



# Transforming Organizations with Project Management Excellence – the OPS Experience

**Presentation to:**  
PMI GREATER TORONTO INFORMATION SYSTEMS  
LOCAL INTEREST GROUP  
January 17<sup>th</sup>, 2008

*Project Management Centre of Excellence  
Project Management Consulting and Development Group  
Modernization Division  
Ministry of Government and Consumer Services*

# AGENDA

- Ontario Public Service (OPS) Modernization Agenda
- Overview of the Project Management Centre of Excellence (PMCoE)
- Warm Up Exercise
- PMCoE Products – What we developed
- PMCoE Services – What we do
- PMCoE WebSite Demo
- Interactive discussion ~ Qs & As

# MODERNIZATION AGENDA

## Modernization Division *Mandate*

To build capacity across the OPS to create and sustain transformational change and achieve modernization objectives by providing management frameworks, methodologies, tools, learning and consulting services.

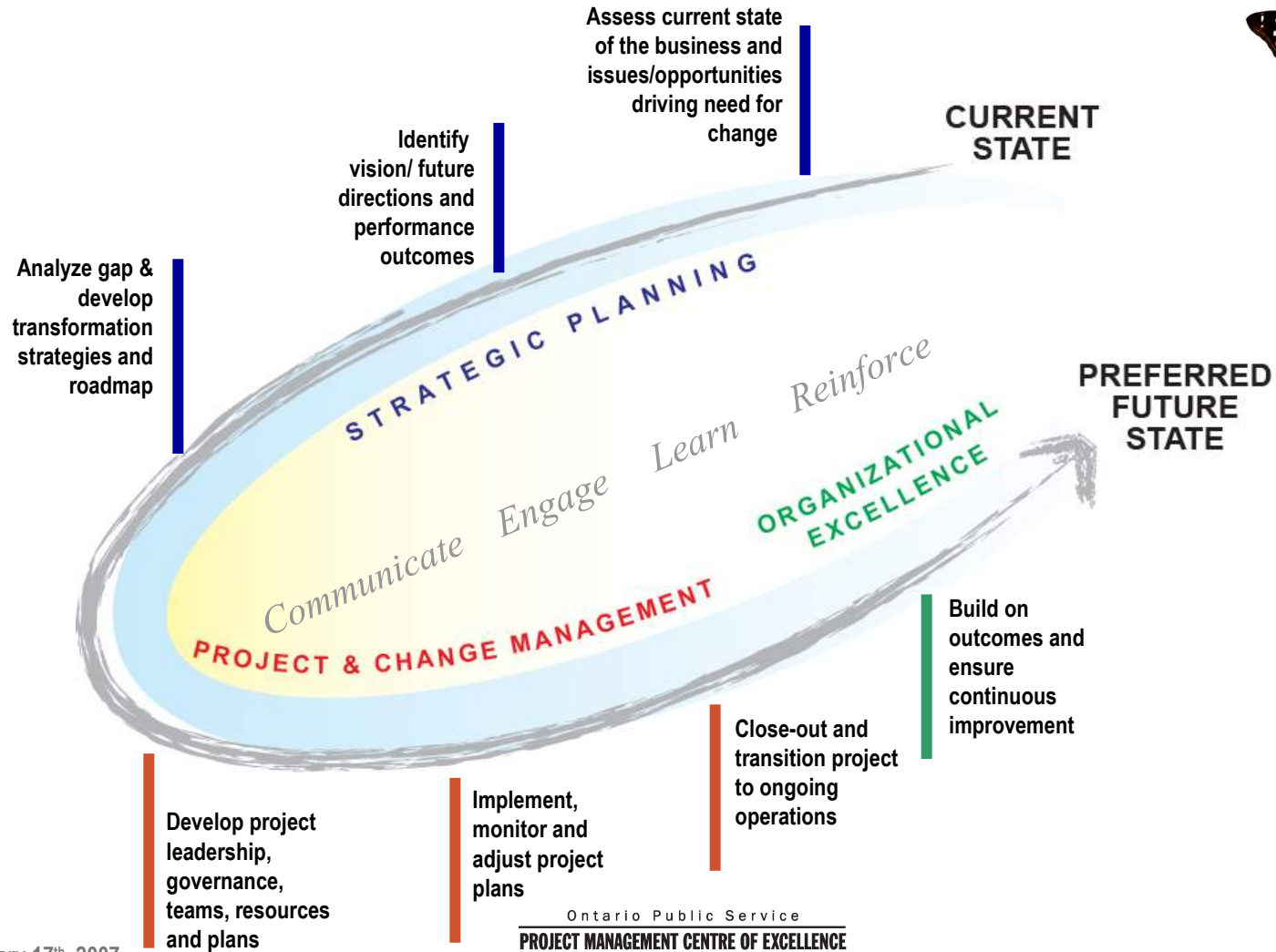
To lead and support corporate programs and projects that advance the modern OPS agenda.

## PMCoE *Build OPS Project Management Capacity*

Given projects are the primary vehicle to introduce change, it is critical that OPS ministries improve their capacity to effectively lead, plan, implement and manage projects to deliver transformation results

# Modernization Division

## Integrated Consulting Services and Tools



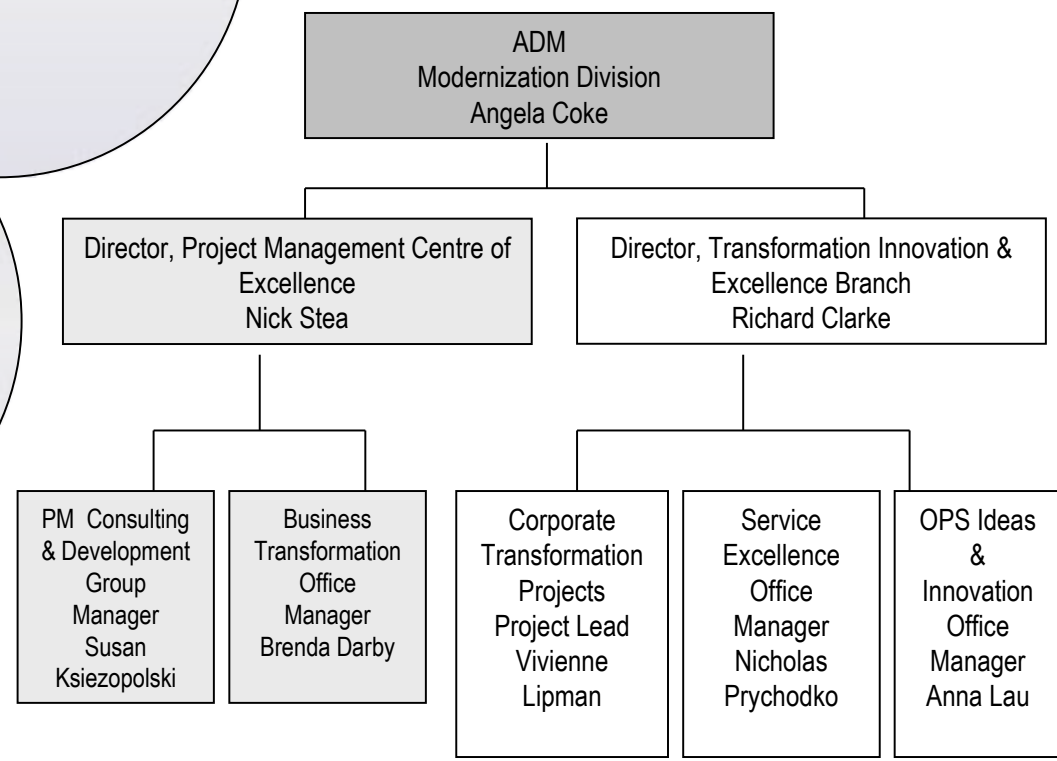
MODERNIZATION

ONTARIO PUBLIC SERVICE

January 17<sup>th</sup>, 2007

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# PMCoE's Focus on Consulting



MODERN

# PMCoE

## Business Transformation Office: Products & Services – Strategic Planning

- Undertaking a business transformation from strategic planning to developing a roadmap and continuous improvement
- Business Process Improvement
- Environmental Scanning/SWOT Analysis
- Setting vision, mission, values and high-level performance outcomes
- Gap analysis and strategy development
- Partnership building strategies

# PMCoE

## Business Transformation Office: Products & Services – Organizational Excellence

- Using Organizational Excellence criteria & principles for assessment and continuous improvement
- Lessons Learned methodology and tools



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## Related Divisional Services and Programs

- Common Measurements Tool for customer surveying
- Develop and maintain employee recognition guidelines, best practices and tools
- Customer and employee satisfaction data and research
- OPS Ideas Program
- OPS Innovation Fund



# Project and Change Management

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# OVERVIEW OF PMCoE – Project Management Consulting & Development Group From Initiative to Centre of Excellence – How we got here

- In 2001 an estimated 6000+ Ontario Public Service (OPS) staff and 30% of senior managers were engaged in projects at any time
- There was an increasing reliance on projects to achieve business and organizational change goals
- The OPS lacked a consistent structured approach to PM and PM principles and practices; staff were re-inventing plans and processes with every new project
- Project Management Excellence Initiative (PMEI) was established in July 2002 within Cabinet Office
- Building on the success of PMEI, in September 2005, the Modernization Division launched the Project Management Centre of Excellence (PMCoE)
- Given projects are key to achieving change and transformation – PMCoE provides a corporate resource to the OPS to support project success

# OVERVIEW OF PMCoE – Project Management Consulting & Development Group – Con't

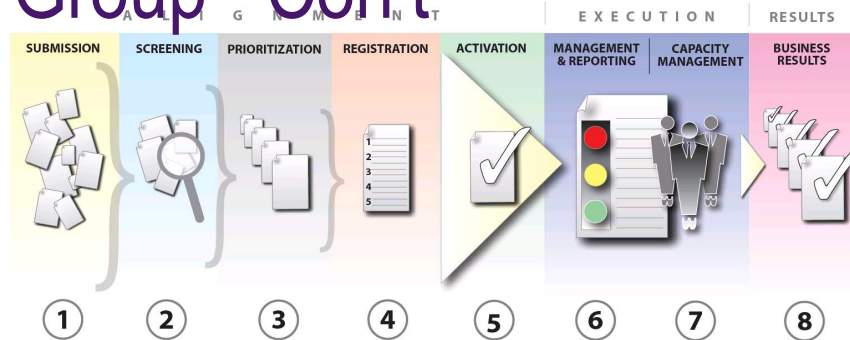
## **MISSION:**

- To become the recognized leader in providing valuable project expertise, guidance and practical support to build project management capacity, enable change and project success in building a modern OPS.

