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The Integrated PMO- IPMO
by Waffa Adam, PhD and Joe Campa
Case Study

The Integrated PMO (IPMO): The Award-winning Journey of OPG[1]

Case Study Article

By Waffa Adam and Joe Campa

Abstract

Project Management Offices (PMOs) have proven their success and worth in the industry; we do not need to argue this. PMOs have had their share of names in recent years, most known as EPMO (Enterprise PMO), APMO (Agile PMO), SPMO (Strategic PMO), DPMO (Digital PMO), etc. In a presentation for the PMI Durham Highlands Chapter, I explored the various names and expectations of these PMOs. With all these types of PMOs, there is a huge need to address the integration of practices across the multiple PMOs within an organization and the practices outside of the PMO, leading to a value stream across all functions. In this article, I will focus on exploring the integrated characteristics of an IPMO and how the integration elements, namely people, process, and technology, play a significant role in the IPMO journey. The IPMO is the function that connects all other functions, internal and external, to the IPMO. Furthermore, the article will share a case study highlighting Ontario Power Generation's (OPG) successful journey in integrating their practices, resulting in OPG being recognized as the Americas PMO of the Year for 2023 by PMO Global Alliance.

Key Words: IPMO, EPMO, APMO, DPMO, EPO, CPO, ERM

Introduction

An IPMO is the glue that holds the internal PMO functions together and aligns and integrates with the organization's culture, structure, and strategy to enable continuous value delivery. This Integrated Center of Excellence (CoE) is the one that aligns all CoEs through a "fit-for-purpose" mindset that connects people, processes, and technology to the organization model, whether the organization is functional, matrix, projected, or a combination of any. A PMO can be an integrative organizational arrangement. (Karlos, A. et al., 2011)

A successful IPMO must be perceived as supportive, adaptive, and action-oriented. The problem is that some PMOs that attempt to integrate the organization's practices and establish a holistic flow become very authoritarian in enforcing standards, which makes the rest of the organization

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perceive them as having power over them to scrutinize their work. Being authoritarian becomes a massive setback for those PMOs as other departments within the organization will fight them over authority or undermine their work. As a result, the PMO will not be able to align the organization. Organizations seeking alignment from their PMO across various functions should explore new options for the PMO reporting structure. One option is that the IPMO should report directly to the organization's CEO; the IPMO head should be a C-suite member with equal power and influence as other C-suite peers. Another option is to have the IPMO report to one of the most neutral, trusted, and influential executives in the C-suite. This individual will balance support and action among the peer department and create healthy interactions based on strategic alignment and not functional interest, allowing the business functions autonomy in delivery yet standardizing enough to improve decision-making across the organization. Any PMO has the potential to transform into an IPMO by incorporating integration components into its structure, regardless of whether it goes by the name of EPMO, APMO, DPMO, or otherwise. This article will explore the role of the IPMO and its benefits and elaborate on the various integration elements.

Elements of an Integrated PMO

One of the knowledge areas of the Project Management Body of Knowledge (PMBOK) is "project integration management," which is responsible for identifying, coordinating, and integrating the various processes within the project management process group. The PMBOK focus has been on integrating the project elements: scope, budget, time, and resources. A similar concept is introduced through the PMO with the ambitious reach that the IPMO is the function that integrates people, processes, and technology for the entire organization.

● **People**

As organizations shift directions, the successful integration of new cultural paradigms hinges on the PMO, whether implementing adaptive methodologies within the organization, navigating digital transformation, steering strategic changes relating to the funding process, or refining portfolio management and business case justification. This entails driving culture changes via a thought-through process to ensure people empowerment, leadership support, and agility in implementing change management. Further, it ensures new culture adoption by tracking progress and keeping executives informed by providing them with a realistic picture of the level of adoption.

IPMOs can help their organizations translate strategy to business outcomes, delivered through product-based organizations, portfolios, programs, or projects. There are many ideas of whether to create an IPMO separate from all other PMOs in an organization. The integrated PMO works on integrating people within the PMO and across the entire organization. The truth is that

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executives do not care what letter is tagged before a PMO as long as it is achieving the desired value and evolving as the organization's strategy evolves.

