the IT PMO

a handbook for federal programs

VERGYS LLC

contents.

introduction.

The **IT Program Management Office (PMO)** is essential to any federal government organization. Typically under the direction of the Office of the Chief Information Officer (OCIO), the IT PMO helps business leaders manage IT initiatives, which includes ensuring selected projects align with the organization's official strategy and business objectives. The IT PMO also tracks active projects and provides stakeholders with information they need to enhance existing systems and keep capabilities operating and up-to-date.

This e-book presents the five major components to successfully stand up, operate, and continuously improve an IT PMO: **Establish the PMO**, **Plan for Operations**, **Define Standards**, **Deliver Services**, and **Manage the PMO**. Each component has sub-processes and a list of resulting artifacts. These artifacts provide evidence that PMO and project team members have established formal processes consistent with best practices.

establish.

Establish the PMO

While most organizations have up-and-running PMOs, many forgo the necessary steps to formalize the office. A well-defined scope and formal documentation help to ensure you are headed in the right direction.

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Establish the PMO | Scope Initiation

Activities to consider:

- Authorize the standup of an enterprise IT PMO
- Develop PMO goals as they relate to the ongoing work of the organization (i.e., organizational strategies, goals, and objectives)
- Identify stakeholders and define decision-making authorities

Outputs:

- PMO Charter/Goals
- List of constraints/assumptions
- Recognized PMO Director/Lead

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Establish the PMO | Scope Planning

Activities to consider:

- Determine root cause of project management issues

- Articulate scope boundaries (i.e., types of projects, project-focused services vs. enterprise-oriented services)

- Identify and configure projects into program areas/portfolios

- Create high-level plan for PMO maturation/scope expansion

Outputs:

- Current State Assessment

- Scope Statement

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Establish the PMO | Formal Establishment

Activities to consider:

- Create initial estimate for annual PMO budget

- Refine PMO Charter including goals and objectives, responsibilities/authority, constraints/assumptions, major risks, and approvals

- Translate maturity plan into implementation milestones (e.g., short-term, mid-term, long-term)

- Obtain commitment and participation from affected stakeholders

Outputs:

- PMO Budget

- Implementation Plan

- Stakeholder Acceptance

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tip.

Get Buy-In. It is worthwhile to survey key stakeholders in the organization to understand their greatest challenges and how the PMO would be most beneficial to them. This information can form the basis of your charter and may also help secure support. Aligning with the principal stakeholders early in the process could limit resistance in further implementation steps.

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plan.

Plan for Operations

The IT PMO must secure adequate internal resources to provide useful tools and services for its customers. These resources include the management of staff, finances, procurement, and schedules, as well as other operational activities.

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Plan for Operations | PMO Framework

Activities to consider:

- Identify and document performance metrics using PMO goals/objectives

- Define interfaces with other organizational entities

- Develop concept of operations

- Ensure processes, structures, and practices allow the coordination of interactions between projects

Outputs:

- Balanced Scorecard

- PMO Framework

Plan for Operations | Staffing

Activities to consider:

- Identify and document roles and reporting relationships (i.e., project managers and functional managers)

- Acquire and assign necessary staff to the PMO

- Orient and train PMO staff

- Assess needs of projects and staff them appropriately

Outputs:

- Roles and Responsibilities Assignments

- Staffing Management Plan

- IT PMO Organizational Chart

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Plan for Operations | Budget Planning

Activities to consider:

- Determine resources – type and quantity – to achieve PMO goals
- Establish annual budget (plus out years) using resource requirements and budget estimates
- Obtain executive approval

Outputs:

- Resource Requirements
- PMO Budget

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Plan for Operations | Procurement

Activities to consider:

- Determine procurement needs and timeline
- Document requirements and identify potential resources
- Procure resources as required

Outputs:

- Independent Government Cost Estimates
- Statement of Work
- Contracts

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Plan for Operations | Schedule Development

Activities to consider:

- Identify PMO-specific activities (standards definition and service delivery) to develop overall activity list

- Identify and document interrelationships among activities

- Analyze activity sequences, duration, and resource requirements to create schedule

Outputs:

- Schedule

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Plan for Operations | Operations Planning

Activities to consider:

- Identify applicable quality standards and how to satisfy them
- Decide how to approach and plan risk management activities for the PMO
- Develop methods for cost and schedule control
- Develop process to deliver PMO services
- Determine the information and communication needs of PMO stakeholders

Outputs:

- Operational Procedures
- Communications Plan
- Risk Register

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tip.

Metrics Matter. Metrics can add legitimacy to the PMO or become a distraction as stakeholders argue about their relevance. Start with metrics that are non-controversial, impactful, and easily measured.

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define.

Define Standards

Standards serve as the basis for quality control and assurance within the IT PMO by helping the PMO to establish consistency in processes across the organization. Standards also are used to prescribe methods and activities to manage the completion of projects and the development of programs.

