



# Project Management Office (PMO) Charter

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## Information & Communication Technologies

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A decorative graphic consisting of several overlapping horizontal bars in various colors (yellow, orange, blue, purple, red) that create a stepped, staircase-like effect across the bottom of the page.

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# Executive Summary

## Purpose

The Project Management Office (PMO) has been created to serve the Enterprise Application Services (EAS) Department within the Information & Communication Technologies (ICT) Office of the University. The specific purpose of the PMO is two-fold:

1. Deliver project support to the Organization (ICT) and its clients by providing guidance in project management processes and methodologies in a manner that is efficient, consistent, and standardized.
2. Provide mentoring and coaching in an effort to raise the project management maturity level of the organization.

By providing the necessary tools and support, the PMO will look to deliver successful Information Technology (IT) projects – every time. The PMO will operate under the following guiding principal:

[The success of the PMO is derived exclusively from the success of its clients.](#)

## Goals & Objectives

In support of its mission, the PMO has the following primary goals and objectives:

1. Deliver successful IT projects
2. Build Project Management maturity at the organizational level
3. Keep Management and Project Community informed
4. Serve as the organization's authority on IT Project Management practices

The primary goals and objectives of the PMO do not include the following:

1. Originate Project Sponsorship or provide sponsorship from the Office
2. Provide or act as Technical Project Managers for a project unless charged or authorized
3. Provide or act as Functional Project Managers for a project unless charged or authorized

## Measuring Success

Metrics will measure those aspects of PMO performance that are directly related to its Goals and support its Vision and Mission. Assessments will include:

1. Improvements in project successes over time can be measured through:
  - a. Decreases in schedule and budget overruns
  - b. Client / project participant responses
2. The Project Management approach can be measured by:
  - a. Quality and timeliness of project planning documents
  - b. Accuracy of time and cost estimates
  - c. Effectiveness at mentoring and coaching project teams

## Executive Sponsorship

The Executive Sponsor is the person that is ultimately responsible for overseeing and certifying the accuracy, viability, and defensibility of the PMO at the Organizational Level. The Executive Sponsor has the following roles and responsibilities:

1. Champion the PMO
2. Provide high-level oversight, direction, and support
3. Provide escalation remedy
4. Ensure the PMO meets its goals
5. Approve major scope changes to PMO
6. Provide resources, if applicable
7. Approve PMO Charter

[The Office of the Vice President for Planning and Information Technology – CIO is the Executive Sponsor.](#)

## Executive Stakeholders

Executive Stakeholders	Name	Email
Business & Finance VP Office	Jennifer Taylor	jetaylor@nmsu.edu
Planning, Physical Resources, University Relations	Ben Woods	bwoods@nmsu.edu
President's Office	Michael V. Martin	mvm@nmsu.edu
Provost Office	Waded Cruzado-Salas	wcruzado@nmsu.edu
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## 1.0 Introduction

Information & Communication Technologies (ICT), by way of the Vice President for Planning & Information Technology, has authorized the creation of a Project Management Office (PMO). The purpose of this charter is to establish agreement on key aspects of the PMO in advance of its implementation.

This charter is, in effect, the Organizational mandate for the PMO to exist. This document defines the purpose, vision, mission, and functions of the PMO. It states who the PMO's sponsors and primary stakeholders are, the services that it offers and the staffing and support structures required to deliver those services.

### **Scope**

The PMO will reside within Enterprise Application Services (EAS) and will provide project support for all Enterprise IT projects and its Clients across the University.

*NOTE: Currently, the PMO will only support IT software projects that fall under the EAS umbrella. As the needs of the University change, the PMO will attempt to reflect those changes accordingly by realigning its scope based on the availability of resources within the PMO.*

This charter is not the project plan for implementing the PMO, but instead a statement of the PMO's function. It is also not to be interpreted as a Service Level Agreement for services and support functions provided to the University.

## 2.0 Justification

With the current implementation of an Enterprise Resource Planning (ERP) system at the University, there is a need to reevaluate the process in which IT projects are planned, queued, and executed. Currently, projects engaged by the organization are handled separately by the support group for that functional area – ergo, projects are currently run in 'silos'. However, the organization is now operating in an environment that is cross-functional in nature; where projects will have outcomes that affect one or more functional areas across the University.

For the University to be successful, projects need to be completed on-time and under-budget while increasing quality of product implemented end-user satisfaction and increasing the frequency of completed projects. Thus, there is a business need to standardize the way projects are planned, queued, and executed. The need can be fulfilled with the practice of Project Management and the creation of a Project Management Office.

