



Setting up a Project Office

Neville Turbit

Project Office, Project Management Office, Program Office, Program Management Office.....?

No matter what you call it, a central office to manage projects across an organisation, or part of an organisation, is becoming a more common occurrence. I have seen them called Program Office, Program Management Office, Project Office, Project Management Office, Project Control Centre, Project and several other variations. People have their own interpretation for each but in the end, their role is to make projects more efficient.

Project Office Role

It is essential for the success of a new Project Office that there is clear understanding before establishment, as to the role of the office, and the interaction between the office and the individual projects.

The key to successfully establish a Project or Programme Office is to gain agreement at the start of the process, as to the responsibilities. A useful and speedy technique is to workshop the possible activities with the key players, and gain consensus as to what the office is intended to do. The starting point is to create a list of possible activities, then hold a workshop to evaluate the responsibility of the office, for each activity. It is likely in some cases there will be no activity, and in other cases, the activities will need to be split down further. It is also useful if the office is not to have responsibility, to identify who does have the responsibility.

Attached is a list in no particular order. The list is not definitive. It is intended to form the basis of a review of the role. Each organisation will have specific activities that may, or may not be included in the role of a Project Office.

This matrix allows four conditions for each activity.

- **Uninvolved.** The office has no responsibility for the activity
- **Monitor.** Essentially they are aware of the activity and pass on information.
- **Influence.** Whilst the office is not responsible for the activity, there is a responsibility for the project team and the project office to work together on the particular activity.
- **Control.** The office is responsible for the activity.

On completion of this matrix, questions such as resourcing, inputs and outputs can be determined.

The Project Perfect Checklist for Project Offices

Activity	Description	Uninvolved	Monitor	Influence	Control
IT Strategic Plan	Creation of a plan (3yr to 5 yr) for the whole organisation				
IT Annual Operational Plan	Define the next level of detail focusing on the projects to be undertaken in the next year				
Project Establishment	All projects need to be logged into some central source				
Project Sizing	Create a first cut size estimate				
Project Charter	The plan for the project covering all aspects objective, scope, constraints, organisation and staffing etc.				
Budget	Setting the initial budget				
	Performance against budget				
	Budget changes				
Scope	Setting the initial scope (including exclusions)				
	Scope variations (Process for managing and management of)				
Staffing	Project organisational structure				
	Assigning staff (who?)				
	Staff movements				
	Staff personnel management				
	Skills matrix and identification of gaps				
	Resourcing contract maintenance & negotiation				
	Staff training				
	Project roles and responsibilities				
	Project team terms and conditions (allowances, rates etc.)				
	Timesheet and payment				
	Exit management				

Activity	Description	Uninvolved	Monitor	Influence	Control	
Methodology & Processes	Selection of a methodology					
	Maintenance of a methodology					
	Training					
	Maintenance and customisation of procedures					
	Maintenance of templates					
	Compliance with methodology					
	Creation of processes and procedures					
	Approval of processes and procedures					
	Standardisation and rationalisation of processes and procedures					
	Training of processes and procedures					
	Review of new methodologies					
	Tools	Selection of tools				
		Purchase of tools				
Exemptions from using tools						
Availability to teams (IT support, upgrades etc)						
Training						
Review of new tools						
Funding		Approval of expenditure (levels?)				
	Gating approvals					
Standards	Use of external standards (ISO 9000, CMM, SPI)					
	Creation of internal standards					
	QA services to project teams					
	QA approvals					
Admin Support	Assist teams with logistics (rooms, travel, photocopy etc.)					
	Produce regular reporting					
	Provide facilitators to workshops					

Activity	Description	Uninvolved	Monitor	Influence	Control
	HR issues (employee leave, payment, queries)				
	Materials (Stationary, PC's etc.)				
Planning	Compile plans (Project, phase, specific activity)				
	Approve plans				
Risk Management	Risk assessment and logging				
	Risk monitoring				
	Provide risk logging facilities				
Issue Mgmt	Creation of issue log				
	Management of issue log				
Dependencies	Identification of dependencies (other projects etc.)				
	Monitoring of dependencies				
	Identification of new dependencies				
	Liason with other teams				
Communication	External to project team (where?)				
	Inter project team				
Change Mgmt	Creation of a strategy and plan				
	Implementation of plan				
	Monitoring expectations				
Problem Escalation	Create a mechanism to escalate project issues				
	Facilitate problem escalation				
Library	Maintain standard documents				
	Maintain example documents				
	Set project documentation standards				
	Maintain project library				
	Maintain checklists for project activities (Implementation, testing, initiation)				

Activity	Description	Uninvolved	Monitor	Influence	Control
	Create and maintain a glossary				
Benefits	Identify benefits from the project				
	Quantify the benefits				
	Track benefit delivery after the project				
	Prepare cost benefit analysis				
	Produce business case				
Constraints	Identify project constraints (resource limitations, system limitations etc.)				
Reporting	Project status (what?)				
	Budget v Expenditure				
	Scope changes				
	Project overview				
	Staffing				
	Projections				
	Gantt charts				
	Earned value				
	Integration	Compliance with IT architecture (applications and technical)			
Integration with other systems					
Compliance with IT Policy (package preferred, particular vendors, etc.)					
Audit	Compliance with organisational standards				
	Ad hoc audits of projects to ensure company policy is being adhered to				
PIR	Carry out post implementation review				
	Generate action items from PIR				
	Carry out recommendations of PIR				
Acceptance & Conformance	Set conditions for acceptance of deliverables				
	Accept deliverables				

Activity	Description	Uninvolved	Monitor	Influence	Control
	Authorise exemptions to acceptance standards				
Configuration Management	Setting up Configuration Management				
	Managing software migration				
	Version control				
Mentoring	Formal mentoring programmes				
	Support roles in projects (eg supplying an experienced resource on a part time basis)				
	Special Interest Groups				
Business Interaction	Carry out Business Process Re-engineering				
	User documentation				
	User training				

Neville Turbit has had over 15 years experience as an IT consultant and almost an equal time working in Business. He is the principal of Project Perfect. Project Perfect is a project management software consulting and training organisation based in Sydney Australia.

Project Perfect sell “Project Administrator” software, which is a tool to assist organisations better manage project risks, issues, budgets, scope, documentation planning and scheduling. For more information on Project Administrator or Project Management visit www.projectperfect.com.au