Sustaining a Transitioning Project Management Office (PMO) [1, 2]

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Abstract

What do you do when you are reduced to foundational pieces? You rebuild with what you have. According to Napoleon Hill, “Start where you stand, and work whatever tools you may have at your command and better tools will be found as you go along.” A strong foundation of templates and practices is required to cover the mechanics of project management, but unexpected personnel and organizational changes require a quick response to address the increase in project demand. A tiered project approach can be established to meet these organizational challenges.

Two areas quickly become a priority:

1. Resetting and redefining project expectations with the newly hired staff of project managers and
2. Establishing a community of practice with existing employees to shape a culture in project management.

These two avenues help fortify the importance of project management throughout the institution for initiatives while engaging and keeping constituents involved. Methods to meet these challenges will be presented along with practical applications using scenarios for continued project management success.

Introduction

Transitioning a Project Management Office (PMO) can be a daunting task including being disruptive and chaotic but also can serve as an opportunity to adjust and reset to better serve the greater good of an organization. For the purposes of this paper, we’ll focus on the case of overhauling an entire PMO, which also may be referred to simply as “office”, from the perspective

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[1] *Editor’s note: Second Editions are previously published papers that have continued relevance in today’s project management world, or which were originally published in conference proceedings or in a language other than English. Original publication acknowledged; authors retain copyright. This paper was originally presented at the 15th UT Dallas PM Symposium in May 2023. It is republished here with the permission of the author and conference organizers.*

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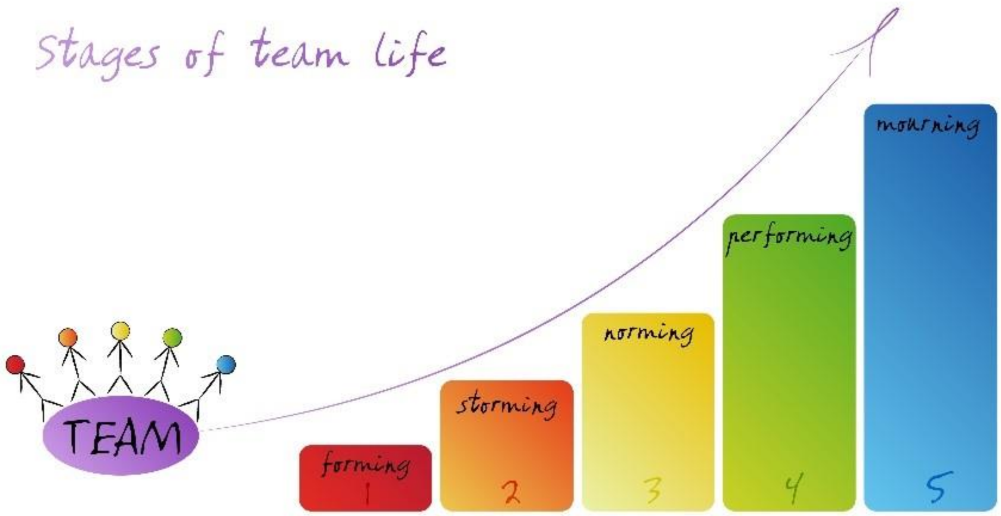
of Information Technology (I.T.) Higher Education and walk you through a few scenarios of what helps to keep a PMO moving forward through such trying times. The case outlined is based on real-life situations and will be used to illustrate a variety of components coming together to work to sustain a transiting PMO. It is important to state up front that the Information Technology functional area does not own Project Management and that it can exist in multiple areas throughout an organization as is the case as described in this paper and will be discussed in more detail later.

In the meantime, having a foundation to stand on is key during a transition since this can provide a baseline of where the starting point of work begins. In this case, coming into a PMO that was already underway for eight years, lends one to believe that basic components such as people resources, tools, and processes put in place are useful to dive into and improve upon. This is also where initial data points can be extracted that may develop further into key performance indicators (KPIs) translating to meaningful metrics. These components put together help frame and set the tone of what a PMO would become for the organization, especially in terms of practices and expectations of services to be delivered. More importantly, the collection of information will help create a more sustainable PMO that is flexible in meeting the needs of those served.

