Information Technology Services
Project Management Office (ITS PMO)
FOUNDING CHARTER

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EXECUTIVE SUMMARY

The mission of the UTHSC Information Technology Services Project Management Office (ITS PMO) is to facilitate the delivery of the value promised to our customers in support of the university’s strategic vision via disciplined, performance-based project portfolio management (PPM).

The PMO has established the following goals and key performance indicators to achieve this mission:

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<tr>
<th>GOAL</th>
<th>KEY PERFORMANCE INDICATORS</th>
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<tr>
<td>Strategically align the ITS project portfolio with university missions</td>
<td>All major ITS projects can be linked to one or more specific goals or objectives on the UTHSC Strategic Map.</td>
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<tr>
<td>Provide transparency for IT decision-making, planning, and work</td>
<td>ITS members and the wider university community are aware of the projects on which ITS is working, how we do our work, how projects are chosen, and who to contact for assistance.</td>
</tr>
<tr>
<td>Consistently employ an effective, lightweight project management (PM) framework</td>
<td>ITS utilizes a flexible set of repeatable, measurable, and predictable processes and tools to efficiently accomplish project work.</td>
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<tr>
<td>Serve as ITS’s PPM authority</td>
<td>The PMO is the first point of contact for PM and PPM standards, training, project oversight and strategy, and advice.</td>
</tr>
<tr>
<td>Deliver successful IT projects</td>
<td>Customers use resulting products/services successfully, consistently, in a timely manner, and for the intended purpose. ITS staff are proud of their work and project contributions.</td>
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Through sponsorship by Vice Chancellor for IT and Chief Information Officer (CIO) Dr. Jan van der Aa and supervision by ITS PMO Director Vikki Massey, the PMO gains the following:

- **Authority** to promote ITS-wide organizational change effectively
- **Independence** that can sustain objectivity
- **Oversight** that can keep its work aligned with the organization's business strategy
- **Legitimacy** as it fosters an effective enterprise approach
- **Credibility** to expand the PMO mission and reach

The PMO is staffed through the direct appointment of existing or new ITS staff into the PMO. Some PMO staff members may have a dual reporting line to the PMO and other ITS teams or a single reporting line to another ITS team only.

The PMO operates under this guiding principle: **The success of the PMO is derived exclusively from the success and satisfaction of its customers and the ITS organization.**

NOTE: See Appendix A for definition of terms and concepts used in this document.
INTRODUCTION

Through CIO Dr. Jan van der Aa, ITS has authorized the creation of an enterprise PMO. The purpose of this charter is to establish agreement on key aspects of the PMO.

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 the PMO’s sponsors and primary stakeholders, the services that it offers, and the staffing and support structures required to deliver those services.

SPONSOR

The project to establish the PMO is sponsored by and has the direct approval of Dr. van der Aa.

JUSTIFICATION

Establishment of the PMO arose out of the need to:

- Standardize and better document processes, as noted in multiple audit findings
- Provide consistent IT project portfolio transparency, as indicated by customers’ lack of knowledge of IT work being done
- Increase project planning and risk management, as observed in projects that suffered significant deployment problems due to under-planning
- Reduce rework and production of solutions that do not match user needs, as observed in abandoned or under-utilized ITS-created database applications
- Predict project outcomes in support of resource optimization and planning, as exemplified by over-allocated staff members and unknown resource availability

The purpose in establishing the PMO is to provide a means for eliminating those problems that have arisen due to inadequate or poorly applied PM practice. The establishment of a PMO also carries the possibility of additional benefits, as listed in Appendix B of this document.

VISION

The vision is simple: To satisfy the goals of our customers, university, and ITS. Every time.

MISSION

The mission of the ITS PMO is to facilitate the delivery of the value promised to our customers in support of the university’s strategic vision via disciplined, performance-based PPM.

This creates an environment where:

- Project success is the norm.
- Project teams are proud of their work.
• Customers reap the benefits of a carefully planned investment.
• The university wins through improved service and/or lower cost.

The PMO operates under the following primary guiding principle: The success of the PMO is derived exclusively from the success and satisfaction of its customers and the ITS organization.

PHILOSOPHY

It is critical that ITS staff, customers, and other stakeholders understand the purpose and role of the PMO so it can reach its full potential and value for the organization. Simply stated:

*The PMO is a(n):*
• Advocate for progress
• Change manager
• Doer
• Driver
• Engager
• Learning organization
• Manager of expectations
• (Over)communicator
• (Over)documenter
• Planner
• Satisfaction seeker
• Strategizer

*The PMO is not a(n):*
• Opponent of change
• Paperwork Nazi
• Roadblock to action
• Second boss
• Stifler of creativity

GOALS AND OBJECTIVES

The following PMO goals support the above mission. An accompanying set of objectives specify how each goal will be achieved. For each of these objectives, the PMO will develop one or more “SMART” targets against which to evaluate performance. (SMART = Specific, Measurable, Assignable, Realistic, and Time-related)

Please note this list is not exhaustive. Additionally, implementation of this work will occur in a phased manner.

