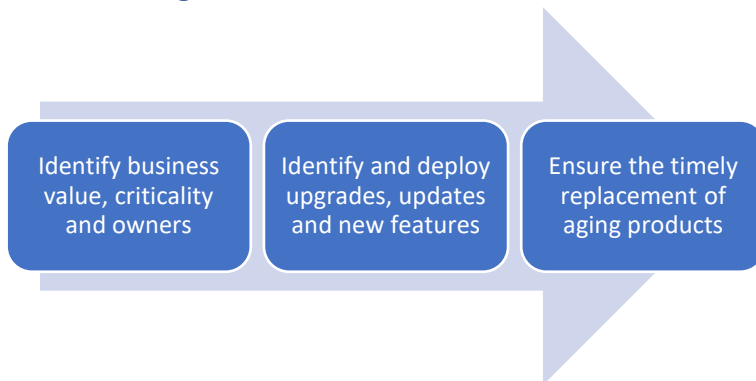
All new projects start in the ideation phase, where a need or problem is identified, and ideas are floated as to solutions. The C3PO team will drive the roadmap and engage with stakeholders to identify new products and projects. Agile strategic planning for C3PO will include:



Key questions asked by C3PO to determine involvement:

- Is it budgeted?
- Does it impact enterprise IT?
- Does it have a long tail?
- Are multiple departments impacted?

### Product Management Practice

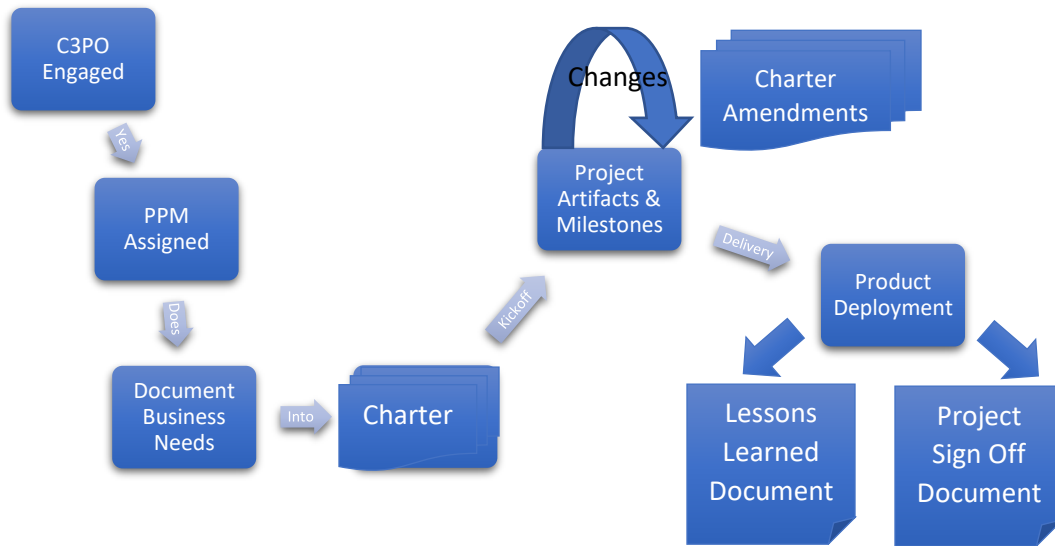


### C3PO Engagement

All technology projects that involve custom or customized software or platforms, cost over \$500k, or affect the daily jobs of many city workers across multiple departments, are to be managed by C3PO PPM's.

Similarly, any project that needs consistent and frequent oversight and planning.

Figure 2: Project Flow Diagram



When a PPM is assigned to a project, they take on ownership of the deployment of that project. Deployment on-time and on-budget are their goals once engaged. This includes the full implementation, including testing, staging and release to production. In their portfolio areas, the PPM's will monitor and constantly maintain ownership and assessing the needs of products that have been deployed.

