



## PROJECT MANAGEMENT OFFICE (PMO) CHARTER

**Approved by CITC Management**

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# TABLE OF CONTENTS

|  |    |
|--|----|
| DOCUMENT HISTORY .....                                   | ii |
| 1. EXECUTIVE SUMMARY .....                               | 1  |
| EXHIBIT A: CITC PMO .....                                | 2  |
| 2. THE CHARTER .....                                     | 3  |
| 2.1 INTRODUCTION .....                                   | 3  |
| 2.2 PMO JUSTIFICATION.....                               | 3  |
| 2.3 PMO VISION.....                                      | 3  |
| 2.4 PMO SUCCESS (A DEFINITION) .....                     | 3  |
| 2.5 PMO MISSION.....                                     | 4  |
| 2.6 PMO OBJECTIVES .....                                 | 4  |
| 2.7 PMO SERVICES.....                                    | 5  |
| 2.8 PMO CRITICAL SUCCESS FACTORS .....                   | 6  |
| 2.9 METRICS.....   | 6  |
| 2.10 REPOSITORY & TOOLS.....                             | 7  |
| 2.11 STAFFING .....                                      | 7  |
| 2.12 EXECUTIVE SPONSOR.....                              | 7  |
| 2.13 ORGANIZATIONAL STRUCTURE .....                      | 8  |
| 2.14 PMO STAKEHOLDERS .....                              | 8  |
| 2.15 NATURE OF THE PMO.....                              | 8  |
| 2.16 PROPOSED STRATEGY (BRIEF OVERVIEW).....             | 8  |
| 2.17 PMO INTERACTION WITH THE EXISTING ORGANIZATION..... | 9  |
| 2.18 FUTURE OF THE PMO .....                             | 9  |
| APPENDIX A: VALUE OF A SUCCESSFUL PMO .....              | 10 |