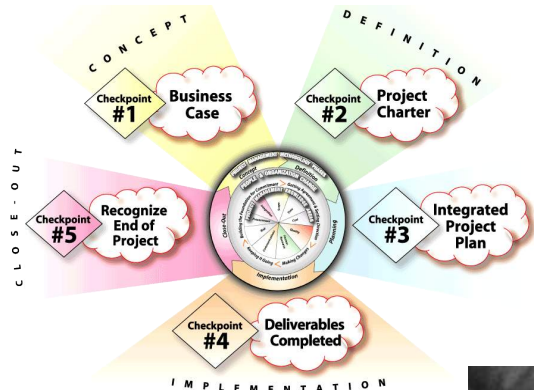


# OVERVIEW OF PMCoE – Project Management Consulting & Development Group –Con't

**VISION:**  
**Right Projects**



**Done Right**



**Results Achieved**





# PROJECT MANAGEMENT

- A project is a temporary endeavour undertaken to create a unique product, service, or result<sup>1</sup>
- Project Management is the application of knowledge, skills, tools and techniques to project activities to meet project requirements<sup>2</sup>
- 90% of executives agree that project management is an effective way to ensure success<sup>3</sup>



• 1 A Guide to the Project Management Body of Knowledge (PMBOK® Guide), Project Management Institute (PMI®), 2000 Edition, pg.4

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• 3 2005 PMI Annual Report

# CHALLENGES OF PROJECT MANAGEMENT



- Group Discussion...

# CHALLENGES OF PROJECT MANAGEMENT

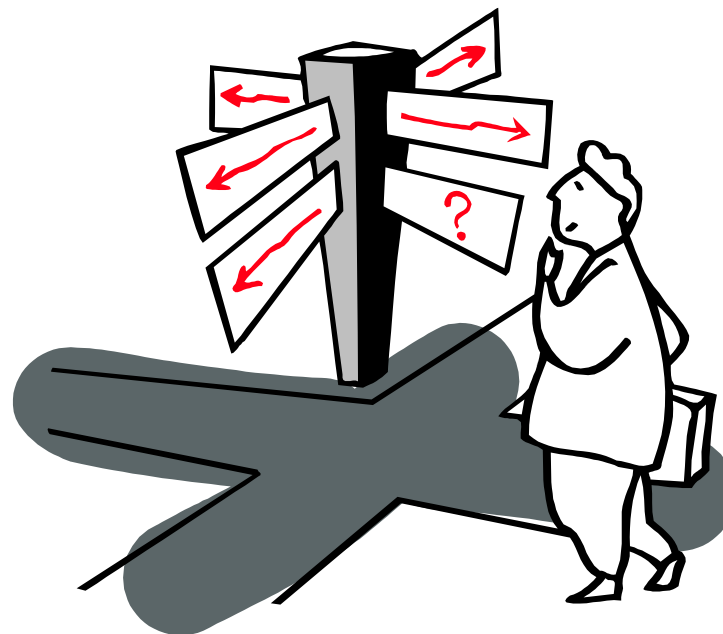


- Challenges traditionally encountered by many organizations, project leaders, managers and teams:
  - Inconsistent approaches across the enterprise
  - Varying knowledge and tools for project scoping, planning & cost/duration estimating
  - Slow project start-up
  - Duplication of effort
  - Inconsistent tracking, monitoring and reporting between projects
  - Difficulties recruiting and retaining project staff
  - Unclear career paths

# PUBLIC SECTOR ENVIRONMENT

- Large number and wide variety of stakeholders
- Different criteria for selecting projects
- Long, and rigorous procurement cycles
- Lengthy approval processes
- Risk averse culture
- Standards, policies, directives, and guidelines to follow
- Inherent complexities of working in large, geographically dispersed organizations

*10% of OPS staff and 30% of senior managers are involved in project-based work \**



\* Based on a 2001 Review of Project-based Work in the OPS Bay Consulting Report; OPS = ~ 60,000 public servants



# BENEFITS OF PROJECT MANAGEMENT

- ✓ Improved decision-making
- ✓ Greater predictability of results
- ✓ More effective use of resources
- ✓ Increased satisfaction of those involved and impacted
- ✓ Calculated management of risk
- ✓ Improved knowledge transfer
- ✓ More connected organization working together across horizontal boundaries
- ✓ Reduced duplication and ultimately better project outcomes



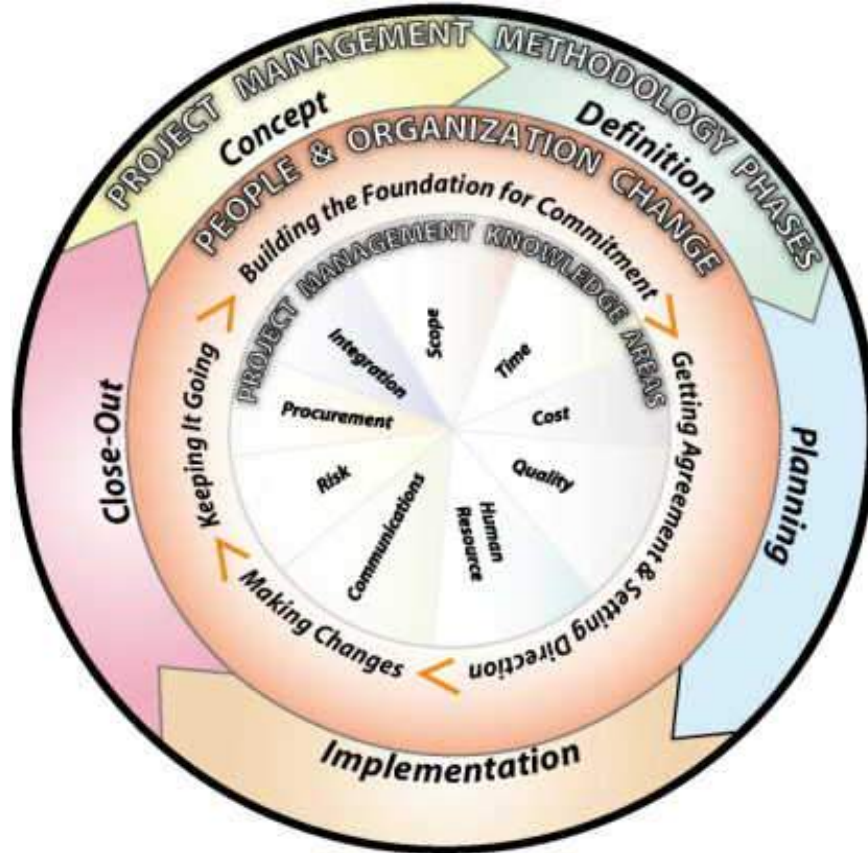
# PMCoE Products – What we developed



- Project and Project Portfolio Management Frameworks, Methodologies, Tools:
  - Integrated Project Management Framework and Methodology (IPMFM)
  - Project Portfolio Management (PPM) Framework
- Project Management Support Guides
  - Project Start-Up
  - Project Management Office Set-Up
  - Health Check
- Project Portfolio Management Support
  - PPM Readiness Assessment



# PMCoE PRODUCTS - STANDARDIZED APPROACH TO PROJECT MANAGEMENT IN THE OPS



The OPS Integrated Project Management Model

Based on global best practices, (PMI's PMBOK® Guide) and adapted for the OPS:

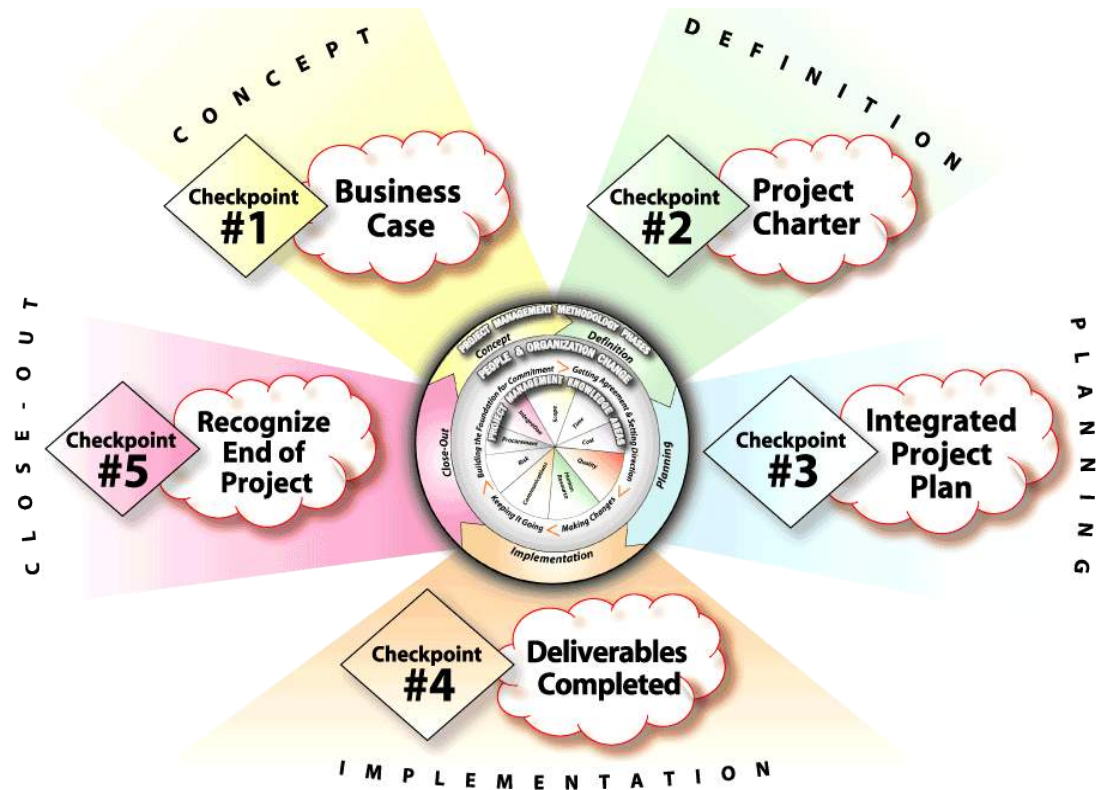
- ✓ developed through extensive OPS-wide consultations with our partners and stakeholders
- ✓ aligns with existing OPS policies, directives, business practices, and other corporate initiatives

Recognizes the importance of people:

- ✓ integrates project management processes and activities with people & organization change management principles, stages and actions

# INTEGRATED PROJECT MANAGEMENT (IPM) METHODOLOGY

- Phased, step-by-step guidelines to initiating and managing OPS projects with clear checkpoints to measure progress!
  - ✓ Objectives for each phase are clearly defined
  - ✓ Steps and actions to complete each objective are identified
  - ✓ Links to available tools and techniques are outlined
  - ✓ Templates to document outputs of each step are provided
  - ✓ Methodology is scalable to project size and complexity



# Project Management Maturity Model



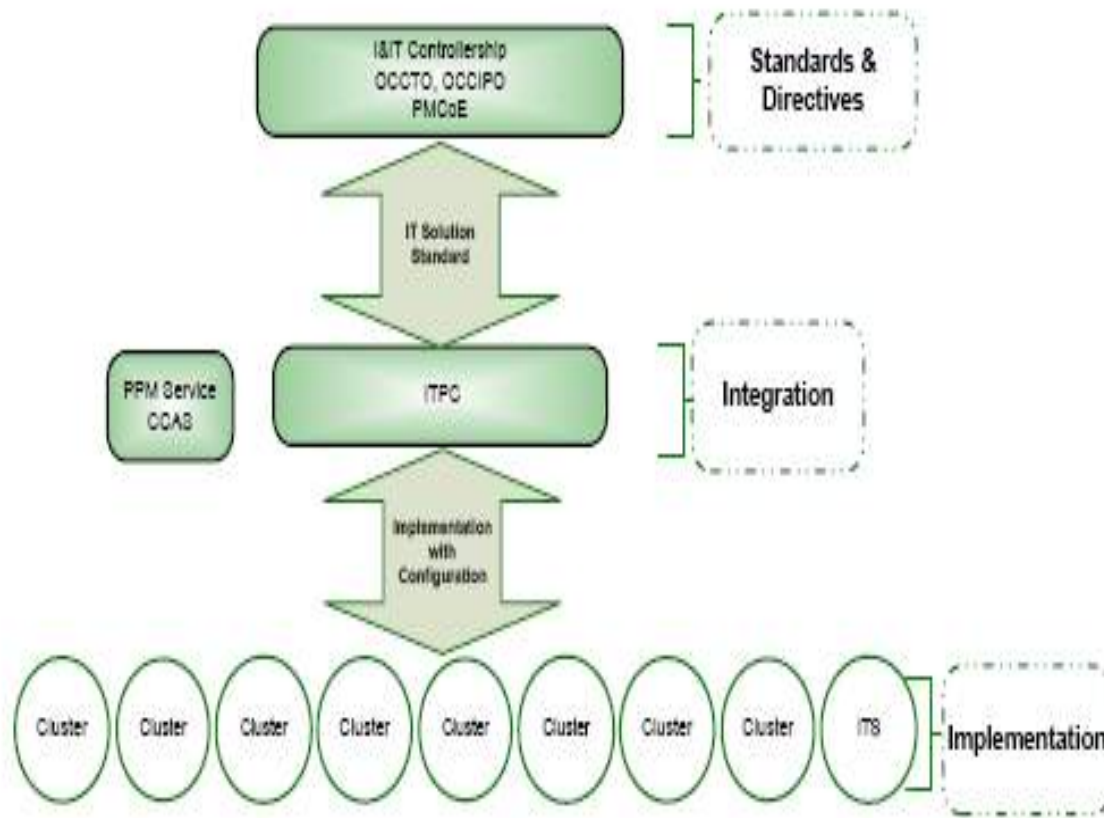
# CURRENT TRENDS IN THE OPS

- Project management seen as key enabler to horizontal projects
  - Greater complexity requires increased rigor
- Heightened concern re: ability to monitor and report on projects
  - Standardized PM is base requirement
- I&IT Audit highlighted issues with project management and portfolio management
- I&IT Clusters directed to adopt IPMFM and PPMF
  - Cascading impact for business areas
- Increased number of PMOs
  - Most I&IT Clusters have or are implementing PMOs
  - PMCOE assisting business areas in establishing PMOs

# Additional IT Project Drivers

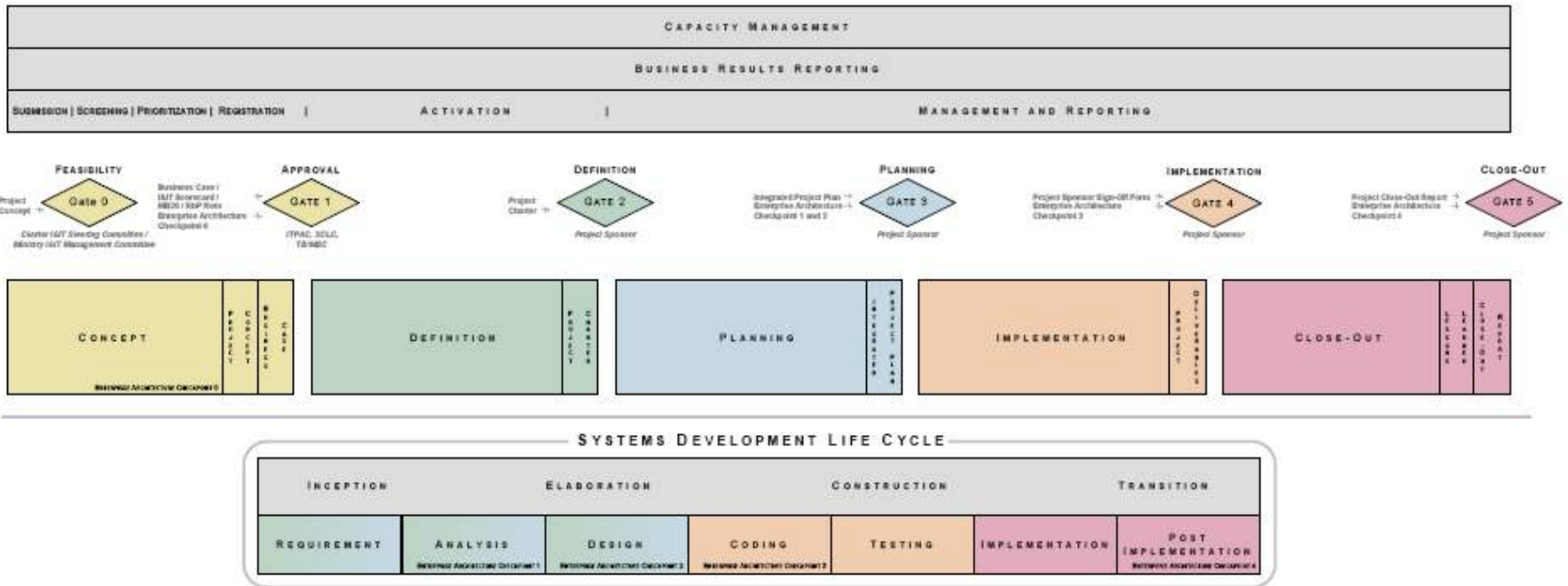
| PROCESS                             | OWNER                                      | PURPOSE  |
|-------------------------------------|--|--|
| Project Gateway                     | I&IT Controllership                        | incorporates review and decision points at critical project lifecycle transitions, in accordance with I&IT Directive |
| Systems Development Life Cycle      | Ontario Corporate Chief Technology Officer | Application Development Standard   |
| Enterprise Architecture Framework – | Ontario Corporate Chief Technology Officer | Ensures architecture meets needs of business and is aligned with architecture standards and methodologies            |

# Unified Project Methodology - Partners





## OPS Unified I&T Project Methodology Overview Model



PORTFOLIO MANAGEMENT  
PROJECT MANAGEMENT

# PMCoE PRODUCTS - Project Management Support Guides

- Developed a number of guides and provide consulting services to clients on their use and implementation:
  - Project Start-Up Guide for project managers and teams. Includes checklists, tools/templates
  - Project Management Office Start-up Guide, different models, approaches and implementation strategy
  - Project Management Health Check Guide – tiered health check levels based on project classification, and degree of expertise required to conduct the health check