IPMOs must focus on establishing a skills excellence center to prepare employees to operate in a digital and GenAI world (workforce transition) and create avenues for training, coaching, and mentoring to enhance existing competencies and augment current skills with new skills from the industry. Focusing on the main organization asset, people and without a well-trained workforce, organizations may not progress as fast as their competition. IPMOs must build competencies in an organization's business acumen, adaptability, and political savvy. The collaboration of diverse perspectives and experiences provides independence of thinking to enhance problem-solving abilities. An IPMO should be investing in training externally and mainly customized internally to build the required caliber and provide a career path and succession planning.

- **Process**

Organizations can improve agility by aligning processes and integrating the workflow within and outside the PMO. The ability to change and scale processes become two critical components of how fast PMOs react to changes required while calculating the risk on their strategies, resource availability, and financial health. IPMOs need to ensure a speedier workflow and approval process for initiatives and be unafraid to experiment with new ways of working. Enabling nimble processing and embracing a "fit for use" approach, rather than adhering strictly to one-size-fits-all solutions, will empower these IPMOs to seamlessly integrate processes within the PMO and throughout the organization. The IPMO should focus on establishing the appropriate interaction models that identify the flow of information and potential bottlenecks for information that impede the speed of decision-making.

While establishing transparent processes for projects, programs, portfolios, and change management is the first level of maturity for integrated practices within the PMO, expanding the integration of practices beyond the PMO is pivotal to ensuring excellence in process maturity. Another crucial area is monitoring process maturity of established processes to ensure validity and applicability. The IPMO will need to develop maturity assessment and benchmarking processes and capture data to show process performance sustainability or needed improvements over time.

Establishing, supporting, and sustaining a governance structure to ensure a journey of excellence, continued integration, and continuous improvement is a central pillar for the IPMO to ensure engagement of all organization functions.

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- **Technology**

Technology is becoming part of everyday life, and for organizations, it means adapting and adopting technology to automate, explore, and speed up their operations. PMOs have struggled with how much automation, or what to automate, and whether automation will produce better results. KPIs have been generated in the past without technology; therefore, the organizations' expectation of a PMO is to leverage technology to produce better-quality KPIs relatively faster.

IPMOs should boldly experiment with new technology and assess the use of their tools suite. They need to turn the information into powerful organizational knowledge. With the power of automated processes, data, and technology, the IPMO can optimize and streamline the data and generate KPIs, driving collaboration and timeliness of decision-making ability. Some organizations can generate valuable information out of a limited set of tools. Conversely, too many tools create isolated data islands that impede the quality and speed of getting the information, impacting the decision-making process. An IPMO needs to support its organization in striking a balance and integrating the various tools in a meaningful way to produce the desired KPIs. An example of tool integration would be integrating project, program, and portfolio solutions into the financial system of the Finance department. Another example is integrating resources with the HR system of the HR department to ensure alignment and flow of information across the organization.

Furthermore, leveraging Artificial Intelligence (AI) and digitizing workflows can connect and enable the organization. This includes connecting workflow and dataflow to facilitate speedy information sharing and skills exchanges across the organization's geographic reach. It also involves connecting various methodologies and frameworks, providing teams with access to learn from one another. Additionally, enabling real-time data turns information collected by IPMOs into knowledge that enhances executives' decision-making ability, especially in benefits realization.

IPMOs should consider automating risk management flow across the organization and providing critical decisions to Enterprise Risk Management (ERM). If an organization still needs ERM, the IPMO needs to excel in the practice of projects and expand it to the entire organization. In addition, alignment of an organization's portfolio management practices including opportunities identification, prioritization, alignment to strategy, and benefit realization tracking.

About the Case Organization

Ontario Power Generation (OPG) is a global leader in clean power generation, with over 10,000 highly skilled and diversified employees dedicated to the organization's vision "to electrify life in one generation", and mission "to build a sustainable future powered by its electricity, ideas and people".

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The company is situated in Ontario, one of Canada's largest and most populous economic hubs, with over 15 million residents, and plays a pivotal role in combating climate change. Notably, its resolute closure of coal plants stands as one of the world's single most significant impacts on climate change. The company remains at the forefront of clean energy innovation, pioneering an array of initiatives, including the next wave of advanced nuclear technology.