People Resources

Starting with identifying and understanding the people resources component first is key to any area within an organization since they are the ones doing or facilitating the work. This is where much time is spent in the case scenarios that follow to understand the PMO presented. The following data points were collected via an internal questionnaire as part of this case shortly after the arrival of the newly hired Director of a pre-established PMO and can also be expanded and used to help understand the current state of an office area and where opportunities may exist for improvement:

1. *Who and how many Project Managers (PM) make up the PMO?*
    - **Case Observations:** The makeup of the PMO consisted of one temporary PM Coordinator on contract and three full-time Senior PM positions, one of which was vacant and due to be filled at the time the second PMO Director was hired.
    - **Case Opportunities:** Bring the PMO to full staff and the newly hired Director up to speed.
2. *What are each of the PM roles and responsibilities?*
    - **Case Observations:**
        - PMs were leading and managing assigned projects using benchmark practices at will and not consistently.
        - All PMO staff held a project management certification and completed the organization’s project management training course.
    - **Case Opportunities:**
        - Establish uniformity and consistency across the PMO.
        - Bring the entire PMO staff to a minimal expectation level when delivering project management services.

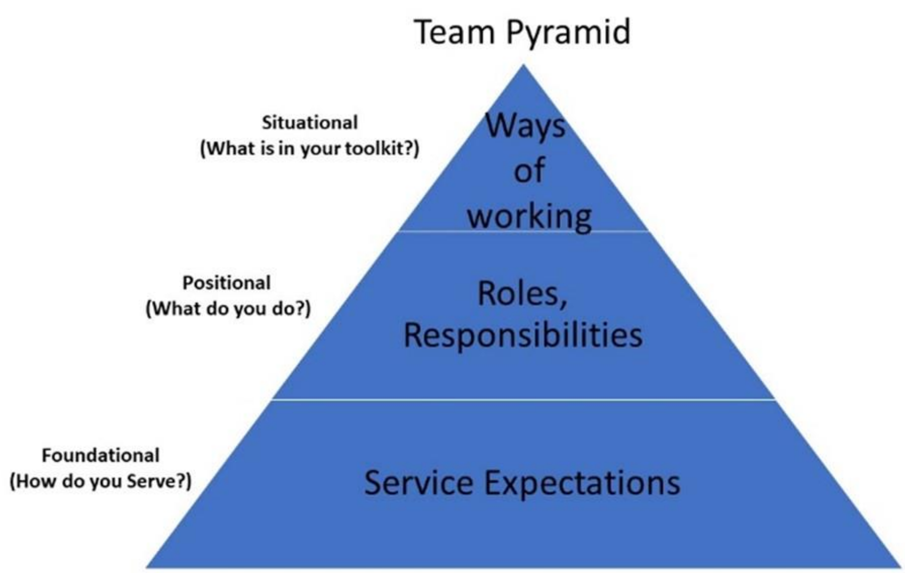


3. *How do the PMs feel regarding what is expected of them?*
   - **Observations:** Uncertainty and perhaps even frustration due to unforeseen changes
   - **Opportunities:** Redefine and clarify expectations
4. *Why do the PMs do what they do?*
   - **Observations:** Documented procedures and processes for PMs to follow may have caused services to be delivered in a way that were not flexible enough to meet the needs of customers
   - **Opportunities:** Enhance and/or improve procedures and processes that are streamlined. This can empower the PMs to some extent allowing them to self-select what and how to apply tools, techniques, frameworks, etc. that is necessary to meet the needs of the customer.
5. *Identify and understand where any gaps may exist.*
   - **Observations:** PMO personnel staff tend to work in silos
   - **Opportunities:** PMO staff can leverage cross-collaborating and team sharing to build a knowledge bank of what works well and does not
6. *Develop an action plan.*
   - **Observations:** PMO vision, service expectations, strategic plan and goals are not documented and communicated
   - **Opportunities:** Develop, document, and communicate PMO goals, service expectations, vision statement, and strategic plan