# Project Portfolio Management (PPM)

## *Growing need for PPM:*



- **M G S - IT Task Force Report highlighted the need to adopt a standardized project portfolio management approach to manage large IT-driven business transformations**
- **Growing move toward horizontal integration**
- **Results-based Planning**
- **Need for increased accountability and transparency**
- **Resource optimization, focus on improving customer service**
- **Executives want to ensure corporate strategies ACTUALLY get implemented**

# What is Project Portfolio Management?

Science + Art

EVIDENCE-BASED  
DATA

JUDGEMENT

METHODOLOGIES

*Decision-making*

EXPERIENCE

TOOLS

SKILLS

BEST PRACTICES

# Project, Program and Portfolio Management

*Project management means doing projects right... ..*

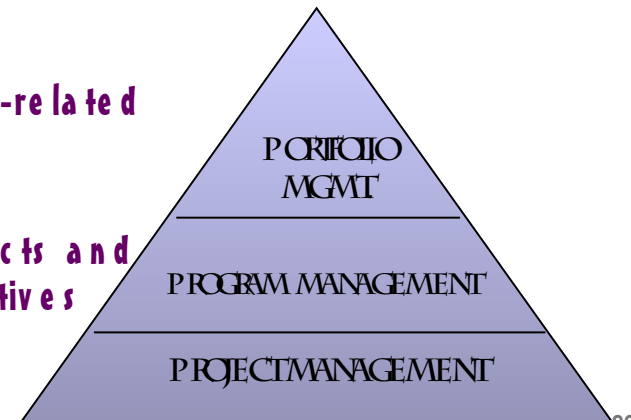
*Portfolio management means doing the right projects... .. .*

- The tools and techniques that enable the management of multiple projects to achieve enterprise objectives by optimal use of resources and achieving efficiencies
- The process of aligning, prioritizing, managing and reporting on an organization's projects to facilitate a balanced and effective portfolio of investments

PROJECT MANAGEMENT— management of scope, time and cost to achieve project objective(s)

PROGRAM MANAGEMENT— management of multiple, inter-related projects to achieve program objectives

PORTFOLIO MANAGEMENT— Management of multiple projects and/or programs (not related) to achieve enterprise objectives



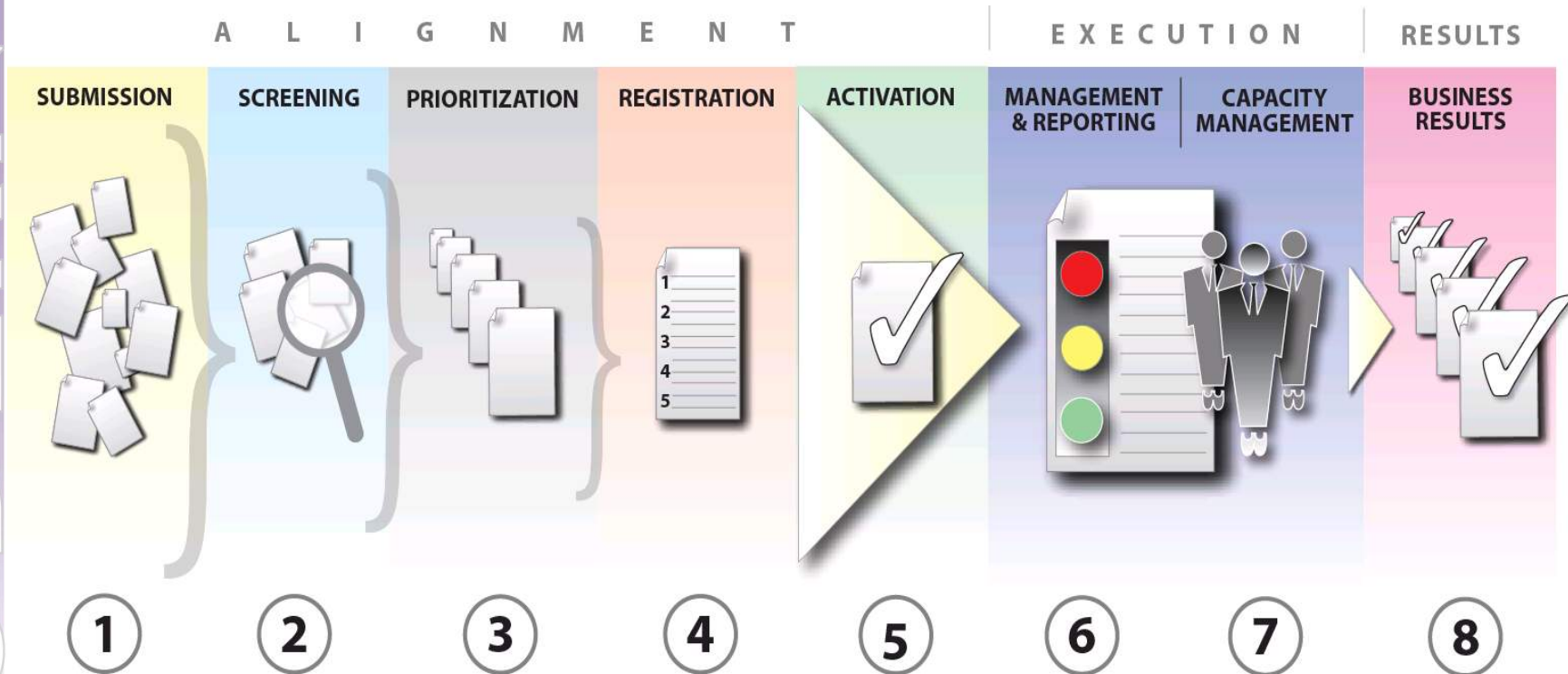
# Drivers for Implementing PPM

- Better alignment between projects and strategy required
- Need for increased accountability and transparency
- Need for effective prioritization processes & timely decision-making is heightened in organizations highly susceptible to change
- Executives need to compare various types of projects for resource allocation
- Growing number and complexity of horizontal initiatives to meet increasing policy mandate
- Integrated PM & PPM approach mandated for IT clusters and IT projects within ministries
  - Implementation starting in business/operational areas across OPS – those organizations with a strong PM foundation will be ready to reap the benefits first