The closure of its coal generating stations by 2014 propelled Ontario's transition toward sustainability, slashing carbon emissions from 17% to a mere 2% within two years. OPG now meets over half of Ontario's electricity needs, with an impressive 90% stemming from emissions-free sources.

OPG has a large, diverse fleet of over 160 clean energy generating plants in Canada and the United States. These plants account for over $62B in assets, including hydro, nuclear, gas, solar and biomass generating stations. Stepping boldly into the future, the company is poised to lead the charge in North America's transition to net-zero carbon emissions, with plans to debut the continent's first grid-scale small modular reactor (SMR) by 2028. At the same time, OPG is exploring other clean energy opportunities, including the potential for new hydroelectric generation, battery storage, and hydrogen production. Setting ambitious targets, OPG aims to achieve carbon neutrality by 2040, and be the catalyst for a net-zero economy by 2050.

Over the period spanning 2016 to 2024, OPG has undergone a profound transformation in its project management practices, making consistent strides towards excellence focused on the main three pillars of empowering people, continuously improving processes, and enabling technology. This dedication to excellence earned OPG accolades, including being named a finalist for the PMO of the Year, by the Project Management Institute (PMI) in 2022, and the Americas PMO of the Year award in 2023 from PMO Global Alliance (PMOGA) with Excellence Distinctions in Project Governance and Diversity and Inclusion.

The Drivers for the Change – Making the Case

As a leader in the energy industry, OPG recognized the imperative to evolve through innovation and transition away from fossil fuels towards a net-zero carbon future. A significant challenge approached: the Darlington Nuclear Refurbishment, a 10-year, $12.8B megaproject demanding integrated governance and steadfast planning and execution. At that point in time, each business unit created their own individual project management governance to the best of their knowledge. Projects were managed in silos, missing the opportunities to learn from one another and to adopt practices from the industry's best. Despite their best efforts at the time, processes were not scaled, and training was not a high priority. These elements posed a significant barrier to achieving OPG's overarching goals. This gave birth to the organization's "Project Excellence Initiative", launched

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by the CEO in 2016, which was designed to re-engineer its approach to project management and lay the necessary foundation in an effort to revolutionize the path to project excellence.

In addition to OPG's corporate vision and mission, the Enterprise Projects Organization (EPO) crafted their own vision of "building a carbon-free future through project excellence", underpinned by a mission to "deliver world-class energy projects by leveraging their diverse experience, expertise and ingenuity". Central to this vision was the alignment of projects with OPG's core values. Firstly, empowerment of its people was prioritized, fostering agility to navigate dynamic changes. Secondly, a culture of innovation and efficiency was promoted to ensure solutions resonated with organizational strategy, prioritizing customer satisfaction and shareholder value. Lastly, diverse tools, solutions, and external subject matter experts were leveraged to bolster project maturity, benchmarking, and business analytics capabilities.

In 2017, OPG aligned their strategic objectives with its distinct EPO vision and mission, and commenced with its first external Project Management maturity assessment across all business units. The results and recommendations of this assessment were grounded on the guiding principles of PMI's Project Management Body of Knowledge (PMBoK) and established a 3-year roadmap to project excellence.

By 2019, OPG established a center-led Enterprise Project Management Office (EPMO), reporting directly to the Chief Project Officer (CPO), to introduce a centralized, consistent, and tailored approach to projects. The EPMO consisted of 2 major groups: Project Services, serving as the Center of Excellence (CoE), and the Business Unit PMOs. While the Business Unit PMOs support the project delivery and execution teams directly as matrixed support staff, the CoE serves as a centralized team that supports all Business Units as an Enterprise function. It also establishes and maintains the governance, internal and external training for all PM knowledge areas and continuous improvement, and provides specialized project controls services including cost, schedule and change, risk management and estimating, data infrastructure and reporting to all Business Unit project execution divisions.