**APPENDIX B: STEPS TO ENHANCE PMO SUCCESS** \_\_\_\_\_ **11**

**FOCUS ON TEAMS**..... **11**

**FOCUS ON ORGANIZATION** ..... **11**

**FOCUS ON PROJECT MANAGEMENT** ..... **11**

**APPENDIX C: EXPECTED BENEFITS FOR STAKEHOLDERS** \_\_\_\_\_ **12**

**CITC MANAGEMENT (CTO & DIRECTORS)**..... **12**

**CITC LEADS / PROJECT MANAGERS**..... **12**

**CITC STAFF** ..... **12**

**CITC EXTERNAL CUSTOMERS** ..... **12**

## 1. EXECUTIVE SUMMARY

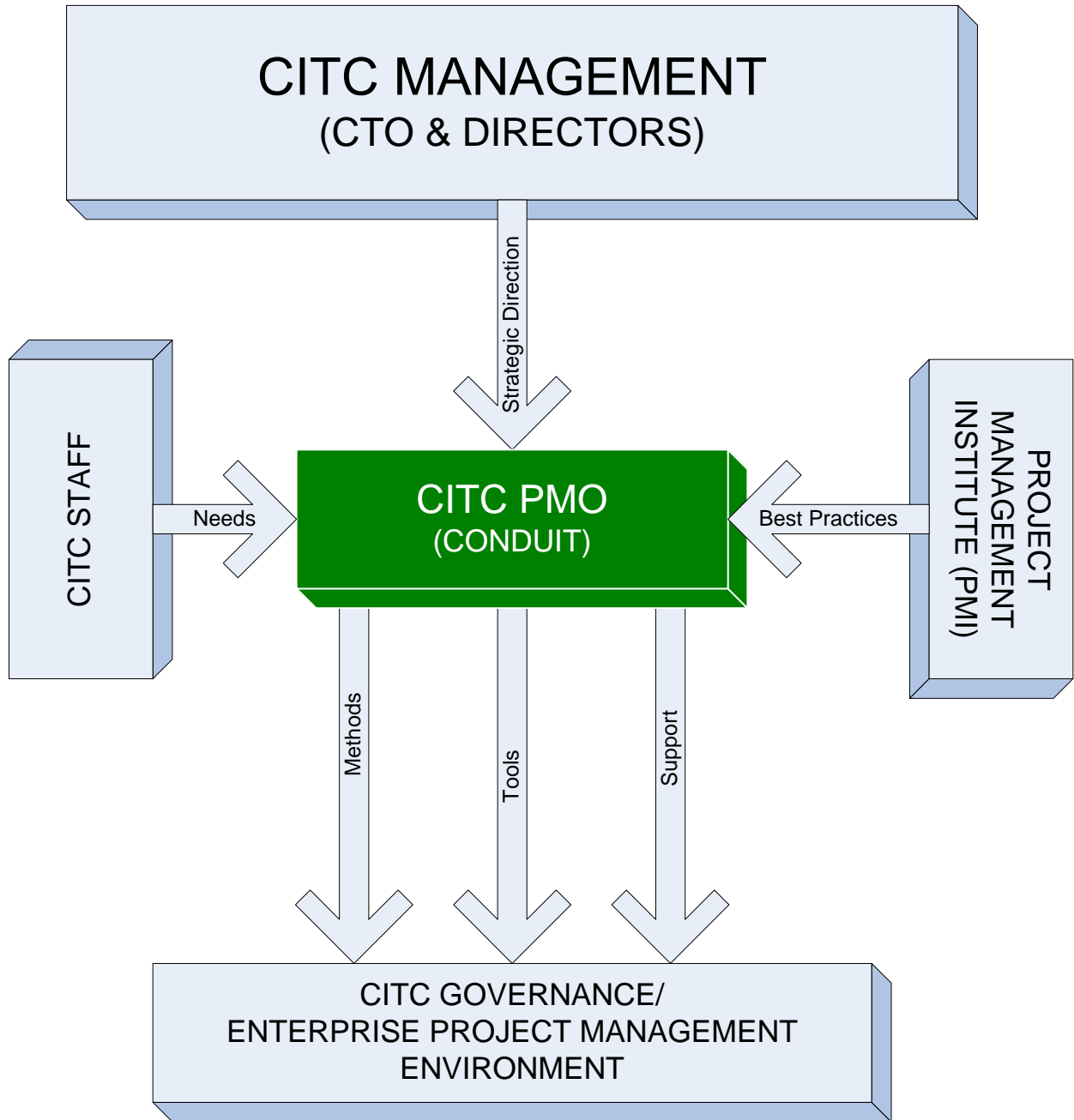
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Over the last several years, the UNT Computing & Information Technology Center (CITC) has grown in terms of people, infrastructure, and projects. In addition, increased project interdependencies require closer collaboration between groups within CITC and with external customers. A Project Management Office (PMO) was originally created in the Fall of 2002 to support the EIS project rollout. Since then, experience has shown that a departmental-wide PMO will benefit the CITC organization as a whole, and can become the model for project management enablement across the entire University in the long run. The PMO will assist CITC Management (CTO & Directors) in the evaluation, selection, and deployment of a governance system to support a comprehensive set of functions including Portfolio Management and Project Management.

- According to the Project Management Institute (PMI), the universally accepted governing body for knowledge within the profession of project management:
  - Portfolio Management is the selection and support of projects or program investments. These investments in projects are guided by the organization's strategic plan and available resources.
  - Project Management is the application of knowledge, skills, tools, and techniques to project activities in order to meet or exceed stakeholder needs and expectations from a project.
- The PMO exists to institutionalize "best practices" identified within the organization as it builds governance processes for Portfolio Management, Project Management, and other functions.
- The PMO exists to help integrate and align Project Management with business operations in order to support the organization in successfully accomplishing its mission.
- The PMO exists primarily as a service organization.
- The PMO exists to help CITC Management (and CITC customers) execute strategy.
- The PMO exists to mentor and coach project managers out in the field.
- The PMO as a self-contained entity is endorsed by the PMI.
- The PMO is widely recognized as a standard model based on overwhelming evidence among peers and industry experts in private, public, and (local / state / federal) government institutions.

**SEE EXHIBIT A: CITC PMO**

**EXHIBIT A: CITC PMO**



## **2. THE CHARTER**

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### **2.1 INTRODUCTION**

The PMO Charter was authorized to be written by CITC Management (CTO & Directors). The Charter defines its role and responsibilities relative to stakeholders inside and outside CITC.

### **2.2 PMO JUSTIFICATION**

The PMO is being created due to a need to help bring about a more formal way of managing projects and provide greater visibility and transparency into IT operations. In addition, it will assist in aligning CITC with the Texas Department of Information Resources (DIR) Texas Project Delivery Framework initiative. Among the expected benefits are:

- Empowering tools for leaders and teams.
- Appropriate alignment of projects to business needs.
- Most effective execution of projects.
- Enhanced communications.
- Heightened team collaboration.
- Optimized use of resources.
- More predictable and consistent delivery of services to customers.