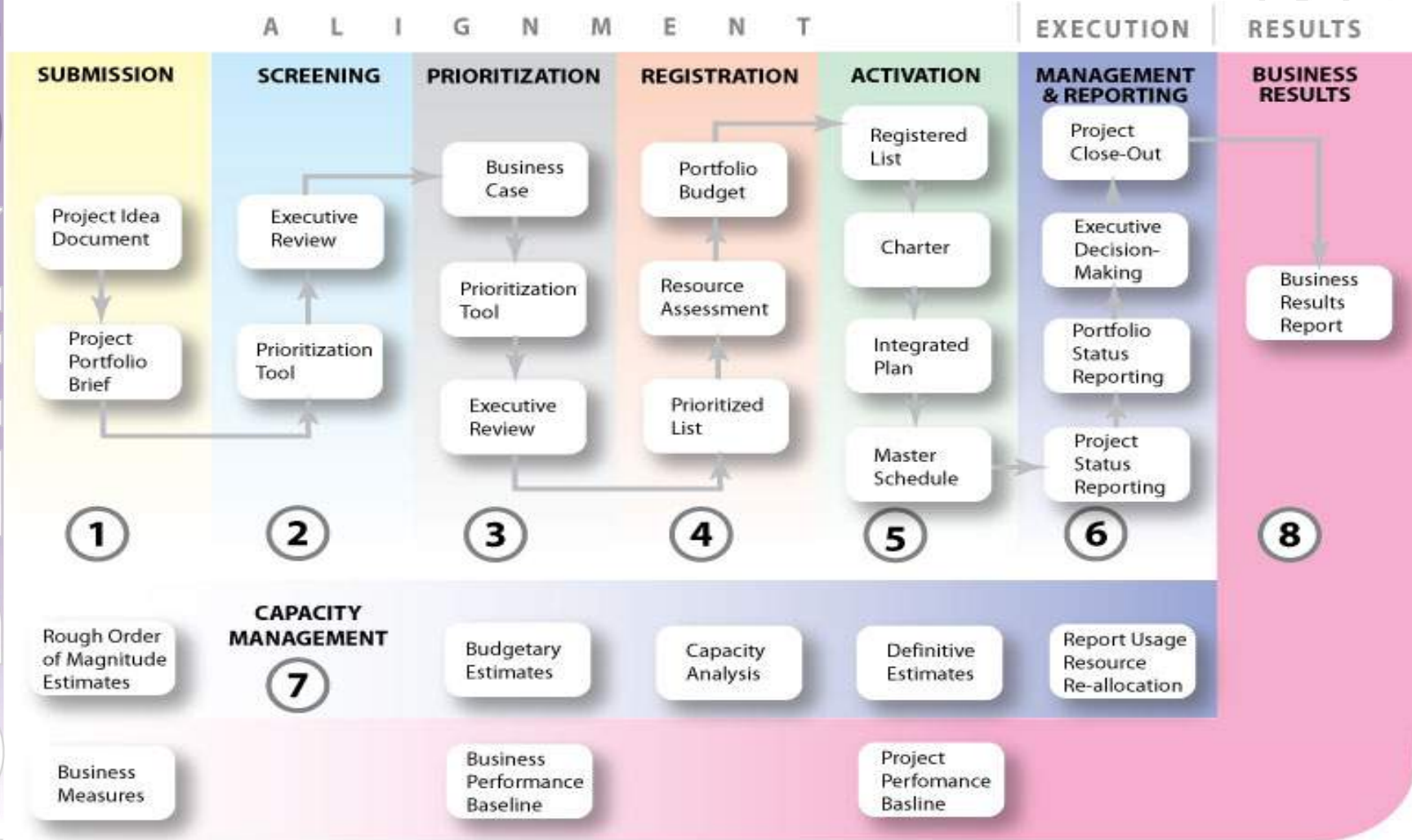


# PMCoE PRODUCTS -

## OPS Project Portfolio Management Framework

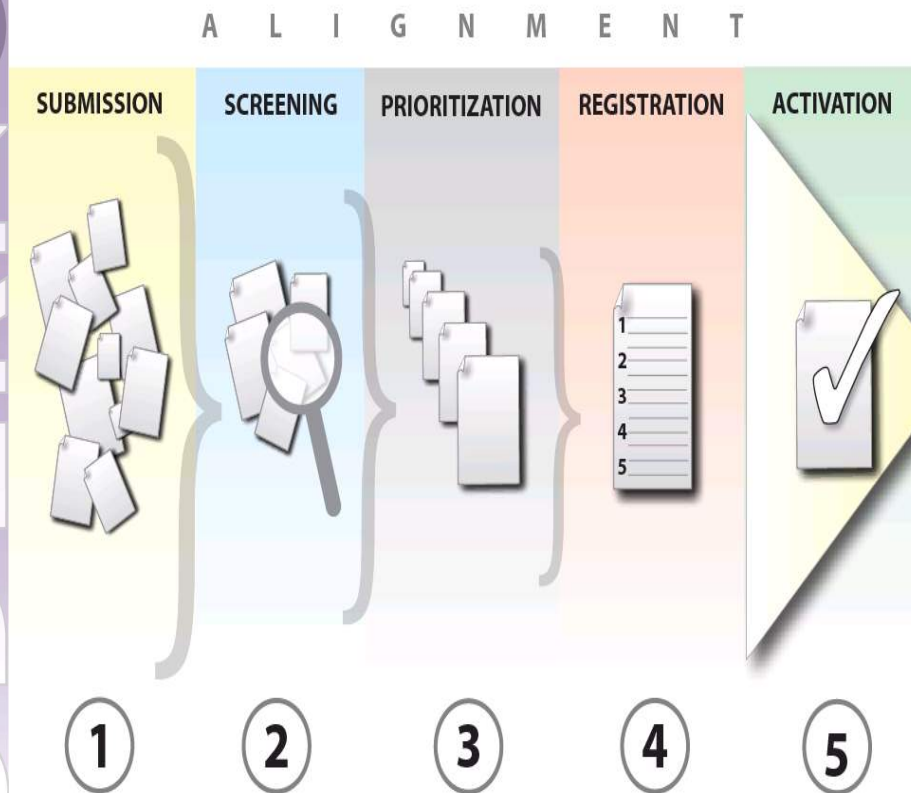


# OPS PROJECT PORTFOLIO MANAGEMENT (PPM) FRAMEWORK





# OPS Project Portfolio Management Framework Alignment Stage



- ✓ **Standardize submissions**
- ✓ **Alignment:**
  - **Strategic objectives**
  - **Quality objectives**
  - **Portfolio specific**
  - **Benefits**
- ✓ **Prioritize projects**
- ✓ **Capacity planning**
- ✓ **Standardize approvals**

# OPS PPM Framework - Submission

## A L I G N M E N T

### SUBMISSION

#### Objective



- Distinguish between projects and Business as Usual (operational), qualify the idea before submission and provide Rough Order of Magnitude (ROM) for Capacity Planning

#### Output

- Project Idea Outline, Project Brief and ROM



# OPS PPM Framework - Screening

A L I G N M E N T

## SCREENING



### Objective

- Determine the validity and impact of the projects from a strategic viewpoint proceeding to prioritization

### Output

- Projects are screened and aligned against organization's strategic and quality objectives for prioritization

2

# OPS PPM Framework - Prioritization

## A L I G N M E N T

### P R I O R I T I Z A T I O N

#### Objective

- Establish relative priority of projects using strategy, quality, risk and benefit as measures

#### Output

- Prioritized list of projects with complete business cases and budgetary level estimates to be registered within a portfolio

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# OPS PPM Framework - Registration

A L I G N M E N T

## REGISTRATION



### Objective

- Establish resource availability for prioritized projects and provide portfolio identification for potential activation candidates

### Output

- A registered list of candidate projects for activation



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# O P S P P M F r a m e w o r k – A c t i v a t i o n

A L I G N M E N T

## A C T I V A T I O N

### Objective

- Define the Project Charter and Plan to support resource allocation and approvals. Adjust type and mix of projects in the portfolio

### Output

- An approved Integrated Project Plan with definitive level of estimates enabling project execution

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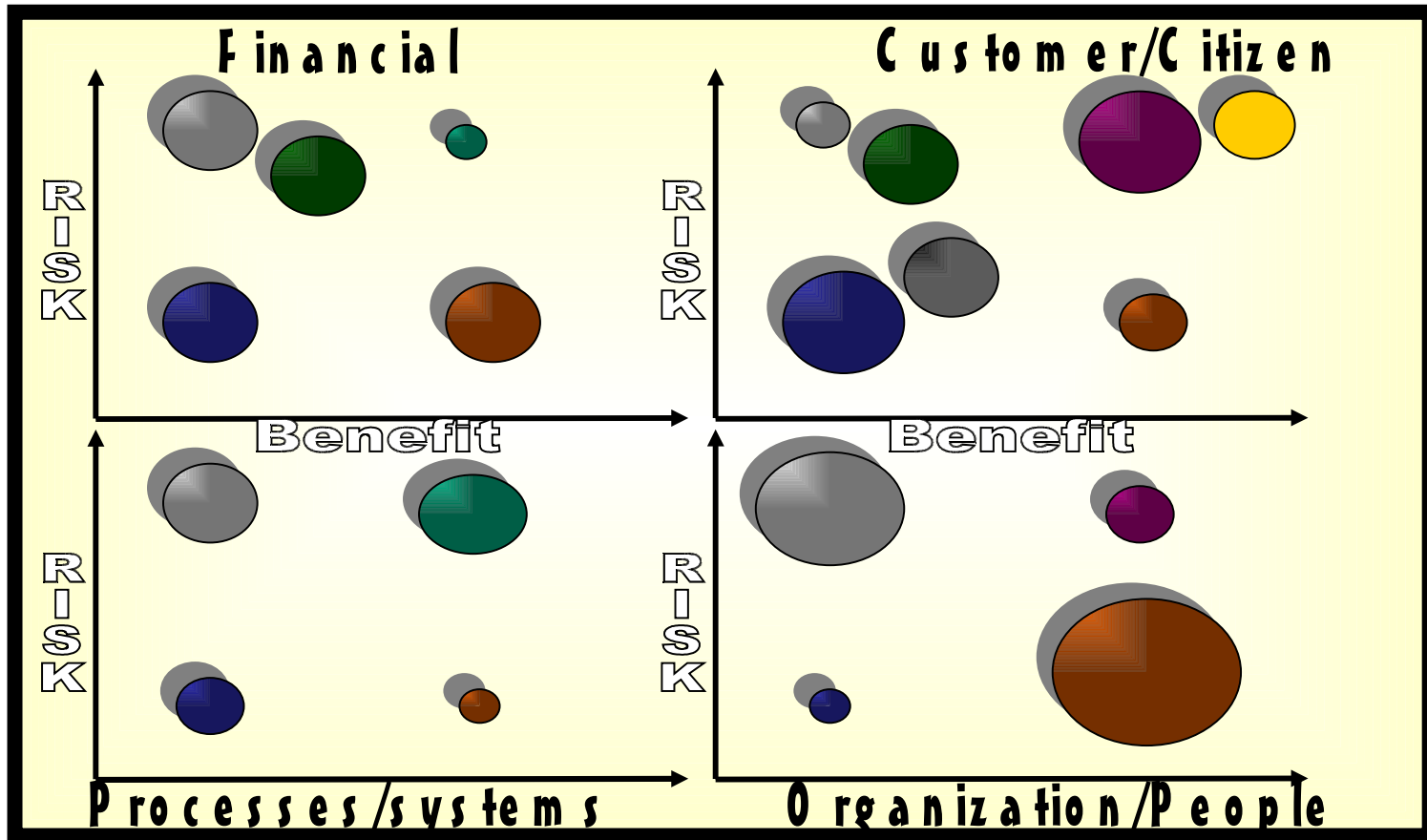
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# OPS PROJECT PORTFOLIO MANAGEMENT (PPM) FRAMEWORK

{ PRIORITIZATION TOOL, PRIORITIZATION TOOL, BALANCED SCORE CARD }

- Project A
- Project B
- Project C
- Project D
- Project E
- Project F
- Project G
- Project H

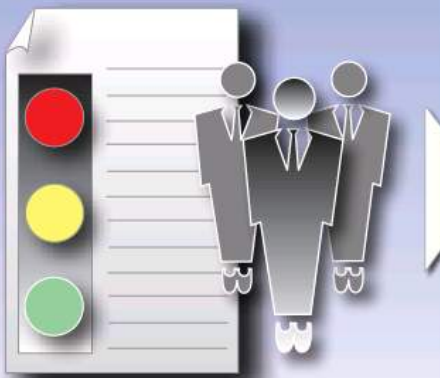


# OPS PROJECT PORTFOLIO MANAGEMENT (PPM) EXECUTION STAGE

## EXECUTION

MANAGEMENT  
& REPORTING

CAPACITY  
MANAGEMENT



6

7

- ✓ Centralize active projects
- ✓ Timely portfolio level decision-making
- ✓ Portfolio optimization
- ✓ Status tracking/progress reporting
  - Schedule and variances are tracked
- ✓ Resource utilization
  - Resource re-allocation based on need



# OPS PPM Framework – Management & Reporting and Capacity Management EXECUTION

## MANAGEMENT & REPORTING

## CAPACITY MANAGEMENT



### Objective

- Measure the project performance and communicate the results for effective decision making at portfolio level
- Optimize use of organization's resources by doing capacity assessment, planning and monitoring