## **3.0 Vision**

[Successful IT Projects. Every Time.](#)

### ***3.1 Definition of Successful IT Projects***

Based on input from Executive management, the PMO considers a project to be a complete success when the following are true:

1. Pre-defined Business Objectives and Project Goals were achieved or exceeded (i.e., the project satisfied the need that created it)
2. A high-quality product is fully implemented and utilized
3. Project delivery met or beat schedule and budget targets
4. There are multiple winners:
  - a. Project participants have pride of ownership
  - b. The customer is happy
  - c. Management has met its goals
5. Project results added value
6. Methods are in place for continual monitoring and evaluation

## **4.0 Mission**

The Project Management Office strives to enhance customer satisfaction, increase communication and standardize processes while providing valuable project support.

The PMO will operate under this guiding principal:

[The success of the PMO is derived exclusively from the success of its clients.](#)



## **5.0 Goals**

Following are the primary goals of the PMO:

1. Deliver successful IT projects
2. Build Project Management maturity at the organizational level
3. Keep Management and Project Community informed
4. Serve as the organization's authority on IT Project Management practices

Listed below is the specific work that the PMO will perform in order to meet its Goals.

### ***5.1 Deliver successful IT projects***

The PMO collaborates with ICT and stakeholders / clients to manage the IT Projects portfolio:

1. Work with Clients / UNO Data Custodians (UNO DC) / Prioritization Committee to make the IT project-selection process successful
2. Maintain and publish a master EAS IT projects schedule
3. Assist Organization and Clients with project resource management
4. Identify IT projects at risk and provide recommendations

### ***5.2 Build Project Management maturity at the organizational level***

1. Mentor project teams
2. Assist project teams in all phases of their projects from project initiation to project closure
3. Train organizational Project Managers in a full range of Project Management topics if necessary or requested
4. Serve as honest broker on all issues brought forward to the PMO by Project Managers

### **5.3 Keep Management and Project Community informed**

1. Report to CIO and UNO DC / Prioritization Committee on:
  - a. EAS IT projects – *monthly*
  - b. Metrics that measure PMO effectiveness – *annually*
  - c. Issues and opportunities – *as they arise*
2. Maintain and publish a “Lessons Learned” archive
3. Maintain the PMO Web site

### **5.4 Serve as the organization’s authority on IT Project Management Practices**

1. Set the IT Project Management standard
  - a. PMO works with an advisory group of Project Managers to update and maintain this standard
  - b. Standards are posted on the PMO Web site
2. Be the resident advocate for good Project Management practices in the organization
3. Provide Project Management tools for organization-wide use
4. Serve as the official source of project templates and other project aids

## 6.0 Metrics

Metrics should measure those aspects of PMO performance that are directly related to its Goals and support its Vision and Mission. On that basis, the following areas of focus can be used to assess PMO value to the organization.

### 6.1 Internal Review & Assessment

The PMO staff will develop or acquire the appropriate tools in which to measure PMO effectiveness. The PMO Executive Sponsor will approve such tools before they are used.

Assessments will include:

1. Improvements in project successes over time can be measured through:
  - a. Decreases in schedule and budget overruns
  - b. Client / project participant responses
2. The Project Management approach can be measured by:
  - a. Quality and timeliness of project planning documents
  - b. Accuracy of time and cost estimates
  - c. Effectiveness at mentoring and coaching project teams

The PMO, with input from Clients, will be responsible for the gathering of performance metrics.

### 6.2 Reporting

The PMO will provide the following regular reports:

Report Type	Recipient Name	Frequency
Project Queue Report	CIO, UNO DC / Prioritization Committee	Monthly
PMO Update Report	CIO, UNO DC / Prioritization Committee	Quarterly
PMO Review Report	CIO	Annual
Project Lessons Learned	Archive / Web Site	As Received from Projects

## 7.0 Services

The PMO will assist with IT projects and enforce Project Management standards.