The baseline of information collected early on allows for opportunities for pre-existing staff to be visualized using the development stages of Team Development as illustrated in the diagram shown called "stages of team life" based on the original work of Bruce W. Tuckman. According to Judith Stein in "*Using the Stages of Team Development*" this framework serves as a great way for looking at your own team. Where each stage showcases its own recognizable feelings and behaviors;

having a way to identify and understand why things are happening in certain ways on your team pointing to the causes for changes in behaviors can help the team maximize its process, productivity, and performance over time.

As Judith Stein goes on to outline the importance and application of the four stages, she goes on to mention a fifth stage that is not part of Tuckman's original model which is stage 5: Termination/Ending (Mourning). Stage 5 is key for it resets the entire framework to begin again if encountered making it repeatable and reusable. As for this case this is what indeed occurred. Not only did the initial Project Manager position remain unfilled, a second position, then a third position became vacant until what was known as an office had to be re-staffed entirely. The task of offboarding and onboarding of staff will be left for the newly hired Director to work through while keeping the project portfolio balanced so as not to disrupt existing services provided to customers. At no one individual choosing the repeat use of the Framework for Team Development became more apparent as if it was on autoplay every time a newly hired member was onboarded and offboarded to the PMO.



Considering the continuous personnel changes, it is important to identify and understand positionally where the PMO stands in terms of the people that occupy the office and informs what people do in the office. Using the position in which a person holds, service expectations help to clarify the responsibilities a Project Manager will be accountable for in their role. This can be visualized in the pyramid drawing, to emphasize the power all three components have when integrated to bring about a successful team of project managers. Ways of working, roles and responsibilities and service expectations combined, can serve as key indicators on how well and quickly an office can respond to change while still moving forward. If anything occurred with a person, whereby they would not be available say due to being ill or simply out of the office for training, etc., that would trigger the entire office to be out of sync or not in balance for the day or over a set time. This would impact the work and priorities set, permeating a shift throughout the entire PMO. As a result, this prompted a noticeable opportunity to establish and fortify the foundation of identifying, documenting, and communicating service expectations for which Project Managements will be accountable.

Service Expectations

To put into context regarding this case, there is a set level of expectations in terms of service delivered to customers the PMO is to have all project managers provide so that people throughout the organization begin to see the value added in project management services. This development exercise in having a documented list of service expectations serves several purposes and provides the following output/outcomes:

1. It helps the PMO identify the list of services provided to its customers and an opportunity to fine tune and enhance such services.
2. It helps communicate the values of the PMO and allows everyone to be aligned with what is deemed important when Project Managers lead and manage projects as well as creates a common view of collegiality norms for the office.

In the scenario case as outlined, here is a sample list of service expectations provided to all project managers:

1. *Have meaningful meetings:* Develop and distribute a meeting agenda; determine meeting cadence and develop a communication plan.
2. *Be a problem-solver:* Find a path to yes with collaboration – what alternatives exist?
3. *Communicate effectively:* Clear is kind - Write the email you want to receive and actively & timely engage with those you serve.
4. *Provide proactive service:* Initiate contact with the primary stakeholder to build rapport.
5. *Be in lockstep with primary point of contact/be an incredible partner:* Sponsor(s), Subject Manager Expert (SME), Customer, and/or 3rd party PM, throughout the project.
6. *Be present and act on behalf of those you serve:* Understand and clarify the needs of those you serve by asking probing/calibrated questions (e.g., what do we do if we get off track, what are we up against, what do you see is our biggest challenge, what is the most difficult to get around).
7. *Collaborate & escalate:* Route and communicate, in a timely manner, what needs can and cannot be met; Don't be afraid to ask for help; you cannot solve every issue on your own.