### Output

- Progress reports and decisions to optimize portfolio performance
- Strategic capacity reallocation

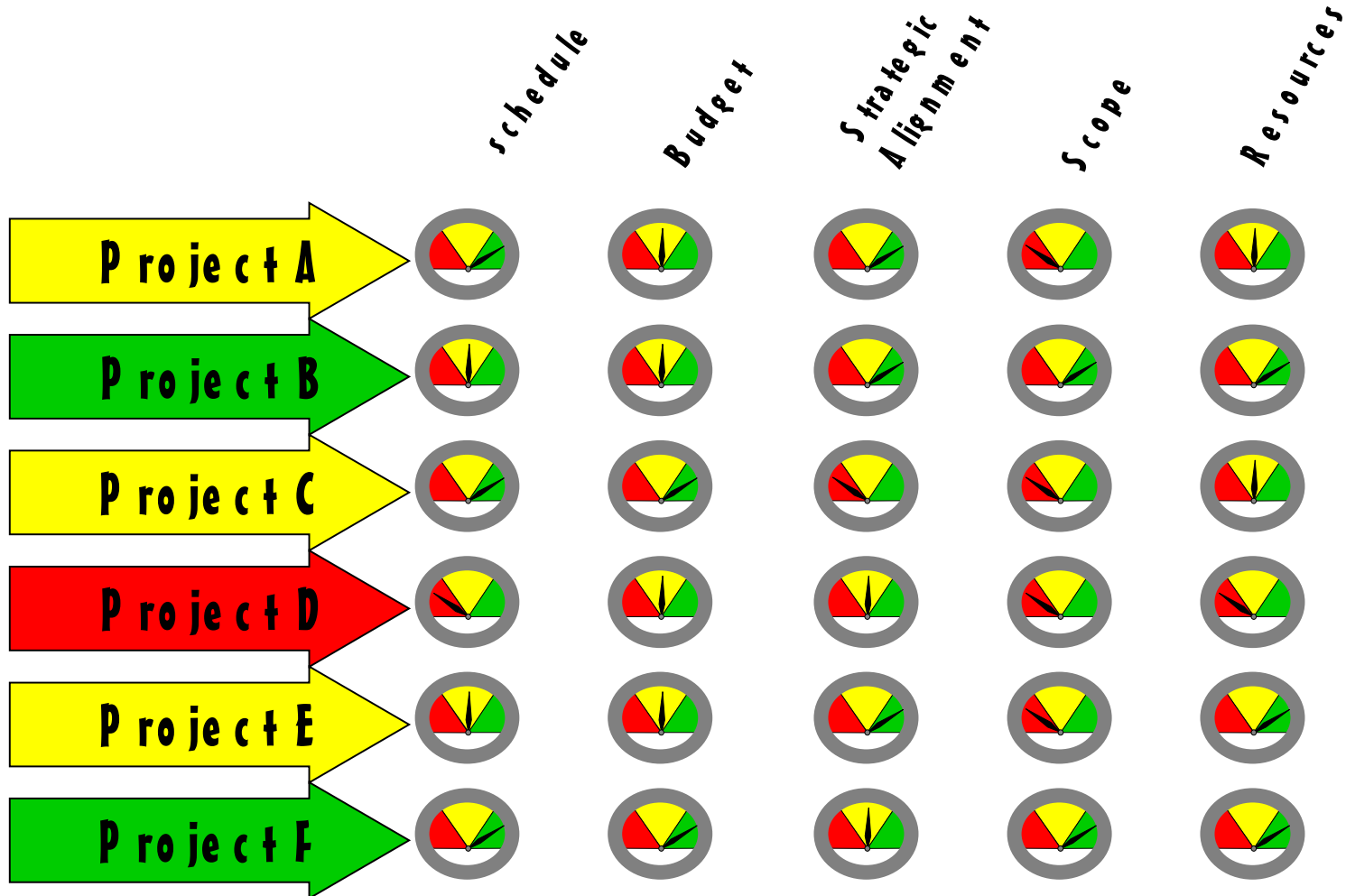
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# OPS PROJECT PORTFOLIO MANAGEMENT (PPM) FRAMEWORK

{MANAGEMENT & REPORTING PORTFOLIO STATUS}

## Customer/Citizen Projects



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# OPS PROJECT PORTFOLIO MANAGEMENT (PPM) RESULTS STAGE

## RESULTS

### BUSINESS RESULTS



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- ✓ Strategic data captured throughout
- ✓ Measure and assess business value of projects and portfolio
- ✓ Validate strategic and value alignment
- ✓ Inform future prioritization process and organizational strategy

# OPS PPM Framework – Business Results

## RESULTS

### BUSINESS RESULTS



#### Objective

- Align, assess and report on business results for the portfolio

#### Output

- A final benefit results report indicating achievement /progress toward strategy objectives

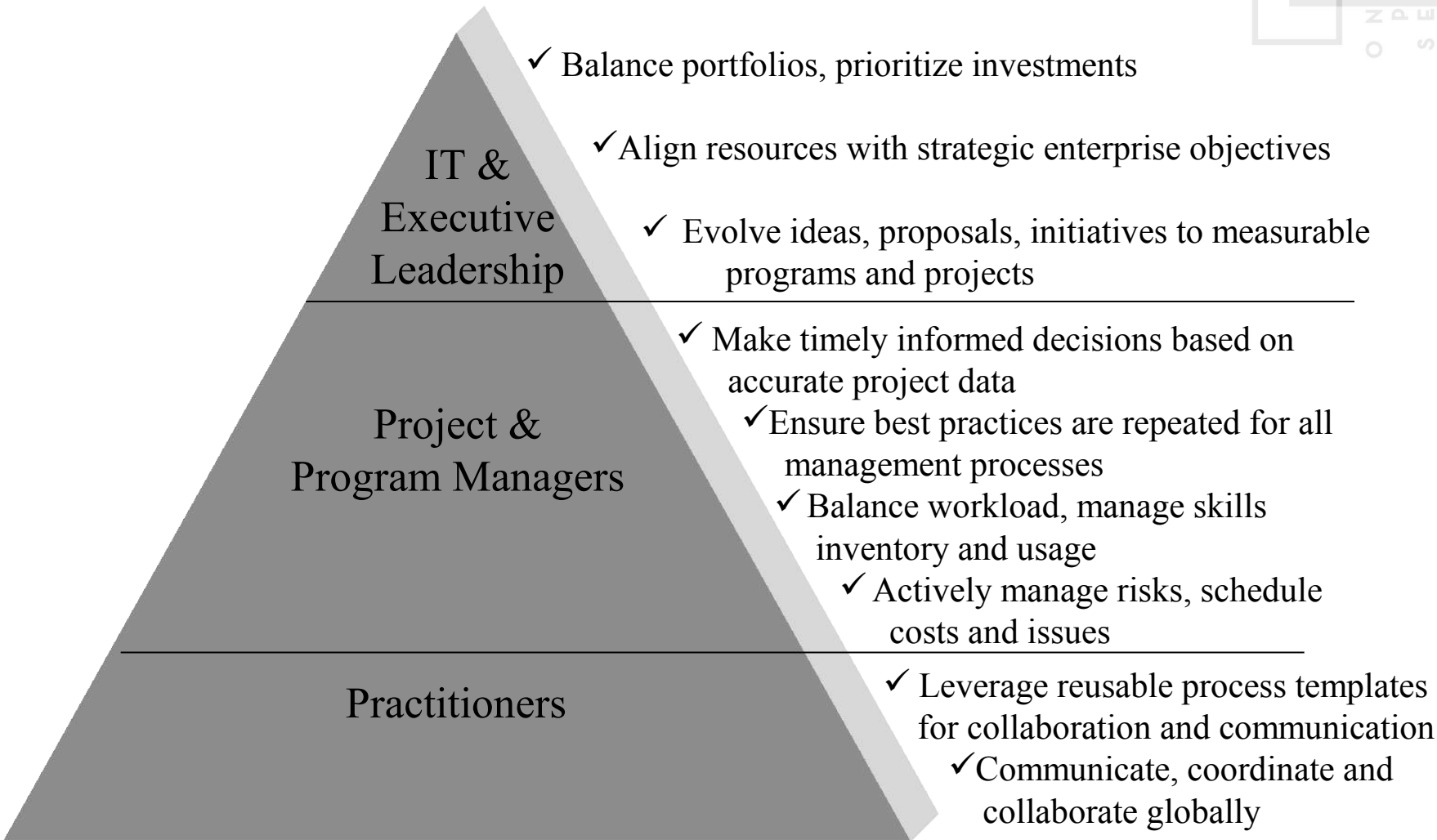
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# What are Project Portfolio Management Benefits?