Two years after the governance was established, efforts pivoted towards implementing change management and ensuring organizational alignment, fostering peer-to-peer support and compliance with governance standards. As maturity levels increased in areas such as estimating, scheduling, and cost management, OPG's overall project maturity advanced. By late 2020 and early 2021, the focus shifted to continuous improvement, performing various self-assessments and collaboration with Business Units to better understand how they could improve further. By the close of 2021, OPG underwent a follow-up independent third-party assessment. The result ended in the EPMO being granted a rating of 'mature'. This meant having all project management processes in place and established as organizational standards, repeatable delivery, tailorable

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processes to the characteristics of each project, and formal documentation on all processes and standards.

Acting upon further improvement recommendations, OPG launched a Construction CoE and further refined their portfolio management processes. These accomplishments culminated in OPG being named one of the three finalists for PMI's "PMO of the Year" award, providing renewed commitment and focus for the year ahead.

In 2023, OPG's PMO was awarded PMOGA's prestigious "the Americas PMO of the Year " award, underscoring its relentless pursuit of excellence. However, the journey continues, with OPG steadfastly committed to further integrating best practices and expanding into green energy, poised to influence the transportation sector.

All the efforts would not have been accomplished if it wasn't for the people involved in the projects and supporting team, as well as the focused leadership, to integrate all the layers of the organization. Figure 1 below shows the strong leadership governance that OPG instituted.
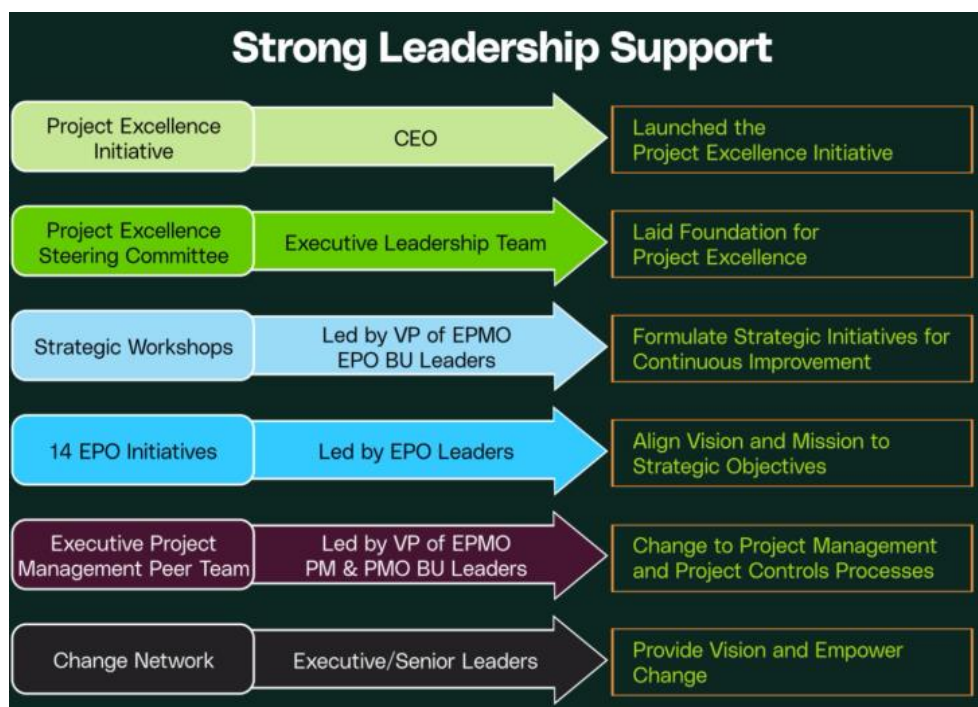

Figure 1: OPGs Organization Governance

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Making the Change happen

We have explored the elements of an integrated PMO and demonstrated how OPG was able to exemplify that throughout its journey. It has the autonomy for the business units to deliver. Yet, it also has the rigor, standards, and data to measure continuous improvement and keep everyone accountable to OPG's strategic pillars: resource, process, governance, and risk management, in addition to change management and portfolio management practices staffed with subject matter experts and governed through integrated and streamlined processes.

