Enhancing Project Management Maturity in the Public Sector

Joseph Fernandes, PMP
Overview

1. PM in the Ontario Public Service (OPS)

2. Project Management Processes & Templates

3. Case Study: The Good, The Bad & The Ugly
   - Project RIP and PM Processes Applied

4. Unified Project Methodology (UPM) Applied
An OPS that's aligned to deliver on government's priorities and is accountable for public resources over the long-term.
Business Value & Drive of PM

OPS is driving change by:

• Focusing on Priorities
  – RBP

• Aligning to Achieve Horizontal Results
  – Climate Change Secretariat - GO Green Action Plan

• Delivering

• Delivering results through project management
  – Making it easier to get service – ServiceOntario

• Improving
  – Measuring and improving performance - e.g. Education’s evidence-based planning and improvement
Project Management in the OPS

PMI’s 5 Process Groups

OPS 5 Phases
Maturity Transformation Program

- 2005 Task force recommendations:
  - make project management a core competency in the OPS
  - put greater focus on upfront planning and develop more robust business cases
  - adopt a formalized gateway review process for project approvals
  - take a portfolio management approach to I&IT investments
PM Practices & Processes

- People-centric approach taken and processes & tools enable and allow for:
  - Communication; Governance, Team Development, Stakeholder Management, Client Service
  - Communication to stakeholders – who talks to whom, when & why and using what tools and how
  - Stakeholder expectations and team building objectives are met via goal to ‘operate synergistically and limit disruptions’
  - Clients satisfaction once HSC is ‘trusted IT advisor’
Deployed Processes & Tools

1. Project Status Reporting Cycle
2. Governance & Roles and Accountability Matrix (RAM)
3. Issues Management
4. Kick-off
5. Financial Tracking
6. Risk Management
7. Change Control
8. Lessons Learned
9. Project Reporting
10. Project Team Collaboration Environment
Case Study: Project RIP

**Project RIP**

**YELLOW: Previous Application**
- Performance Degradation
- Lack of integration
- No Business Intelligence

**Project Gating Committee**
- Unable to ensure compliance pre 2011
- Enhancements Mar 2011
- more frequent new process
- PMO support to PM in advance

**I&IT Project Approval Committee (ITPAC)**
- Approved 2009 with aggressive timeframe
- Violation: ACT CP #1 sought before Gate 1 Approval in 2009
- Case for COTS Solution, Consulting Services & Maintenance
- Marketplace Assessment via RFI
- RFP to acquire COTS software

Vendor: 2004 - 2011
- contract extended to Sep 2012
Processes for Project RIP

- Governance & RAM
- Kick-off
- Project Status Reporting Cycle
- Issues Management
- Risk Management

- Financial Tracking
- Change Control
- Project Team Collaboration Environment
- Lessons Learned
- Project Reporting
Governance & RAM

Project Governance Structure

1. Steering Committee

2. Executive Project Sponsor

3. Project Sponsor

4. Project Manager

5. Advisory Board

6. Subject Matter Experts

7. Project Support Team

8. Core Project Team

Coordinating/Coordination/ Collaboration/Reporting

© Symposium 2011 - Project Management for Organizational Excellence
Governance Accountability Map

[Diagram showing the Governance & RAM Accountability Map with Key Team Members, Project Manager, Sponsor, and Steering Committee roles and responsibilities.]
Project Kick-Off

Project Kick-off

1. Project Kick-off Session Facilitated by the HSIC FMO
   (Facilitator & Scribe)

2. High-level Work Packages
   & Milestone Schedule

3. Core PM Processes
   (Governance & RAM)

4. Status & Next Steps
   (Sponsor Analysis)

5. Project Manager

6. Key Players
   (Project Manager, Project Sponsor, Third Party Reps, Team Leads, etc.)

7. Comment, Ideas, etc.

8. Kick-off Outcomes

9. Kick-off Objectives

10. Key Milestones & Dates

© Symposium 2011 - Project Management for Organizational Excellence
Status Reporting Accountability Map
Project Status Reporting Cycle

- Team members submit status reports to Team Leads
- Team leads chair team/work package status meeting
- Team leads complete and send status report to PM
- PM chairs project status meeting with team leads
- PM completes and sends status report to sponsor
- PM chairs project status meeting with sponsor. Sponsor provides guidance.
- PM communicates to team leads key messages
Project Status Reporting

- Accountability Maps (process flows), templates & instructions provided for:
  - Team Status Reporting Process
  - enables team development & team building
  - Project Reporting -status, progress, forecast
  - ensures communication, governance, risks, issues & stakeholder management
Issues Management Accountability Map

© Symposium 2011 - Project Management for Organizational Excellence
## Issues Management & Issue Log

### Issues Log

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Date Opened</th>
<th>Urgency</th>
<th>Impact</th>
<th>Deadline</th>
<th>Issue Age</th>
<th>Owner</th>
<th>Issue Title</th>
<th>Issue Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Resolved</td>
<td>21-Jun-09</td>
<td>High</td>
<td>High</td>
<td>26-Jun-09</td>
<td>3</td>
<td>Jane</td>
<td>Lack of Sponsor Engagement</td>
<td>P.M. has not been able to meet with the Sponsor in over 3 weeks.</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Project Financial Tracking
Project Team Collaboration
Lessons Learned

- Pre-session interviews with key members
- Open and honest dialogue and feedback encouraged to provide optimum value
- No blame assigned, but constructive feedback/next steps to be carried forward
- Accountability for implementation of lessons learned outcomes resides with Project and Cluster governance bodies
Unified Project Methodology

- A standardized end-to-end I&IT methodology that integrates I&IT Project standards into a streamlined and unified whole
- Applicable to all types and sizes of I&IT Projects and Project Programs
- Supported by consistent templates
- Streamlined and easily understood by variety of audiences
What is Unified?

1. Project Portfolio Management
2. Project Program Management
3. Project Management
4. Systems Development Life Cycle
5. Project Gateway Process
6. Enterprise Architecture Framework
Standards & Requirements

Ministries, clusters and agencies must

33. manage I&IT projects in accordance with the methodology contained in the OPS Integrated Project Management Framework and Methodology
34. manage any group of projects identified with a particular initiative, strategy, or corporate undertaking as a portfolio in accordance with the OPS Project Portfolio Management (PPM) Framework ... providing that all the projects in a portfolio must still be managed in accordance with the Methodology.
36. approve any project with a four-year projected cost greater than $1M through a gateway review process incorporating review and decision points at critical project lifecycle transitions, in accordance with operational policy.
Summary Conclusion Slide

1. Overview of project management in the OPS
2. How the Maturity Transformation Initiative increased staff PM maturity levels in the HSC
3. Provided case studies and real-life examples of how the processes improved project outcomes
4. How the UPM did this too and improved client service and project success
Q&A