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Define Standards | PMLC Development

Activities to consider:

- Develop project management life cycle based on organizational requirements and industry best practices (e.g., PMBOK)

- Identify project deliverables to be completed and create supporting guidance/templates (e.g., project management plan, project schedule, quality management plan)

- Define review process for deliverables

- Determine project reporting process

- Develop change control procedures to ensure revisions to the PMLC are appropriately reviewed, approved, and incorporated

- Establish governance and decision-making processes

Outputs:

- Project Management Life Cycle

- Training Materials and Guides

- Forms and Templates

- Process Flows

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Define Standards | SDLC Development

Activities to consider:

- Develop system development life cycle based on organizational requirements and industry best practices (e.g., CMMI, IEEE)

- Identify deliverables to be completed and create supporting guidance/templates (i.e., functional requirements document, system design document, test plan)

- Define review process for deliverables

- Develop change control procedures to ensure revisions to the SDLC are appropriately reviewed, approved, and incorporated

- Define governance and decision-making processes

Outputs:

- System Development Life Cycle

- Training Materials and Guides

- Forms and Templates

- Process Flows

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tip.

Promote Agile. Gone are the days of long development lifecycles, waterfall development, and extensive requirement gathering phases. Instead find ways to incorporate rapid prototyping, scrums, customer feedback and other agile concepts into your standards.

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deliver.

Deliver Services

The successful execution of plans is what benefits the organization the PMO serves. Through individual projects and managing enterprise functions, the PMO can help the delivery of information technology.

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Deliver Services | Service Definition

Activities to consider:

- Develop catalog of project-focused services and supporting process descriptions

- Develop catalog of enterprise-oriented services and supporting process descriptions

Outputs:

- PMO Service Catalog

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Deliver Services | Service Delivery - Projects

Activities to consider:

- Manage projects according to defined PMLC/SDLC using supporting standards

- Facilitate project kickoff meetings and reviews

- Resolve project issues and escalate as needed

- Support project closeout activities

- Provide onboarding and mentor project team members

- Liaise with organizations/functional groups outside of the PMO

- Resolve resource requirements and conflicts

- Provide necessary information to project stakeholders

- Collect and disseminate performance data to stakeholders

Outputs:

- Project Artifacts

- Records, Reports, and Presentations

- Lessons Learned

- Performance Reports

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Deliver Services | Service Delivery - Enterprise

Activities to consider:

- Advocate use of project management standards to promote consistency and uniformity in project management

- Research and incorporate best practices, procedures and guidelines

- Provide ongoing training in project management disciplines

- Aid in project selection and other portfolio management activities

- Coordinate project activities and interdependencies and manage the contribution of projects to expected outcomes

- Aggregate project budgets into a portfolio estimate with execution and oversight

- Obtain high-level project milestones and maintain integrated schedule

- Audit projects for adherence to organizational standards and procedures

- Facilitate customer satisfaction surveys

- Collect and disseminate performance information to stakeholders

Outputs:

- Performance Reports

- Audit Findings

- Integrated Project Schedule (milestones)

- Customer Survey Results

- Executive Dashboard

- Project Portfolio Data

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tip.

Connect the Dots. Look for opportunities to link elements of the enterprise - budget, projects, customer satisfaction, and strategy. With the right linkages, things become clearer, easier to manage, and more transparent.

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manage.

Manage the PMO

The PMO should collect stakeholder feedback and develop lessons learned to improve delivery of services continually. Those learnings combined with thoughtful change management strategies foster process maturation.

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Manage the PMO | Change Management

Activities to consider:

- Continually monitor sponsorship and communicate PMO value proposition
- Perform and update stakeholder assessments
- Address any resistance to adoption of PMO standards
- Market PMO services throughout organization
- Develop and execute training plan

Outputs:

- Stakeholder Assessments
- PMO Marketing Materials

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Manage the PMO | Process Improvement

Activities to consider:

- Analyze performance data and customer surveys to identify areas for improvement
- Revise PMLC and SDLC according to the change control process
- Prioritize improvement activities against maturation plan and update PMO Implementation Plan and Scope Statement as needed

Outputs:

- Updated Implementation Plan
- Updated Standards
- Updated Scope Statement

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tip.

Start small. It can be attractive to address all the needs of the organization, but it is more beneficial to execute a few recommendations well. Early successes can provide the momentum to secure more resources and do much more.

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conclusion.

The IT PMO is at the intersection of strategy, IT initiatives, budget, and business objectives. And as the need for information technology grows, so does the importance of building an effective PMO. This framework is just the start of the journey.

Learn more through IT standards like the **Control Objectives for Information and Related Technologies** or **Information Technology Infrastructure Library**. For government best practices, consider the **Digital Services Playbook** by the U.S. Digital Service or **management.cio.gov**, which provides guidance related to the management and oversight of federal technology. Together, these resources provide the knowledge needed to foster stakeholder buy-in, link IT to other agency functions, and transform the PMO from paperwork hounds to measurement-driven organizations.

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