People

Invest in People

To ensure adoption, the team created a detailed change management plan with roles and responsibilities, and transition plans with training and coaching are in place to ensure smooth migration to the new roles and a complete understanding of the expectations of the latest roles. A career path map allows progression across project controls and project management domains; thus, staff can grow upward or pivot at any time to other sections while being provided with training tailored to support their advancement. In addition to resources within the project management and project controls pathways, the institution of change leaders empower the change and serve as a role model to others. OPG was recently named as one of the best employers in Canada for diversity, exemplifying the "OneTeam" culture as an inclusive, collaborative, and integrated approach to project management that fosters relationships and builds trust. Success in building an integrated culture is directly related to taking a unique and integral approach to executing projects.

Strong Leadership

The commitment to excellence comes from the top, starting with the CEO, who launched the Enterprise-wide "Project Excellence Initiative". The executive team is committed to enabling the EPMO to manage several committees and forums at various levels. The EPMO was empowered and supported the organization to launch 14 strategic initiatives, many of which came from the EPMO directly. The planning, forecasting, execution, and measurement were only possible because of the leadership support, empowerment, and action. OPG also partnered with local universities to secure a reliable source for future talents. The benefits of integrating people and aligning talents extend to OPG's vendor partners who benefit from the training and governance to align with OPG on project excellence.

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Process

OPG's PMO was rated 'mature' in its most recent maturity assessment for having all project management processes in place and established as organizational standards, repeatable delivery, tailorable processes to the characteristics of each project, and formal documentation on all processes and standards.

To ensure project objectives are met consistently, standard processes have been established to ensure the success of information flow and integrate work dynamics. These standard processes are built to provide adaptability to allow business units to customize what is unique to their needs. One of the most notable achievements is consolidating and integrating all organizational processes into an Enterprise-wide set of guidelines applicable to all projects in the EPO.

To further ensure adaptability, a scalable project delivery model was developed to help teams navigate challenges while executing projects by guiding the rigor applied to planning, monitoring, and controlling a project throughout its life cycle.

In addition to strengthening project, program, portfolio, and risk management processes, a change management process was established as an integral part of the change components to allow the organization to assess change impact and guide on communication and training to provide encouragement before and after the change.

All processes are supported by guides, procedures, and expert resources to guide the process. For example, there are estimators to assist in cost estimation accuracy, whereby over 300 estimates have been prepared or validated, and quantified at $21B. They also have risk specialists to define contingency amounts and track risks and opportunities throughout the project lifecycle, resulting in $140M in realized opportunities. Schedulers and cost experts guide and advise on the proper use of tools and best practices. Finally, IT specialists maintain the project management information system (PMIS), support all stakeholders, and build integrated and automated solutions as required.

Governance

From its inception, each business unit established a governance framework. Then, as part of the 'Project Excellence Initiative', the organization introduced an enterprise-wide governance framework. Governance cadence evolved to complement and align the vision of integration and how decision-making is conducted. The focus is on driving value to the organization. To achieve these objectives, multi-tiered review cycles were established to ensure all checks and balances are in place, and all stakeholders at the various levels have input, contribution, and interaction. The alignment, flow of processes, and precision of KPI reporting have allowed stakeholders to make

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factual data-driven decisions at the right time; capitalizing on opportunities while minimizing impacts from threats. Overall governance focused on financial performance, risk evaluation and action, progress against organization strategy, and pre-established KPIs.

Risk Management

Risk Management maturity increased throughout the EPO with the adoption of Opportunity Management. Prior to the "Project Excellence Initiative," projects were solely focused on threats. With this shift to proactively search for opportunities in addition to managing threats, projects were able to apply innovative thinking resulting in the materialization of identified opportunities.

As Risk Management matured, oversight committees were created for each of the Business Units as well as strategic programs like Darlington's Nuclear Refurbishment megaproject. These quarterly forums are used to present some of the most critical risks on projects within a program or portfolio, and as a medium to escalate when appropriate. These forums would also include members from Enterprise Risk Management.

OPG's EPMO developed a robust lessons learned program that has been proven effective in sharing relevant lessons across organizations and industries. Lessons from experience are implemented at all stages of the project lifecycle from front-end planning through execution and close-out. The lessons learned program has gone through a transformational experience whereby the project management culture has shifted from siloed teams and inefficiencies to the rise of a 'OneTeam' culture. The impact is evident as the lessons captured and shared across the organizations went from a mere 200 to over 5,000. By unifying their teams, it has strengthened their performance significantly across all categories including mission, adaptability, involvement and consistency.