### Metrics and Goals

Each project will have metric goals, such as number of users, phone calls answered, cases closed, etc. These goals are ongoing and will evolve over time. Although the Product Owner and the departments are the ultimate owners of metric goals and responsible to act on them, the PPM's job is to also monitor these metrics to ensure they are measuring the right things and accurately. And to then adjust any metrics as necessary, to maintain clear stewardship of their portfolio areas.

### C3PO Project Charters

The purpose of a project charter is to provide clarity, commitment, agreement and clear policy around a project. A project charter is a document that details the size, scope and planned timeline of C3PO engagement and acts as a specification of what is planned, by whom and when. The charter is the key document for all stakeholders to agree to for the project to move forward. It is our formal agreement within the City and changes will require a charter amendment. The level of detail required in a charter will vary based on its size and scope. See below.

## Standardized Documentation and Processes

In addition to project charters, the C3PO division will be responsible for creating and maintaining a set of standardized templates for product and project management that will be used not only by the C3PO team but are a pool of resources for others within the City managing projects.

It is important that before a project begins, and before a vendor is selected, that for complex and/or large projects, C3PO is engaged as early as possible.

## PPM & Product Owner: Empowered Partners

It is important to remember that C3PO consists of professional Product-Project Managers who manage the People, Processes and Technology components of our technology investments. They are *not* RFP writers, simple project trackers, or support admins. The PPM's, along with the designated Product Owner – the person who is most responsible for seeing this product deployed in the city's infrastructure, work to make as many decisions as possible to move the project along, thus allowing a more rapid implementation where the vendors or implementors don't have to wait for an answer to go 'up the chain' to senior city officials.

## Contract PPMs

When a contract project manager is used, they need to report to the C3PO Division Manager or a dedicated PPM on a regular basis providing detailed status information and awareness of potential changes to scope or timelines.

## C3PO Engaging ITD Internally on Projects

The C3PO PPM's will be the internal point person to work on behalf of the Product Owner and Departments to route requests on any project they will engage with to the following for reviews and approvals:



By handling these issues and acting as the 'router' to direct requests and inquiries, the PPM's will handle the complexity of navigating ITD, compliance and city rules on behalf of the Department(s) utilizing the product(s).

## C3PO Portfolio & Roadmap Management

By being involved in almost all major software and IT projects, this enables ITD to track investments and measure the value proposition across all of these. Product-Project Managers (PPM's) are therefore able to advise on when new investments or initiatives are needed within a product stack. As owners of their portfolio of products (see [Areas of Ownership](#) above) they are subject matter experts and are aware of similar and overlapping projects within the City's infrastructure.

PPM's will be established and recognized across the organization as the person who can make a difference within a product line. PPM's establish and work with their steering committees to envision the future and how a product line can enable that future transformation through Objectives and Key Results (OKR's).

### Training & Advising Other City Project Managers

We will never have enough Products-Projects Managers to manage all IT projects. We will offer training to departments on how to complete charters, develop and deliver against a project plan and where to store project artifacts. As experts in Product and Project management, we will teach others who take on similar jobs within their departments and provide templates and best practices as learnings.

### C3PO Training Plan

Having well trained and skilled PPM's in the C3PO team is critical to their success. The training that goes beyond "on the job" can expand the capabilities of the team, as well as ensure the growth of the members, feeding the 'leadership pipeline' of future ITD managers and executives.

Training will include:

- External resources including online and in person classes. These include:
  - PMP/CAPM – Project Management Professional Certification & Certified Associate in Project Management
  - Negotiation courses
  - Leadership courses
  - Specific technologies (e.g. Oracle, Nutanix, VMWare, etc.) as needed
- Internal training, produced by other departments at the City of San Jose
  - Purchasing basics
  - Advanced purchasing course
  - Individual training in specific departments as needed
- Internal training, built, presented and maintained by the C3PO team
  - How to create a charter
  - How to manage a project within the City of San Jose
  - How to build a roadmap for a technology portfolio
  - Specific training on products/projects by individual PPM's

### C3PO PPM Requirements

#### Education and Experience:

A Bachelor's Degree from an accredited college or university in a relevant field, AND four (4) years of progressively responsible professional/journey level experience, of which at least two (2) years of experience include lead technical work in development, implementation and maintenance of electronic business systems/solutions, or application development and/or support.