**SEE APPENDIX A: VALUE OF A SUCCESSFUL PMO**

### **2.3 PMO VISION**

“Create a foundation within CITC for enhanced awareness and collaboration, increased efficiency, and more consistent delivery of the right projects at the right time with the right resources.”

### **2.4 PMO SUCCESS (A DEFINITION)**

Ultimate success is when governance processes and tools simply become the way we work together as an enterprise and conduct business with our customers. Initial success will be determined by the continued enthusiastic use of the repository and tools.

## 2.5 PMO MISSION

To assist CITC Management in the execution of strategy, the PMO will:

- Implement processes and procedures to help increase customer satisfaction.
- Establish and promote “best practices” that will aid in gaining efficiencies and achieving cost savings.
- Conduct portfolio tracking, review, and oversight.

To enable the success of project managers out in the field, the PMO will:

- Collaborate with colleagues to help ensure achievement of their goals and objectives.
- Become “embedded” in the organization and fully integrate its services with the needs, capabilities, and existing practices of its clients.
- Encourage the use of repeatable governance and project management processes with established standards and measurement criteria.
  - Provide sustainable project methodologies and tools.
  - Coordinate department-wide training, coaching, and mentoring programs.
  - Actively participate in governance activities.

## 2.6 PMO OBJECTIVES

Successful execution will result in the following objectives being achieved, benefiting CITC:

- Provide status to CITC Management, identify risks and potentials issues.
- Ensure that projects are prioritized and aligned with strategic objectives.
- Facilitate choosing the right project mix (e.g., strategic, infrastructure).
- Support improvement efforts (i.e., reduce project cycle times with better orchestration).
- Become the source of “best practices” and Project Management tools.
- Act as a competency center that provides expertise, support, and training.
- Help optimize staff and other assets across projects.
- Facilitate growing together as an Enterprise.
- Provide project oversight for the organization as a whole to help maximize project benefits.
- Become the Center of Excellence that embodies organizational best practices.
- Look to the individual teams to be responsible for ultimate project success.

## 2.7 PMO SERVICES

Specific services the PMO will provide in order to meet objectives include:

- Provide training to all staff (e.g. Portfolio Management, Project Management).
- Coach and mentor individuals.
- Provide guidance to project teams.
- Develop and implement a CITC Project Management Methodology / Framework.
- Lead the acquisition / implementation of a central repository & tools.
- Administer the repository & tools application system.
- Deploy Project Management templates.
- Develop and maintain an Executive Dashboard.
- Facilitate effective communication.
- Maintain the portfolio & projects repository.
- Provide reports to CITC Management (e.g. status, budget, schedule, ROI, training results).
- Monitor project portfolios and programs, focusing on the horizontal impact of CITC projects.
- Establish and implement metrics that measure project performance.
- Be the resident advocate for a formal Project Management discipline.
- Manage projects on an “as-needed” basis.
- Provide support to projects in trouble.
- Work with teams to understand Project Management needs and provide standards.
- Analyze, develop and implement new business processes.
- Provide the means for and / or engage in Resource Management.
- Establish and maintain a central PMO web site for use by all stakeholders.
- Research latest developments in Project Management and convey to stakeholders.
- Be the “guiding hand” for Project Management behavioural change management.

## 2.8 PMO CRITICAL SUCCESS FACTORS

The establishment of project management practices is widely viewed as a culture change initiative which requires organizational commitment. There are many factors that can help the PMO be successful within CITC in the long-term. Some of the key success factors are:

- Gain active and visible support from CITC Management (including the Executive Sponsor).
- Continue to increase understanding of the culture of CITC and UNT.
- Leverage industry standards and “best practices”.
- Adjust operations based on continuous client feedback.
- Prioritize PMO functions / services / deliverables and implement them in a time-phased manner.
- Design a scalable project management system (i.e., processes and tools).
- Develop a consistent approach to planning and managing projects across all of CITC.
- Provide Project Management training at all levels (i.e., from staff to Senior Executive).
- Promote Project Management as a core competency (i.e., to become part of CITC’s culture).
- Define and communicate the PMO’s balance between project support and control functions to ensure that the staff understands what is expected of them and what they should expect from the PMO.
- Work with CITC Management to develop a supporting rewards and recognition program for excellence in Project Management.
- The organization must recognize that some groups and individuals will embrace Project Management change better than others.