Figure 2 below shows a summary of OPG's accomplishments across the years and the various criteria.

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Phases	Project Excellence Initiative - Initiation	Foundation and Implementation of Practices	Continuous Improvement / Benchmark
People	Limited PM Training	Standard PM and PC Training	Focused Fit-for-Purpose Training
Process	Siloed project standards	Centralized and Scalable	Integrated
Governance	Traditional Project Based		Revised Oversight structure
Risk Mgmt.	Infrequently Embedded in projects	Frequently Across projects	ERM and Lessons Learned
Benefits	Traditional Delivery	Strategic alignment	Continuous Delivery

Figure 2: OPG's Success IPMO Journey

Forward Looking – Sustainability Stage

OPG is focused on sustaining performance and continuously improving in all three elements: people, process, and technology. OPG set a foundation to ensure value is delivered across the entire organization by utilizing a Self-Assessment program developed by the World Association of Nuclear Operators (WANO), known as performance objective and criteria with the goal to serve as a benchmark and guideline to promote continuous improvement in nuclear excellence. OPG's self-assessment program is divided into three levels: divisional, departmental, and snapshot and is designed to assess all knowledge areas of the PMO with focus on maintaining quality and integration across all levels, and provides an opportunity to continuously benchmark and raise the bar on their performance and services. The EPMO focuses on sustaining the level of maturity obtained from the latest third-party maturity assessment and ensuring continuous improvements to ensure on-going value generation. OPG is also leveraging the power of artificial intelligence with 'ChatOPG', an AI-powered chatbot that uses natural language processing to communicate with users. It is designed to answer questions, provide information, and act as a personal assistant at work. Additional enhancements include providing insights and recommendations on project planning and execution, offering assistance in risk management, stakeholder communication and decision-making. Furthermore, as OPG's portfolio of projects expands, the EPMO is strengthening its position by integrating the Performance Excellence department consisting of Lessons Learned, Performance Improvement and Project Assurance teams. This strategic move aims to capitalize on key synergies, including enhancing processes and tools, integrating lessons learned into risk management, promoting continuous improvement through audits, self-assessments, and

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benchmarking, and enhancing support through centralized project assurance. Consequently, this change will rebrand Project Services as the Project eXcellence Management Office (PxMO), highlighting its vital role in advancing project excellence, prioritizing value delivery, and transcending traditional project management approaches.
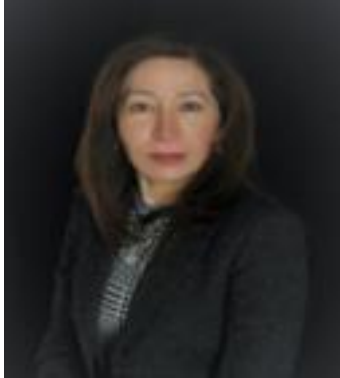
Summary

In the first part, this article explores the characteristics of the Integrated PMO (IPMO) as a function that is capable of going beyond the traditional management of projects and able to integrate people across the various PMOs and the organization in addition to the integration of processes within the PMO and across the organization. This IPMO demonstrates success in integrated governance that ties all the organizational layers and other governance committees to streamline organization delivery and performance to achieve the desired and perceived value. In the second part, the article presents OPG, a Canadian organization that exemplifies and amplifies the IPMO characteristics. OPG's successful integration journey highlights and provides examples to the practices it had in integrating people, not for projects work only but across the organizations, with detailed career paths, instituting subject matter experts; estimators, cost analysts and schedulers, risk specialists, change champions, and an empowering leadership team who is committed to the integration of "OneTeam". The company also integrated processes across risk, cost, estimating, scheduling, change, and portfolio management; in addition, to integrating tools with the business processes. Finally, an integrated, multi-tier governance that seeks the empowerment of every tier to make the right decisions at the right level at the right time.