8. *Follow-up with resources assigned to complete tasks:* Determine a cadence that is right for the project & resources.

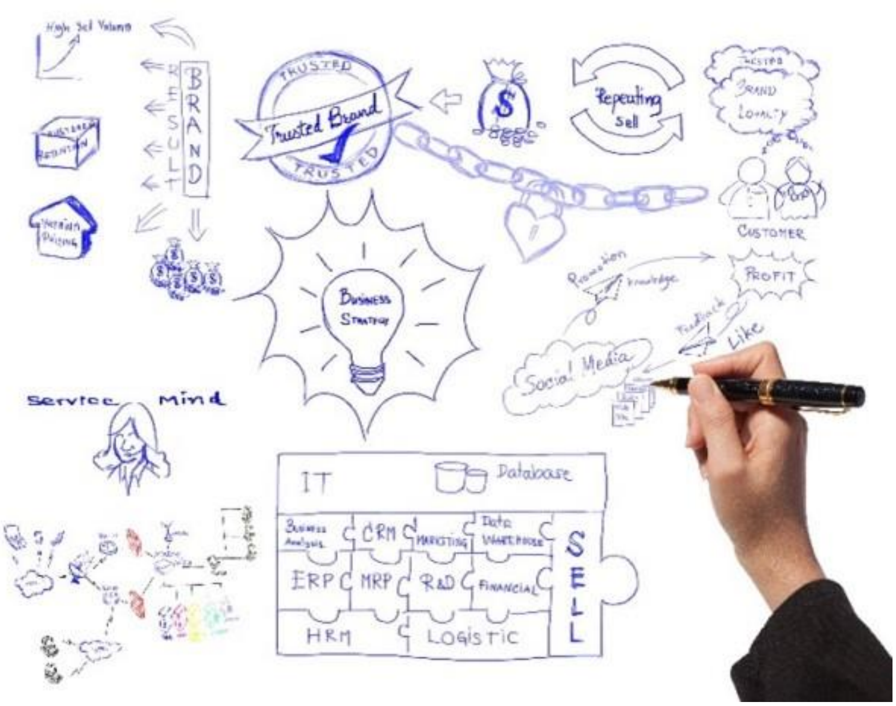
9. *Be ready to pivot when necessary:* Empathize with those you serve and partner with.

10. *Be flexible/Nimble:* Adjust & adapt while updating and making the necessary changes to a project.

11. *Help to better visualize a project, task, item, and/or changes:* Create materials &/or utilize tools in support of projects (e.g., card wall, Kanban board, project plan, timelines, diagrams, lists, charts, templates, RAID Log, etc.)

12. Develop a culture of continuous feedback throughout the life of projects.

Many of the service expectations listed above can vary in application based on how the needs of a project are interpreted by the project manager. The variation in ways of working is situational and depends on what is available in one's toolkit that can correlate to a person's skillset, experience, exposure, and knowledge. If a project manager has never been in a situation on a project that required them to use certain tools, techniques, methodologies or framework and it is necessary for the success of a project then this should be communicated and possibly addressed with training or alternative measures. Otherwise, the project may be at risk of not meeting targeted milestone dates in a timely manner.



Tools

Let's take a closer look at what tools and how they have played out in this specific case in I.T. in Higher Education. Take note that the name of specific tools, used in the generic sense of ways of working when it comes to providing Project Management services, will be kept to a minimal as not to distract or sway you but more so to bring home a specific point that the choice of tools can vary depending on the situation.

The interesting thing about working in the Education sector is the opportunity to be exposed to a plethora of software applications/tools. There tends to be a distinction sometimes in certain educational institutions where specific classification types (e.g., students, staff, faculty, administrators) have access to a different portfolio of tools. However, that's a different topic for another paper. Here we will stick with exploring what project managers are often faced with when leading and managing their own portfolio mix of projects when it comes to deciding what tools, templates, techniques, frameworks, strategies, and resources (referenced as "tool(s)" or "ways of working") to use or apply when there are so many options to choose from. Below are three typical scenarios that have played out in our I.T. PMO case.