## SEE APPENDIX B: STEPS TO ENHANCE PMO SUCCESS

## 2.9 METRICS

Metrics will be developed that measure success. Key questions the metrics will answer:

- Are projects more successful over time?
- Are the project teams taking a more formal approach toward management of projects?
- Are the perceptions of the staff regarding project work changing?
- Are the projects meeting their business objectives?
- Are external customers most appropriately involved in the projects?

## **2.10 REPOSITORY & TOOLS**

A suitable database repository, application software, and automated tools will be implemented to support governance. System functionalities to be deployed over time will include:

- Demand Management – project demand tracking and approval process automation.
- Portfolio Management – project initiation, prioritization, and selection.
- Project Management – individual (approved) project execution and delivery.
- Resource Management – allocation of resources across projects.
- Financial Management – optimization of the utilization of funds across projects.

Initially, the repository will be used on a daily basis to improve communications, enhance team collaboration, gain efficiencies, and provide greater visibility into operations. In due course, the system will help in obtaining objective measurements of resource needs, overall project performance, staff perceptions, and so forth. Examples:

- Resource needs can be measured by the frequent existence of “spikes” in resource allocations over time, typically caused by multiple concurrent projects.
- Improvement in project success over time can be measured through decreases in schedule and budget variances, achievement of business objectives upon project completion, and customer feedback.
- Project Management approach can be measured by quality and timeliness of project planning documents, accuracy of time and cost estimates, and effectiveness at managing risk.
- Staff perceptions can be measured through the use of a short survey administered through the application software.

## **2.11 STAFFING**

The CITC PMO has initially been staffed with a Manager. Direct reports may be added gradually over time, depending on the need.

## **2.12 EXECUTIVE SPONSOR**

The Executive Sponsor of the PMO is the CITC Assoc. Vice President for Computing & Chief Technology Officer.

**2.13 ORGANIZATIONAL STRUCTURE**

The PMO reports to the CITC Director of Administration & Compliance – also a sponsor.

**2.14 PMO STAKEHOLDERS**

| Stakeholder                             | Relationship with PMO         |
|---|-------------------------------|
| Assoc. VP for Computing & CTO           | Executive Sponsor / Client    |
| Dir., Administration & Compliance       | Supervisor / Sponsor / Client |
| Exec. Dir., Admin. Info. Systems        | Client                        |
| Dir., Academic Computing and User Svcs. | Client                        |
| Dir., Communications Svcs.              | Client                        |
| Dir., Enterprise Systems Tech Svcs.     | Client                        |
| CITC Leads / Project Managers           | Clients                       |
| CITC Staff                              | Clients                       |
| CITC External Customers                 | Indirect Clients              |

**SEE APPENDIX C: EXPECTED BENEFITS FOR STAKEHOLDERS**

**2.15 NATURE OF THE PMO**

The CITC PMO has no intention of imposing a command-control structure. A collaborative approach will be used which relies upon the strengthening of relationships within the CITC project management community. The role of the PMO will be to provide guidance and support to its clients, act as a mentor and partner in the process, and participate in management decisions (primarily in an advisory capacity). At the same time, CITC Governance / Project Management guidelines, standards, and policies will be implemented that require various levels of compliance.

**2.16 PROPOSED STRATEGY (BRIEF OVERVIEW)**

Once the PMO Charter is approved, the proposed strategy for proceeding is:

- Install and deploy “core” functionalities of the chosen application system.
- “Layer” additional system functionalities across the organization in a structured fashion.
- Assess CITC’s overall project management maturity, determine where the organization wants to be, and develop / execute a plan to move the organization to that higher level.

- Develop a CITC Project Management methodology - “wrapped around” the application system and aligned with DIR’s Texas Project Delivery Framework initiative.
- Establish project management review processes and performance metrics.

## **2.17 PMO INTERACTION WITH THE EXISTING ORGANIZATION**

CITC consists of Executive Management, Managers, and Teams that have established a network of reporting relationships, communication channels, and inter-related goals. Once the PMO is formally established, it must be “woven into this fabric”. Following are examples of how the PMO can be integrated with the rest of the organization:

- Participate in new or existing management groups.
- Establish an on-going working relationship with all project teams.
- Attend project status meetings in an advisory capacity.
- Distribute regular reports to the department.
- Make regular contact with CITC executive leadership.
- Communicate frequently at departmental meetings.
- Host subject-based workshops and “brown bag lunches”.
- Provide a PMO web portal (i.e., containing “toolkits” as well as guidelines / standards).
- Provide a newsletter (e.g., project management “tips and tricks”).
- Collaborate with key personnel in facilitating organization-wide change.
- Chair project management committees and / or user groups.