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About the Authors

Dr. Waffa Adam

Ontario, Canada

Dr. Waffa Adam, PhD, MIT, PMP, ACP, CMP, with over two decades of expertise in Information Technology (IT) and Project Management, is a distinguished figure in the field. Throughout her illustrious career, Dr. Adam has been instrumental in driving organizational excellence across Fortune 100, midsize, and small-sized enterprises, revolutionizing project management practices and establishing Project Management Offices (PMOs) through the implementation of scalable standards and innovative solutions, significantly enhancing project delivery processes. Having navigated through diverse roles from large corporations to fledgling startups, Dr. Adam has demonstrated her prowess in managing IT strategy and operations. Her professional trajectory has seen her ascend to leadership positions within PMOs, with titles spanning from director to VP, overseeing portfolios ranging from $50 million to $1 billion in Enterprise assets for global and international entities.

Renowned as a strategist and catalyst for change, Dr. Adam has spearheaded numerous organizational transformations, fostering agile cultures and establishing Centers of Excellence (CoEs) within IT organizations. Complementing her professional endeavors, she imparts knowledge as an educator, teaching both foundational and advanced project management and IT courses at esteemed Ontario colleges and universities. Additionally, she plays a pivotal role as a curriculum lead developer, aligning educational certificates with contemporary industry demands and trends.

Dr. Adam's academic journey includes a BSc in Information Systems from DePaul University, an MIT from Northwestern University, and a PhD from SKEMA School of Business. She holds certifications as a Project Management Professional (PMP), Agile Certified Professional (ACP), Change Management Practitioner (CMP), and Lean Portfolio Management Professional (LPM), showcasing her unwavering commitment to enhancing project management standards, particularly emphasizing the value proposition of strategy execution through Portfolio Management and PMOs

Actively engaged within the Project Management Institute (PMI) community, Dr. Adam has held various leadership roles, serving as Director of Communication for the PMO Community of Practice (PMOCoP) and Regional Communication Coordinator for the PMO Local Interest Group (PMOLIG). Notably, she contributed to shaping standards for PMI-OPM3 and continues

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to contribute as a volunteer and Academic Reviewer for PMI's academic paper proposals selection process. Furthermore, Dr. Adam is a prolific contributor to project management publications and a sought-after speaker at project management chapters and forums, sharing her wealth of knowledge and insights with the broader professional community.

Joe Campa

Ontario, Canada

Joe Campa, PMP, PMI-PBA, PMI-RMP, PMI-CP, PMO-CP, is an accomplished PMO Leader and project professional with over 20 years of expertise in project management and project controls practices including program and portfolio management, with a strong focus on risk, communications and building and retaining high performing, collaborative teams. He has had the privilege of supporting two of Canada's largest clean energy infrastructure megaprojects and has played a pivotal role in the establishment of a world-class PMO, which received recognition as a finalist for the PMI PMO of the Year award in 2022 and earned the prestigious title of the Americas PMO of the Year by PMO Global Alliance in 2023. Joe is also representing his organization as a member of PMI's Global Executive Council.

In addition to Joe's extensive project experience, he has also completed a Masters Certificate in Project Management and is certified as a Project Management Professional (PMP), Professional in Business Analysis, (PMI-PBA), Risk Management Professional (PMI-RMP), Construction Professional (PMI-CP) and PMO Certified Practitioner (PMO-CP), reflecting his dedication to advancing his skills and expertise in the field. Through his participation in the PMI Leadership Institute Masters Class (LIMC), Joe has honed his leadership abilities, further enhancing his capacity to drive success in complex project environments.

Joe's passion for the projects environment extends beyond his professional career and is demonstrated by his active involvement in shaping the project management profession. At the local level, Joe served nine (9) years on his PMI Chapter Board holding various roles including Director of Marketing and Communications, Director of Governance, VP Business Operations and President. On the international stage Joe has contributed to the advancement of the profession through his facilitation of various project management and project controls training program deliveries, and developing PMI content such as 'Risk Management in Portfolios, Programs, and Projects: A Practice Guide'. Joe has also been involved in crafting questions for the PMI-PBA and PMI-CP certification exams.

Outside of PMI, Joe sits on the Durham College Project Management Program Advisory Committee to advise its program leaders on a wide range of topics that directly impact the success of students and graduates.