1. If, on request, the PMO is *charged with managing a project*.
  - a. Project Sponsors make their requests to the PMO. PMO, ICT, and UNO DC collaborate to decide where PMO resources should be allocated
    - i. PMO provides Project Management services for the project
    - ii. PMO is accountable for successful project delivery
    - iii. PMO deals directly with the Project Sponsor
    - iv. PMO enforces its Project Management standards in these projects
    - v. PMO will directly manage resources assigned or attached to project
2. If, on request, the PMO is *asked to assist and provide project support*.
  - a. Project Sponsors make their requests to the PMO. PMO, ICT, and UNO DC collaborate to decide where PMO resources should be allocated
    - i. Department provides the Project Manager for the project
    - ii. PMO provides guidance to the Project Manager but under normal circumstances would not provide direct Project Management services
    - iii. PMO oversees successful project delivery
    - iv. PMO deals directly with the Project Sponsor and Project Manager
    - v. PMO enforces its Project Management standards in these projects

In addition, the PMO:

1. Provides Business Analysis services (e.g., Requirements Analysis, Joint Application -Development sessions) on request.
2. Performs risk audits on request

## **8.0 Key Success Factors**

If the PMO is to be successful, there are several key issues that must be addressed. The success of projects, in general, all rely on the following factors being implemented: the integration of client, implementer, and software vendor goals and plans, constant management of the project's scope, and finally a method for gaining visibility into project health at all levels throughout the life of the project.

Moving from a single project perspective to a more holistic perspective, the following factors will be absolutely critical to the success of the PMO.

1. Executive Support
2. Effective Data Custodian Committee / Prioritization Committee
3. Compelling Business Case
4. Agreement to Requirements and Scope
5. User Involvement & Collaboration
6. Resource Alignment Reflective of Current Need
7. Management of Expectations
8. Strong Project Management Infrastructure
  - a. Minimal Scope Creep
  - b. Strong Change Control Process
  - c. Standardized Project Management Methodology
9. Ability to Measure and Report

### **8.1 Barriers to Success**

In addition to the items listed above, the following barriers have been identified as opportunities to address when considering the implementation of a PMO as they often lead to difficulty and resistance in acceptance.

1. Unclear purpose - not well defined or communicated
2. No executive buy-in
3. PMO is seen as an overhead or marketing function
4. Unrealistic expectations that the PMO is a 'silver bullet'; giving a quick fix to core business-level problems
5. PMO is seen as too authoritative, or perceived as a threat
6. Politics and power struggles
7. Hard to prove value

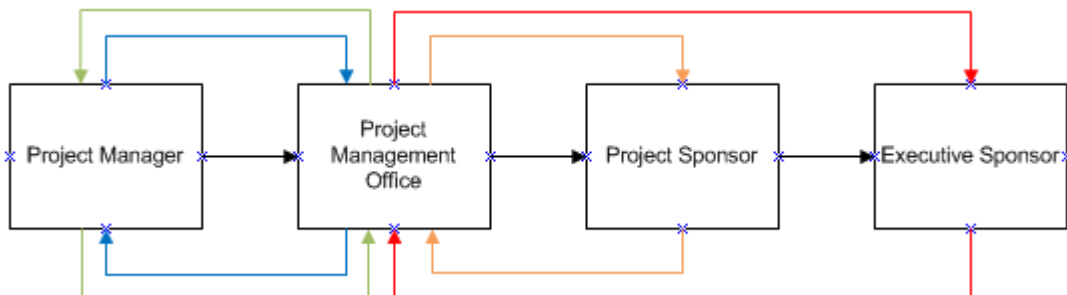
## 9.0 Escalation Model

The PMO will implement an escalation model that will allow project issues to be raised to higher authorities for timely resolutions. An escalation process ensures that the next level of management is informed (within a specific amount of time) if an issue cannot be resolved at a lower level. In this function, the PMO will act as a third party by escalating issues based on the following criteria:

1. PMO Standards are not being enforced (Project Management Methodologies)
2. Request for escalation by a Project Manager
3. The PMO identifies an adverse risk to a project

As a third party, the PMO will attempt to arbitrate issues prior to escalating to the next level in the chain. If a remedy is not possible, the issue will be escalated and documented by the PMO.

The escalation path is as follows below:



Level 1 – Project Manager escalates issue to PMO. The PMO will attempt to resolve the issue with help from the Project Manager and Clients. Escalation will be formally documented and disseminated.

Level 2 – Issue cannot be resolved and will be escalated by the PMO to the Project Sponsor for remedy. Escalation and remedy will be formally documented and disseminated.

Level 3 – Issue cannot be resolved at the Project Sponsor level. PMO will escalate the issue to the Executive Sponsor for remedy. Escalation and remedy will be formally documented and disseminated.

## 10.0 Organizational Structure

The PMO reports to the Director of Enterprise Application Services. Through the alignment with this office, the PMO gains the following:

1. The *Authority* it needs to promote departmental organizational change effectively
2. *Independence* that can sustain objectivity
3. *Oversight* that can keep its work aligned with ICT and the University's business strategy
4. *Legitimacy* as it fosters an effective, enterprise approach

All PMO Staff will report to the Assistant Director, PMO.