Scenario #1: Software/Tool Familiarity

The software tool can depend on what customer you are servicing and what they have access to and are familiar with. This happens when a specific department/area within the organization has purchased their own software tool and would like it to be the choice tool for the project that the I.T. Project Manager is assigned to lead and manage. Now the I.T. Project Manager may or may not be familiar and if they are indeed unfamiliar with the tool then they must now learn, via training options available such as LinkedIn, YouTube, Vendor training/vendor software site, etc. and get up to speed. When this happens, it is key that such a skill gap is communicated, and time is allotted as part of the project schedule to accommodate the learning curve. If not communicated, then the appropriate training is not accounted for as part of the project which can derail the timeline for the project.

Scenario #2: 3rd Party Agreement/Vendor Led

Projects that include third-party vendors have contracts or agreements involved that may stipulate what software tool will be used throughout the life of a project. Here, it is clearly defined via documentation but sometimes clarity may be needed, like for all projects, on what the protocols and practices are, say, based on roles and responsibilities within the software tool. This will help everyone on a project understand who is assigned to doing what within the software tool, such as read/view only vs. edit/update and whether such permissions are for specific sections or areas of the tool. This helps to set the tempo and/or cadence by which the team will work ensuring controls are in place setting the team and project up for success.

Scenario #3: Software/Tool Uncertainty

Another situation that occurs with projects within or across an organization is when there is no chosen software tool, and an I.T. Project Manager is left to dive deeper in understanding the needs and boundaries of a project to determine what ways of working would be best utilized. As part of the planning phase of the project life cycle this can sometimes take time. The I.T. Project Manager can start off going down one path, for example, using the waterfall method then at some point begin using the agile approach. As a catch all for this type of scenario, at a minimum it may be safe to use and apply a RAID Log to the project. Using and adding this supporting file will capture the Risks, Actions (Action Items), Issues and Decisions made on a project to provide traceability and a way for record keeping in achieving project outcomes/deliverables that is constant to account for the adjustment in approaches applied.

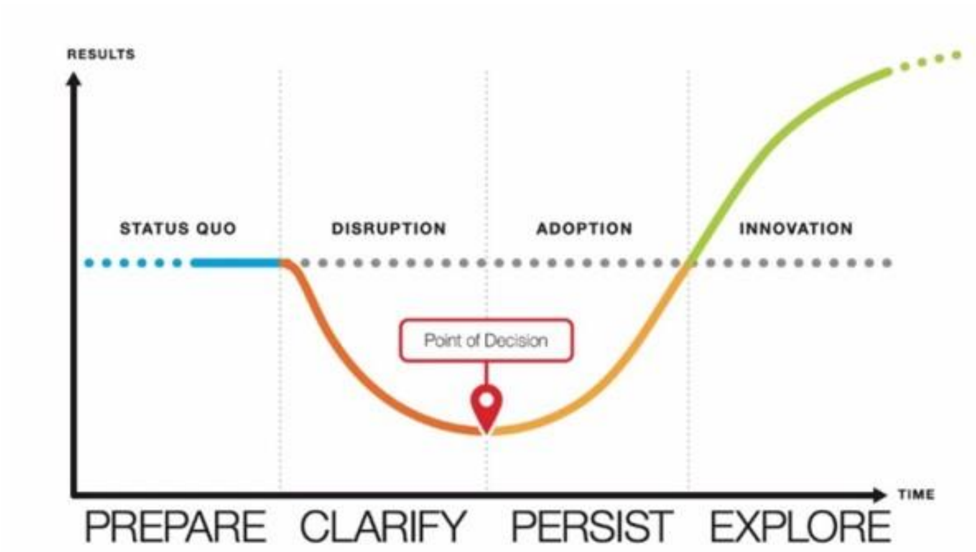
The point is when it comes to tools and many ways of working, do what is best for the customer and the project. Be aware that in some situations, the customer will want to use a specific tool, template, or technique to their liking and if everyone agrees and it works for the project go with it. However, if found to be at the detriment to the project and achieving the desired outcomes, output and/or deliverables, this may involve a bit of change management that the I.T. Project Manager is to assume responsibility for.