#### Acceptable Substitution

Additional years of increasingly responsible directly related work experience may be substituted for education on a year-for-year basis up to two (2) years.

Completion of a Master's Degree in a relevant field from an accredited college or university may be substituted for one (1) year of the required two (2) years of experience which include lead technical work in development, implementation and maintenance of electronic business systems/solutions or application development and/or support.

### Competencies

Ability to expertly engage with internal and external customers to build meaningful products, services, and processes.

Expertise in working across and balancing functional, technical, product owned, and customer inputs to set agreed direction.

Technical acumen to work across teams to successfully deliver and sustain products and services. Translates requirements. Creates technical solutions and integrations. Coordinates processing with business units to render superior customer experience and communication.

Strong project management ability to achieve schedule, cost, and scope/quality goals.

Experience in diverse project and product management methodologies. Ability to lead agile implementations, drive releases through sprints. Incorporate customer collaboration, and quickly resolve issues.

Experience working with third party development partners, managing contracts and change orders, and administering project resources.

Proficiency with Customer Centric Design, user stories, personas, customer journeys to create amazing customer experience.

Demonstrated success in enterprise-class product implementation.

Technical hands-on experience of applications development and operational support with Cloud Services is highly desirable.

**Project Management** – Ensures support for projects and implements agency goals and strategic objectives.

**Communication Skills** – Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills; displays openness to other people's ideas and thoughts.

**Technology Use/Management** – Uses efficient and cost-effective approaches to integrate technology into the workplace and improve program effectiveness.

**Leadership** – Leads by example; demonstrates high ethical standards; remains visible and approachable and interacts with others on a regular basis; makes informed decisions based on input from a diverse set of stakeholders; promotes a cooperative work environment, allowing others to learn from mistakes; provides motivational supports and direction.

**Conflict Management** – Uses appropriate interpersonal styles and methods to reduce tension or conflict between two or more people, by presenting the facts, analysis, and conclusions or solutions that show command of content and perspectives and interests of the audience.

**Analytical Thinking** – Approaching a problem or situation by using a logical, systematic, sequential approach.

**Change Management** – Demonstrates support for innovation and for organizational changes needed to improve the organization's effectiveness; facilitates the implementation and acceptance of change within the workplace.

## C3PO Team Roadmap & Timeline

### Immediate/Underway

- People
  - Build rapport and strengthen bonds within the C3PO team.
  - Build upon relationships with the customer base, understanding their needs
  - Build upon relationships within ITD
- Process
  - Update ITD policy, with focus on C3PO plans & needs
  - Define C3PO engagement process, when to engage, etc. Promote within ITD
  - Designate focus areas “lanes/portfolios” for C3PO staff, align with City needs
- Technology
  - Assessing tools (beyond Teams/SharePoint) to aid in C3PO’s mission
  - Build documentation standards/library for C3PO and other PM’s to utilize
  - Build upon C3PO repository of lessons learned

### Next 6 Months/Year

- People
  - Engage IT Leadership beyond ITD within the City to promote/link C3PO
  - Develop a roadmap within each PPM’s portfolio corresponding to business needs
  - Skills development for C3PO team – formalize plan and commitments
- Process
  - Develop a C3PO portal for intake, reporting, and progress reports for visibility
  - Develop metrics that measure progress against roadmap goals for all levels
  - Get updated ITD policy adopted by the City
- Technology
  - Implement standardized tools for Portfolio & Product tracking (not just Project tracking)
  - Implement dashboards for tracking major C3PO projects that are underway
  - Implement dashboards (when appropriate) for usage/tracking data on live products