### 10.1 EAS Organizational Chart

## Enterprise Application Services Organization Chart



## 11.0 Stakeholders

The PMO regards the following as primary stakeholders:

Stakeholder	Relationship with PMO	Expectations of PMO
VP of Planning & Information Technology - CIO	Executive Sponsor	Sponsor provides the PMO with guidance on PMO business objectives and supports the PMO's efforts to achieve them.
EAS Director	PMO reports to the Director	EAS Director supervises the PMO Assistant Director
Directors of ICT	Collaborative Partners	The Directors look to the PMO as a source of expertise and support in all matters related to management and the successful delivery of IT projects
ICT Departmental Staff	Client / Participant	The PMO supports the ICT Department in its mission to deliver successful IT projects
UNO DC (Data Custodians)	Client / Participant	As Clients, UNO DC expect the PMO to provide guidance
Project Team	Client / Participant	Expect the PMO to set the PM standard, provide training and mentoring, work with Department and Clients to create an environment conducive to project success



## 12.0 Proposed Strategy

1. Gain agreement on the PMO Charter from the Office of the CIO and additional stakeholders outside of ICT
2. Gain CIO approval for the PMO Business Case consisting of:
  - a. PMO Requirements (high level)
  - b. Implementation Strategies and Schedule
  - c. Project Plan
  - d. PMO Handbook
3. Perform a Project Management Maturity Assessment and take steps to remedy
4. Refine and agree upon PMO performance targets
5. Establish PMO review process and performance metrics

### 12.1 Implementation Plan

The following implementation plan will undergo several phases before reaching the desired state. The plan is broken out by phase, step to be completed within the corresponding phase, details of that task, and the deliverable expected of said task.

Phase	Step	Task	Detail	Outcomes
1	1	Project Planning and Initiation		Project Plan and Schedule
	2	Assess Current Environment	Resources (Staff, Skill set, Funding, Project Tools) Organizational Readiness (Culture, Organizational Support) Governance & Escalation Model	Strengths, Weaknesses, Opportunities, Threats Analysis
	3	Establish Vision & Mission	PMO Mandates PMO Policy & Direction Critical Success Factors PMO Models	Consensus, PMO Vision & Mission
	4	Establish Goals & Objectives		Consensus, PMO Goals & Objectives
	5	Develop Business Case	High-Level PMO Requirements Implementation Strategies & Schedule Cost Estimates	Business Case Document

Phase	Step	Task	Detail	Outcomes
2	1	Define Organizational Structure & Staffing Requirements	Roles & Responsibilities Identify PMO Lifecycle Framework Identify PMO Process Domains	Organizational Structure & Staffing Requirements
	2	Facilitate Supporting IT Governance & Escalation Structure	Integrate PMO with current Governance processes Facilitate Buy-in & Consensus	Updated IT Governance & Escalations Structure
	3	Define Project Management Methodology Framework	Define PMO Lifecycle	Project Management Methodology Framework
	4	Establish Goals & Objectives		PMO Processes & Supporting Documentation
	5	Establish Review Process & Performance Metrics	Balanced Scorecard, 360 Feedback, etc.	PMO Review Metrics
	6	Develop Training Requirements	Project Management Training or Certification Coaching or Mentoring Skills Development Sourcing & Relationship Management Skills	Training Requirements

Phase	Step	Task	Detail	Outcomes
3	1	Develop Deployment Plan	Schedule Resources Costs	PMO Deployment Plan
	2	Deploy PMO	Acquire / Develop PM Methodology Add PMO Staff Pilot PMO	Program Assessments Semi-Annual PMO Review

Sample implementation plan taken from the presentation "ATC Summer Sessions – Project Management Office (PMO)" (Patel 2002)

Aspects of this document are based off PMO templates provided by CVR/IT Consulting – <http://www.cvr-it.com>

## 13.0 Approvals

The signature(s) below indicate acceptance of the Project Management Office's Charter and agreement to all articles included within.

<b>Executive Sponsor</b> <i>(signature required)</i>	
<b>Name:</b> Michael Hites	<b>Signature:</b>
<b>Title:</b> Vice President – CIO	
<b>Department:</b> Planning and Information Technology VP Office	<b>Date:</b>
<input type="checkbox"/> <b>Approve</b>	<input type="checkbox"/> <b>Disapprove:</b> _____
<input type="checkbox"/> <b>Electronic Approval</b> <i>(attach e-mail copy)</i>	<input type="checkbox"/> <b>Approve with Modifications</b> <i>(attach document)</i>