Change Management

Change management meaning, it will be important to inform all stakeholders by reminding or raising awareness of what the key objectives and goals are for the project at hand. If the spirit of collaborating is lost, find alternative ways to help stakeholders understand the benefits of using a particular tool and escalate to the project sponsor and/or leadership if necessary. Don’t be afraid to ask leadership for input and/or assistance. Although you are not expected as the I.T. Project Manager to solve every issue on your own, it is expected that the PM will do their due diligence in finding ways to corral the project team around the common goal and objectives, making recommendations that is best for the project. Yes, in this case, as with many projects in Higher Education, not all Project Managers are authorized to make executive decisions. Sometimes project management related decisions such as what tools to use, budgets aligned to project resources, and human capital resources are decided by committees. Decisions by committees or crowdsourcing can be a barrier when it comes to the pace of a project to plan or even stick to a schedule/timeline. Staying mindful as the Project Manager that such a barrier may exist is important and can play a role in how a project moves forward but should not minimize the role the Project Manager has in leading the project. It is more so an opportunity to refine, at various check points, the identification and understanding of what responsibilities each role resources play throughout a project.

Leading Your Team Through Change

Skillsets in relationship building, continuous engagement, and fostering an environment of care to name a few are very much necessary when it comes to managing and leading people through changes on a project. This can be challenging especially if such skills are not developed enough to be applied to a particular project and it can also be an opportunity for a Project Manager to gain, develop, or build such skills, if time permits. Either way, it is important to know that no matter what change(s) or point of disruption(s) occur during the life of a project, the Project Manager is there to keep the project moving and this includes executing due diligence to ensure people on the team are not impeding forward progress.



The four zones of the Franklin Covey, "The Change Model" as pictured, shows the following: The *Status Quo* zone depicts the point where change has not yet come or taken place, The *Disruption* zone indicates the change is coming and serves as an opportunity to clarify the change by discussing the concerns and impact via what if scenarios including the timing of when the change occurs. The *Adoption* zone reflects that the change is happening, in progress and serves as opportunity to continue to hear those that are not buying into the change, demonstrating there a light at the end of the tunnel. It is at this point when wins are celebrated, and acknowledgements of gratitude and thanks are communicated to and for those sticking it out through the change. The *Innovation* or *Better Performance* zone says that we made it through the change, this is also another opportunity to acknowledge and celebrate behavior that has gone through the change, and when lessons learned can be captured. The focus here is for "leaders to learn how to take specific actions to help team members navigate and accelerate through change". One may find that such lessons or specific actions here circles back to understanding, positionally where people are, to the questions outlined earlier to reassess the current state of a situation and even back to the Team Development Stages Framework in understanding behaviors. A few additional highlights to emphasis: allow space for all parties to freely speak to express their fears and concerns in a respectful manner in one-on-one meetings or even establishing parameters to discuss in team or project team meetings. Know also that not everyone will be able to get through or go through the change(s) with you and again as the Project Manager you will be expected to adjust and adapt through the transition through coaching sessions or even with the resources that remain. A bit of resilience and perseverance and a whole lot of patience is needed to see you and your team through change.