# PMCoE PRODUCTS - PPM Readiness Assessment

- **Purpose**

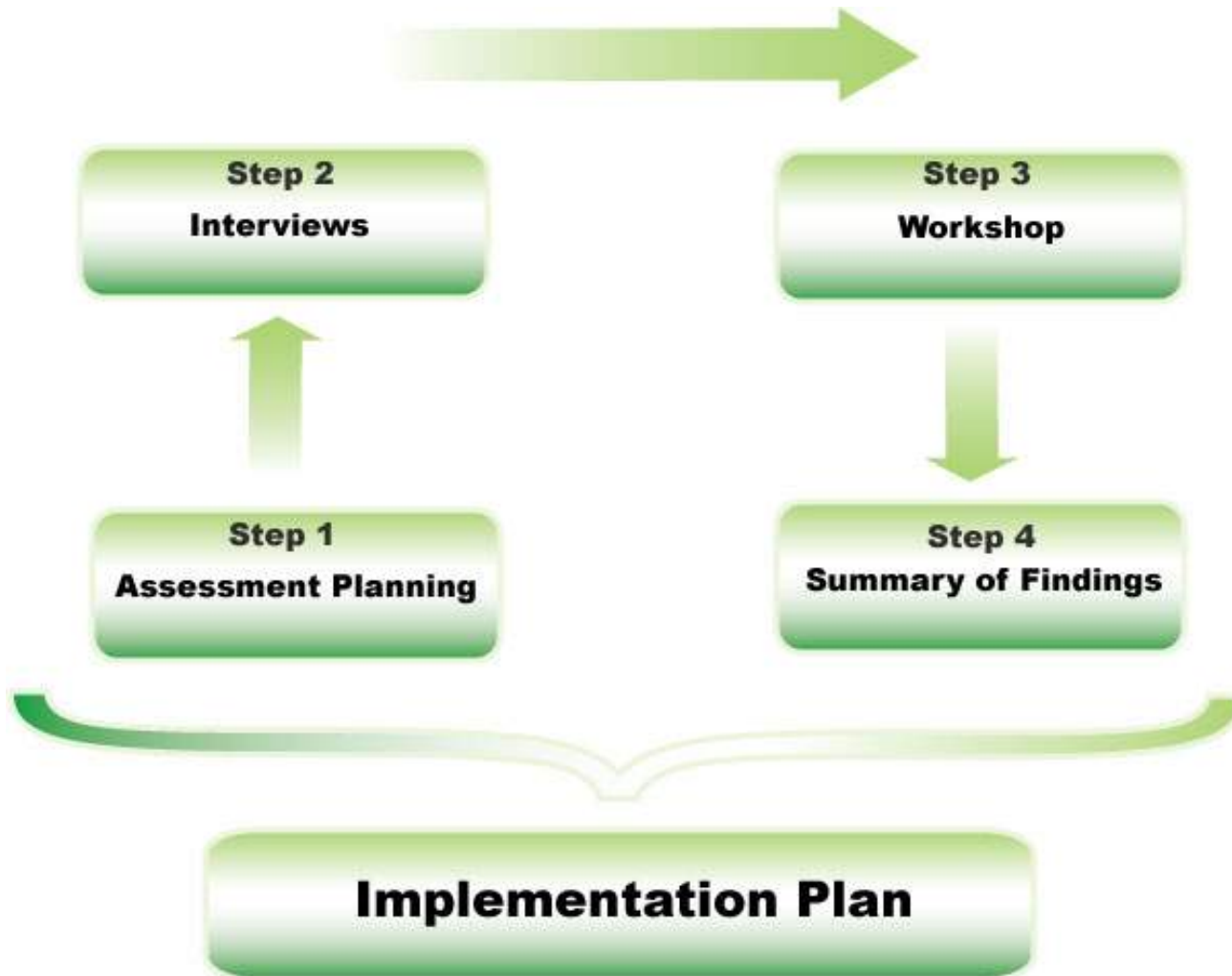
- Gather information about the organization to understand the current state
- Determine organizational readiness to adopt PPM Framework

- **Result**

- Identify organizational challenges and gaps that need to be addressed to enable and sustain project portfolio management
- Recommendations for PPM implementation



# PPM Readiness- How it's done...



# PPM Readiness Assessment

## Sample Statements

### Organizational Readiness

- There is adequate amount of time allotted for planning and to introduce PPM in to the organization

### Project Management Readiness

- We practice project management methodology (in part or in whole) to plan, approve and control our projects in a standardized way.

### Project Portfolio Management Readiness

- We have a process to capture ideas and to determine whether it is valid and worthwhile pursuing





# Requirements to Implementing PPM

- Establish, accept and consistently practice standardized PM tools and processes
- Define portfolio structures
- Develop governance model, roles and responsibilities
- Develop and standardize processes and criteria that support PPM:
  - strategic objectives and elements
  - screening thresholds
  - risk and benefit estimation
  - resource estimating and re-allocation
  - budgeting and approvals
- Develop PPM tools/templates and processes and deliver training

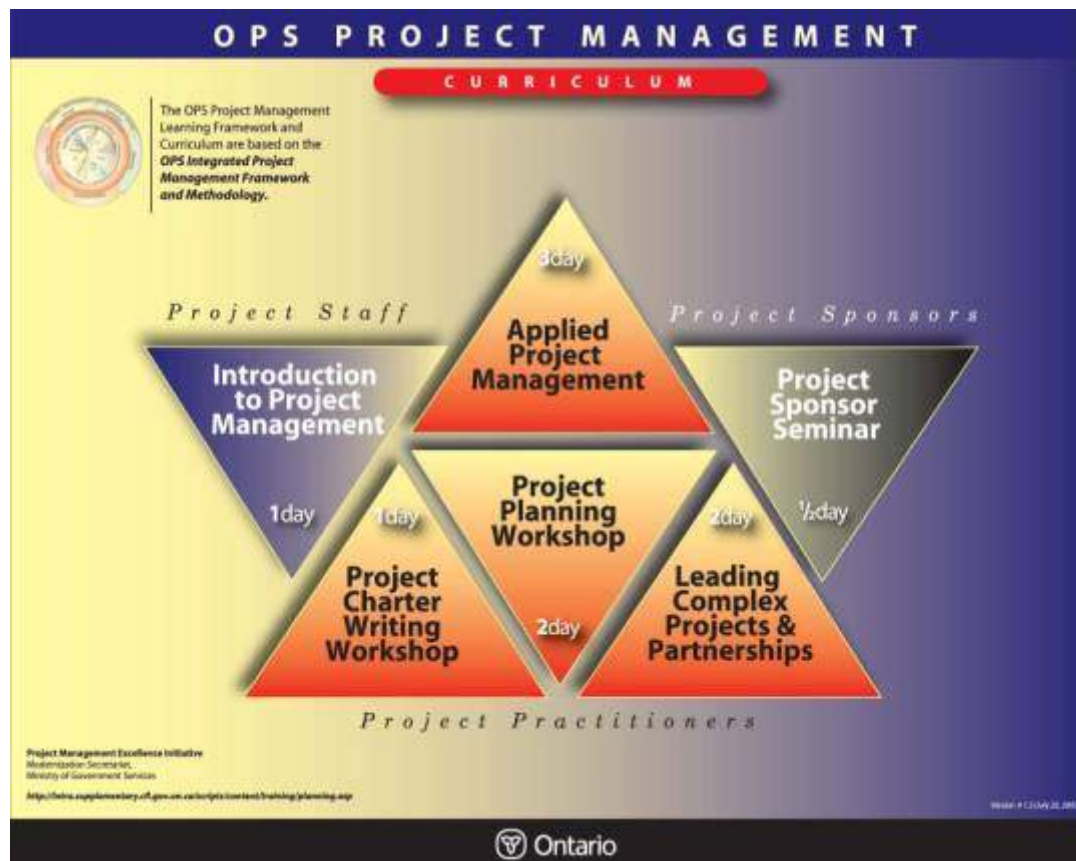
NOTE: PPM business processes need to be established before automated

# PMCoE SERVICES – What we do

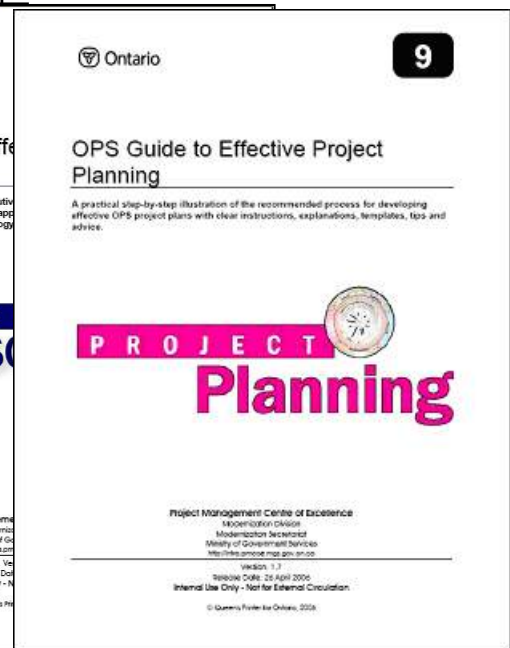
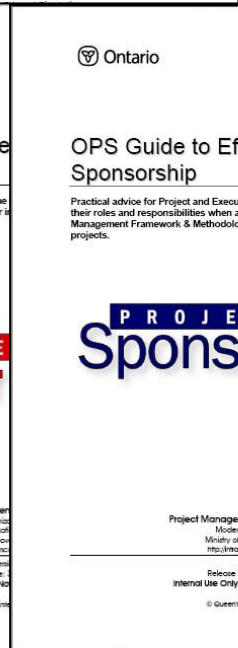
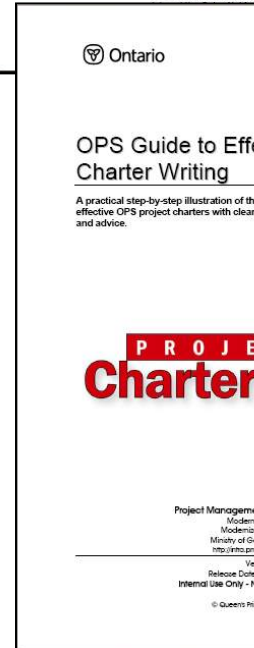
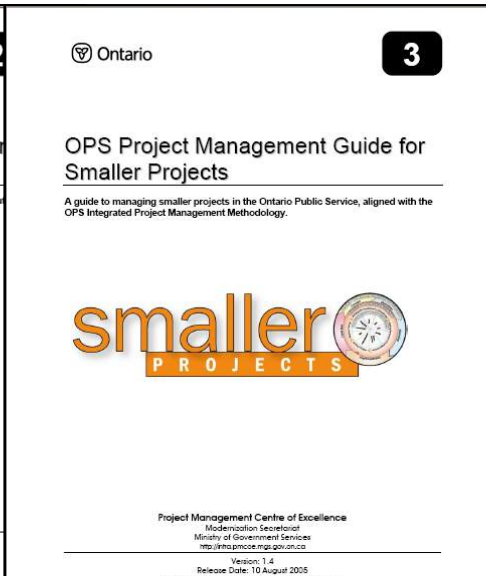
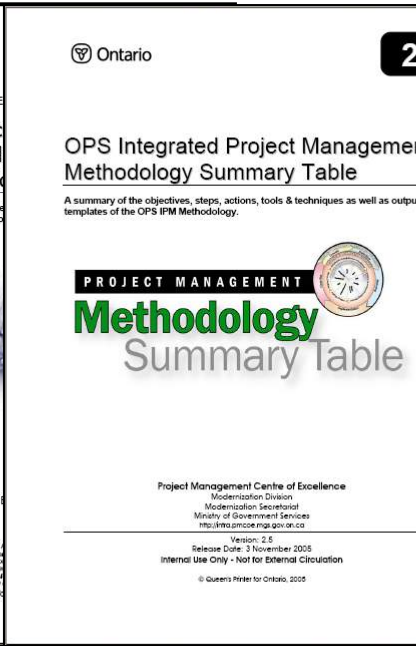
- Provide advice and guidance on OPS Project Management and Project Portfolio Management Frameworks, Methodologies, Tools and Guides
- Develop and offer training programs through Centre for Leadership and Learning
- Develop and implement communication tools - promoting project management
- Lead OPS Project Management community of practice - building project management culture (Including annual conference celebrating project excellence)
- Develop and manage Ontario Internship Program's project management stream – planting the seeds for tomorrow's OPS project managers
- Develop and implement PMP support strategy