## **2.18 FUTURE OF THE PMO**

The CITC PMO as described in this document is a starting point. A Project Management Office is seldom a static entity. It is common to implement “best practices” in one organization and then extend those enabling processes into other areas. After deploying effective governance within CITC, a possible long-term strategy would be to demonstrate the value of project management to other departments and support the rollout of a broader-based initiative -- eventually covering the entire UNT System.

The PMO Charter exists as an evolving document. Changes may be made as necessary to reflect current organizational requirements.

## APPENDIX A: VALUE OF A SUCCESSFUL PMO

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In general, the value of a common Project Management process includes:

- Reduced cycle time.
- Reduced delivery costs.
- Improved quality of project deliverables
- Early identification of project issues, budget, scope, and risks.
- Knowledge leverage and reuse.
- Improved accuracy of estimates.
- Improved people and resource management.
- Reduced time to get up to speed on new projects.
- Elimination of the thrash (i.e. false starts, self-defeating conflict, and indecision) that is so common in troubled projects.

In addition to the above, a successful PMO:

- Eliminates duplication of data and processes among Project Managers.
- Collaborates with organization staff to implement effective processes for managing all projects.
- Cultivates uncommonly high levels of cooperation.
- Institutes a new operating mode with detailed definition of process, roles, and measures.
- Promotes change from *status quo*, upstream and downstream of IT mission.
- Nurtures organizational neutrality.
- Instills a passion for the profession of Project Management's processes, practices, and tools.

## **APPENDIX B: STEPS TO ENHANCE PMO SUCCESS**

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There are steps any organization can take to enhance PMO success. Following are some general steps that can be considered:

### **FOCUS ON TEAMS**

- Define the core organization values for Project Management (i.e., “Be a team player”) and give special recognition to those who abide by these values.
- Create incentives to help staff overcome their aversion to risk.
- Provide training in matrix management.
- Train staff in business analysis skills.
- Provide workshops on effective communication.

### **FOCUS ON ORGANIZATION**

- Prioritize needs and then define immediate, mid-term, and long-term goals.
- Map proposed projects to organization goals and set realistic expectations.
- Make “Incorporation of an enterprise view in daily work” a core organization value.
- Make “Be a leader” a core organization value.

### **FOCUS ON PROJECT MANAGEMENT**

- Provide staff with both formal Project Management training and on-the-job experience (i.e., works under PMO guidance or acts as deputy Project Managers).
- Ensure that novice project team participants receive appropriate training and coaching in the chosen Project Management Methodology.
- Require thorough project pre-planning before project funds are released.
- Encourage a culture of continual improvement in Project Management skills and use a Project Management Maturity Model as an indicator of organizational growth.
- Make “Managing projects for success” a core organization value.
- Develop in-house expertise in estimating, testing, quality assurance, and business analysis.
- Apply the chosen Project Management Methodology to all projects with a varying level of rigor, depending on project size and scope.
- Manage risk proactively.
- Use a change management process whenever scope is ill-defined or likely to change.

## **APPENDIX C: EXPECTED BENEFITS FOR STAKEHOLDERS**

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### **CITC MANAGEMENT (CTO & DIRECTORS)**

- PMO provides timely feedback about project goals, status, accomplishments, and issues.
- CITC Management has an increased probability of meeting its strategic goals and greater visibility into the impacts of adding projects, removing projects, changing priorities, or shifting resources.
- CITC Management receives timely warning about critical issues (e.g., schedule delays, risks, and conflicting initiatives) and possible steps toward resolution.

### **CITC LEADS / PROJECT MANAGERS**

- Metrics are provided to ensure projects are on schedule and on budget.
- Standard processes and tools maximize chances of project success, resulting in less rework and reduced cost of product delivery.
- Project guidance helps to optimize the use of resources.
- Project execution is enhanced through the establishment of a consistent framework.
- Training, coaching and mentoring helps to move Project Managers more quickly through the learning curve.
- Standard processes and tools provide a means for Leads / Project Managers to obtain status from employees / team members in a timelier manner.

### **CITC STAFF**

- Standard processes and tools provide better communication and orchestration, resulting in efficiency gains.
- Standard processes and tools ensure that resources are not stalled -- waiting for handoffs or key decisions / issues to be resolved.
- Standard processes and tools provide a clearer understanding of tasks and priorities.

### **CITC EXTERNAL CUSTOMERS**

- Higher probability of meeting customer requirements and expectations.
- Increased customer satisfaction.