Processes & Practices

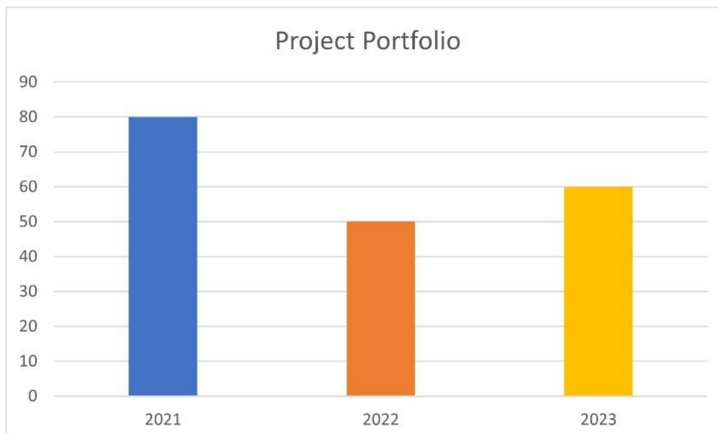
Now that the tone for change has been established, let's move on to see how this applies to the case at hand. Upon the arrival of the newly hired PMO Director, several existing PMO processes and workflows were impacted that would improve project management services to customers. The PMO at this point had completed a customer survey, therefore, preliminary data was pointing to a series of gaps within the project life cycle and needed to be addressed right away. The data indicated the following (not an exhaustive list) for which we will focus:

1. The need to restructure the PMO due to existing tension between OIT workgroups and the PMO.
2. The lack of clearly defining what constitutes and qualifies as a project is confusing.
3. The intake process was too complicated for customers to submit a project request.
4. Not all projects, including those that were circumventing the PMO project workflow, are included as part of the project portfolio for Governance visibility.
5. The time it takes to scope a project, thus holding up the project to get through the initiation and planning, to the rest of the stages of the project life cycle.
6. The effort it takes to do manual reporting for Governance (up to four different Governance Councils) is slow and time intense:
   - all active, recently (in the last 30-days) closed and open projects for three of the four Councils
   - project ranking and prioritization as well as the stoplight report for the I.T. Leadership Council

Focusing on the list of survey findings as mentioned above, the following solutions were put in place with the help of leadership, within a matter of 12 weeks:

1. Moved from manual to more streamlined automated processes.
   - For #1 listed above, restructured the PMO by way of moving the weekly OIT Project Portfolio Review meeting to a monthly meeting to align with the Council meetings listed in #6 has helped to also ease tension between OIT and the PMO.
   - For #6, the manual process using MS Excel, Access, PowerPoint and .pdf were all streamlined via automated (data points pulled directly) from the project portfolio software so users can now access their respective Council report directly from the system.
   - For #3, incorporated the project score card directly within the project portfolio software.

2. Assigned a PM from the PMO to all projects.
   - For #3 & #4 above, the PMO worked with the research team to input their projects into the project portfolio software and OIT leadership communicated out to their respective areas to ensure staff were adding their projects to the system as well.
3. Evolved the PMO from such a rigorous PMO to a tiered approach that is more flexible.
   - For #1 - #3, the tiered approach allows for anyone to submit a project request (PR) using more streamlined online forms that automatically feed into the project portfolio software intake process once submitted for a PM from the PMO to be assigned. The links to the project request forms were created and posted in various places for easy access (e.g., internal PMO Wiki page and monthly email PMO News Notices)



You will notice, #5 above is not listed along with a solution, as this is still an ongoing concern for the PMO, we have yet to address it due to the onboarding of newly hired PMs in the PMO who have been assigned pre-existing projects from PMs that have offboarded/left the organization. Although the Tiered approach has helped in providing visibility to projects that were not included before, there is still room for improving #2 above as well as how projects are defined for the PMO. Therefore, the project tiers will continue to evolve and be improved. Please note, the Tiered approach simply means how projects are sized or a project scale using a rubric for assigning projects to categories.

The project management life cycle stages have been mapped to align with the practices and processes to determine where opportunities continue to exist for improvement. As the restructuring of the PMO continues to shift due to personnel changes, the project portfolio has changed over the course of several years now. In 2021 the project portfolio consisted of 80+ active projects when there was only one vacant PM position, by 2022 the project load dropped to 50+ projects where there was a drop in PM personnel by three positions and as of 2023 active projects in the portfolio rose to over 60. Projects Managers within the PMO consistently maintain over 45% of leading/managing projects in the portfolio while the other 55% are led/managed by SMEs within other areas of the I.T. department.