# PMCoE SERVICES - PROJECT MANAGEMENT LEARNING FRAMEWORK & CURRICULUM

- PMCoE's courses train people to use and apply the right PM knowledge and tools for the success of their project and are critical to building a project management culture



# PMCoE SERVICES - OPS PM TRAINING GUIDES



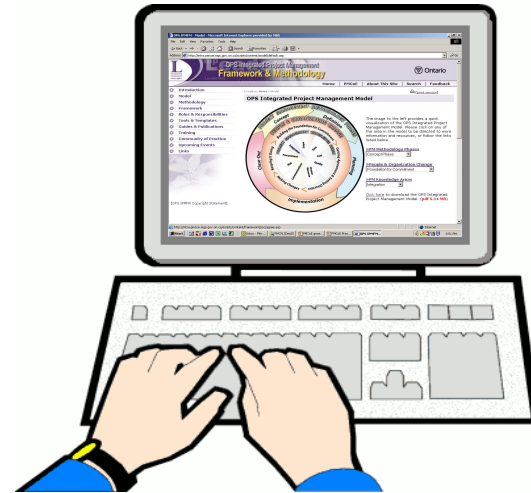
•Guides are a supplement to the methodology

Provide solution-based “windows” into the IPMFM

In response to client requests for focused guidance/support

# PMCoE SERVICES – COMMUNICATION TOOLS

- Intranet web site  
<http://intra.pmcoe.gov.on.ca>



- Feedback, advice and guidance mailbox –  
[project.management@ontario.ca](mailto:project.management@ontario.ca)



- eNewsFlash (3,000 project staff distribution list)



# PMCoE SERVICES - PROJECT MANAGEMENT CONSULTANCY NETWORK (PMCN)

## What is it?

- Informal group of PM practitioners
- Open to anyone in the OPS
- Meet 4-6 times per year
- 800 project management practitioners



## The objectives of PMCN:

- foster project management excellence in the OPS
- facilitate learning, networking and sharing of ideas
- promote a collaborative project management culture
- support professional development and personal growth
- share best practices, network and celebrate successes



# PMCoE SERVICES – International Project Management Day Conference and Awards Ceremony

First annual IPM Day Ceremony held Nov 1<sup>st</sup> at Ryerson

Purpose is to spotlight the value/importance of project management in the public sector

Keynote, guest speakers networking lunch

200 attendees

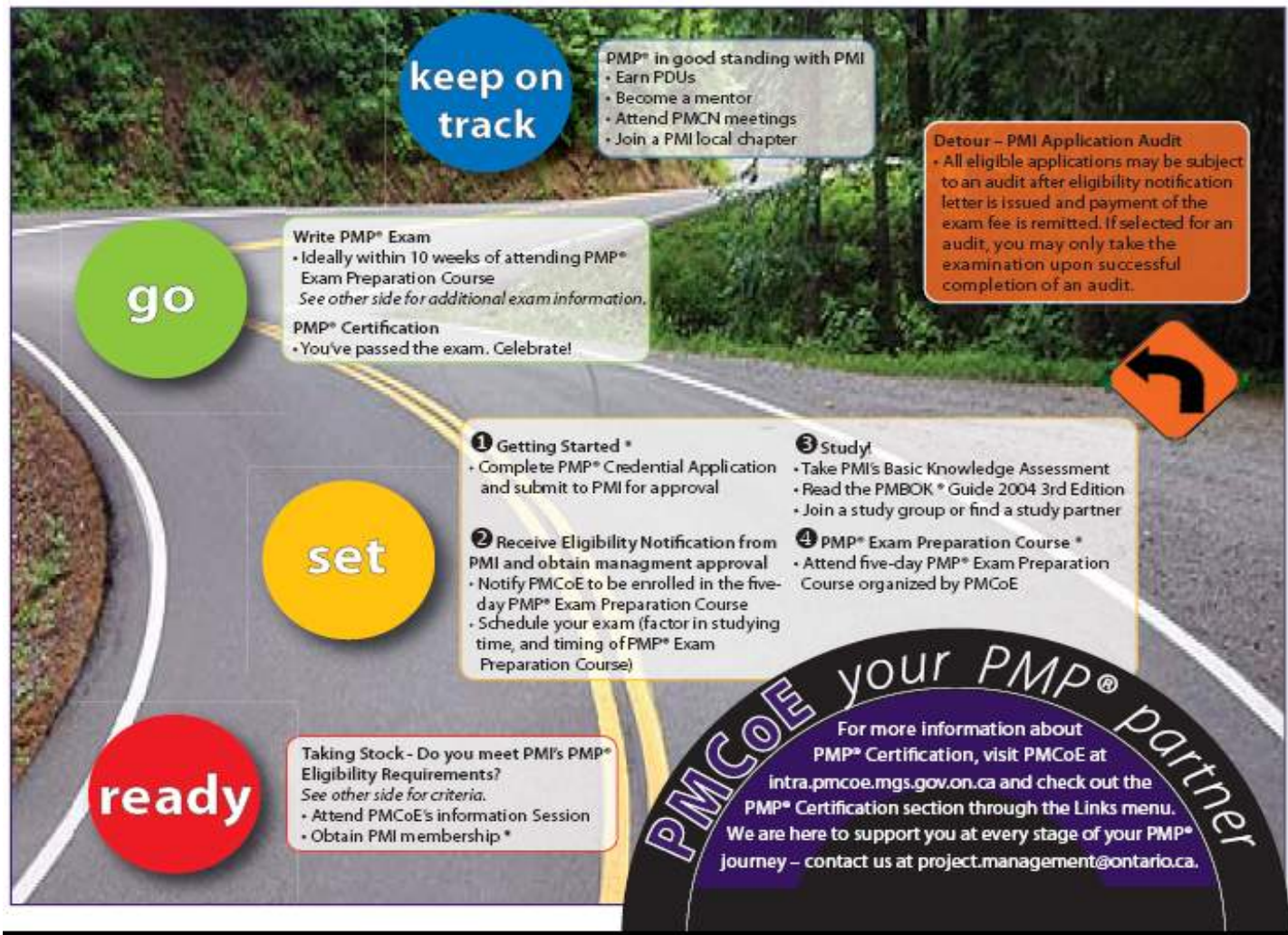
Awards for Exceptional Project Sponsor and Exceptional Project Team

January 17<sup>th</sup>, 2007

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# PMCoE SERVICES – PMP Support Strategy





# PMCoE SERVICES – Ontario Internship Program

## Project Management Specialty Focus Area

- Pilot will run for **two 12-month cycles** for the duration of 4 years from **2006 to 2009**
- **10 Interns** recruited from across the province for 2006; 10 planned for 2007
- Two 12- month **rotational assignments**
- **Learning and development** focused on project management competencies associated with all project management roles
- Additional internship learning and developing programs provided by MGS and PMCoE
- PMCoE/OIP to consider adjustments based on ongoing evaluations

# Strategic Initiatives & Partnerships

- Initiatives:
  - Increase support to existing PMOs; support establishment of new business PMOs
  - Maintenance and Enhancement of existing methodologies, tools, training, OIP, Website, PMCN, ITPMO, Gating
  - Subdivision of PM methodology into “customized” OPS specific streams (e.g. IT, Policy, procurement, audit services, products, based on readiness)
- Partnerships:
  - Business partnerships to embed project management across the OPS to systematically increase project management capacity (ABCs; VOR; Audit; HSC – IT Project Delivery Centre)
  - Creation of **Business PMO Working Group** – discover their needs and how PMCoE can raise the level of PM practices within the PMOs
  - General Management VOR

# PMCoE WEBSITE DEMO

<http://intra.pmcoe.mgs.gov.on.ca>



# Q u e s t i o n s ?



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**Project Management Consulting and Development Group**

**Project Management Centre of Excellence**

**Modernization Division**

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MODERNIZATION