Community of Practice

Having a shared community practice of Project Management across the organization is one way to foster improvement and collegiality as well as build alliances, common practices, and pull together a knowledge base of resources. As this virtual MS Teams forum is still in the infancy stage, here are a few topics presented thus far with this component launched by the I.T. PMO in conjunction with other PMO representatives across the organization from HR Training & Development, Risk Management, and an area within the Office of the Provost:

1. *Introduction to Using Microsoft Teams for Project M*anagement
2. *Women of Project Management Conference*
3. *Let's Talk Project Management Certifications*
4. *Let's Take a Tour with Project Planning & Project Tracking*
5. *Starting with the Scope Statement (equivalent to the Project Charter) building a Project Management Culture*
6. *Construction Project Management Support*

At the time of this writing, the community of practice has an internal online membership of 94 employees across the organization, comprising of I.T., non I.T., Project Managers and non-Project Managers alike. Anyone within the institution interested in project management is welcome to join.

Conclusion

In preparing to write this paper, I attended a webinar that led me to do a lookup online and found that the steps outlined for the case presented align very closely with the PMO Value Ring methodology.

The PMO Value Ring is a methodology developed by the PMO Global Alliance to support the creation, revision and operation of PMOs. It says among other things that PMOs are service providers and exist to serve their clients and should focus on being flexible to fully fit your organization needs. In addition to transformative thinking and encompassing adaptive behaviors this is what the I.T. PMO aspires to achieve. The PMO Value Ring follows eight steps:

Step 1 – Collect Expectations
Step 2 – Define the PMO Functions
Step 3 – Establish the PMO Processes
Step 4 – Define the PMO Performance Index (KPIs)
Step 5 – Define the PMO Team (headcount and competencies)
Step 6 – Assess and Plan the PMO Maturity (ID the PMOs maturity and plan its evolution)
Step 7 – Calculate the PMO ROI
Step 8 – Monitor the PMO (Performance) Value

The Greek philosopher Heraclitus said that "change is the only constant in life." It means that the world is always changing and so are people. As in the case for this paper, the future looks bright for the I.T. PMO and by the time this paper is submitted and presented the office will hopefully have onboarded and filled the last remaining PM vacant position. In doing so, processes and practices continue to improve, the project tiers will continue to evolve over time, and the selection of tools will change. Here are a few reminders that help in sustaining a transitioning PMO and remain constant as the office moves forward:

1. Create opportunities to engage people in project management for it is the people that will be with you through to the end of a project.
2. Prepare for the project team to go through the stages of the team development framework.
3. Assess the current situation by asking probing but calibrated questions to identify and understand stakeholder and customer needs.
4. Develop and periodically assess service expectations and foster an environment that includes continues feedback and feedforward.
5. Be intentional about the growth of the team by providing opportunities to build/expand positive habits, attitudes, practices, knowledge, skills, network, etc.
6. Hire individuals that are qualified, passionate and add value.

Be ready to pivot.

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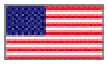

Eureka Saunders currently serves as a Senior Project Manager in the healthcare industry. Eureka has over 25 years of professional experience, spending 18 of those years in the Education sector. This is inclusive of K-12, two-year and four-year institutions both public and private. As a Certified Information Security Manager (CISM) Eureka implemented an Information Privacy and Security Program (IPSP) that spanned seven campuses which also included an awareness training program component for employees. As a Project Management Professional (PMP), Eureka has directed a PMO, implemented several enterprise-wide systems valuing over one million dollars each. In addition, as a Certified Six Sigma Green Belt (CSSGB), her structured training and professional experience operating within a Process Knowledge Center of Excellence (PKCE) has prepared her as a leader for effectively managing multifaceted projects.

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