**GOAL 1: Strategically align the ITS project portfolio with university missions**

• **Objective 1: Establish and facilitate a model for project selection and prioritization.**
  The PMO will work with ITS senior management to establish quantified criteria for choosing and prioritizing project work. Additionally, the PMO will work with other UTHSC departments to encourage strategic planning and prioritization for their projects that require ITS assistance.

• **Objective 2: Assist in the development of ITS strategy.**
  The PMO will work with ITS senior management to articulate the department’s technology plan for the short-, near-, and long-term.

• **Objective 3: Assist with resource management.**
  The PMO will work with ITS senior management to perform capacity planning to optimize use of
organizational resources.

GOAL 2: Provide transparency for IT decision-making, planning, and work

- **Objective 1: Maintain a current project portfolio.**
  The PMO will update and publish a master ITS projects list, to include for each project at least the project status, current phase, and estimated completion. This list will be published monthly or bi-monthly.

- **Objective 2: Maintain a PMO website.**
  The PMO will establish and keep current a website that outlines the PMO’s purpose and work, provides PM information and tools, links to the project portfolio, and lists contact information for PMO staff.

- **Objective 3: Maintain project repositories and an archive.**
  The PMO will be responsible for creating a repository for each project it manages. The repository will contain all documentation associated with that project while it is active. All project team members and engaged stakeholders will have access to the repository. The PMO also will create a project archive, to which each project’s repository will be moved upon project closeout. The archive will be accessible by ITS members only.

- **Objective 4: Maintain a lessons-learned knowledgebase.**
  To encourage improvement through learning, the PMO will create a repository of lessons learned from past projects, including those that failed or were abandoned. The repository will be accessible by ITS members only.

GOAL 3: Consistently employ an effective, lightweight PM framework

- **Objective 1: Develop/acquire and employ an adaptable set of industry-recognized, best-practice PM processes and tools.**
  The PMO will implement and serve as the official source of standard practices, templates, and other project aids to inform the flow and documentation of project work, to be used across all projects. The level of use of these processes and tools will be dictated by the needs and complexity of the project. ITS senior management will provide final approval of the framework. The PMO then will be responsible for ensuring the use of the framework and updating it as necessary to best meet the needs of the organization, reflect ITS’s current level of PPM maturity, and fit the way work is done. All methods and standards will be posted to the PMO website. (Note: The PMO will encourage the use of its published PM methodology in all IT projects. However, the PMO only will enforce its published PM methodology on those projects for which it is accountable for successful project delivery.)

- **Objective 2. Develop/acquire and employ a method of performance-focused project evaluation.**
  The PMO will develop metrics for measuring project success that will be approved by the PMO and ITS senior management. All projects for which the PMO is accountable for successful delivery will be regularly monitored and measured for performance using those metrics. Furthermore, all ITS projects will be encouraged to regularly self-monitor performance and share these performance measurements with project sponsors and stakeholders. See the “Evaluation and Metrics” section of this document for more details.
• **Objective 3**: Lead the selection and administration of an enterprise-level PPM tool for organization-wide use.
  
The PMO will oversee the administration and use of any enterprise-level PPM tools used by ITS. Additionally, the PMO will have ultimate responsibility for ensuring that the tool meets the organization’s needs, and thus be in charge of configuring the tool for maximum use and recommending a change in tool if the current one no longer meets those needs.

**GOAL 4: Serve as ITS’s PPM authority**

• **Objective 1**: Be the resident advocate for PPM best practices in the organization.
  
The PMO will take the lead in espousing and exemplifying the benefits of good PM and PPM, encouraging the use of best practices whenever possible. It also will provide training to all levels of ITS management and staff so that every ITS member understands his/her role in making projects a success.

• **Objective 2**: Train and maintain a core PM team.
  
The PMO team will be composed of ITS staff who work as project managers on IT projects. The PMO will train these project managers in a full range of PM topics and provide mentorship and project assistance as needed. Additionally, where interest is indicated, the PMO will support the efforts of any ITS members who choose to pursue a Project Management Professional (PMP) or other PM/PPM-related certification.

• **Objective 3**: Encourage and help to develop a PM/PPM career track.
  
The PMO will work with ITS senior management as requested to create a career path consisting of PM/PPM roles and responsibilities that reflect the organization’s needs.

• **Objective 4**: Evaluate the work of PMO staff.
  
The PMO will participate in the performance reviews of project managers who report to the PMO on solid or dotted lines.

**GOAL 5: Deliver successful IT projects**

• **Objective 1**: Exercise ultimate accountability for a fruitful project outcome every time.
  
The PMO will do what is necessary to ensure projects’ progress and adherence to scope, schedule, and time targets; high stakeholder engagement; high performance by project teams; and most importantly, high customer satisfaction. For failed and abandoned projects, the PMO will emphasize the positive aspects to ensure some good is achieved.

• **Objective 2**: Provide warning for under-performing or at-risk IT projects.
  
The PMO will notify IT senior management and team members when a project is consistently missing scope, schedule, and time targets. It then will work with the project manager, project sponsor, and project team to make adjustments and provide correction.

• **Objective 3**: Ensure appropriate levels of engagement for project stakeholders.
  
As stakeholder engagement is a critical part of project success, the PMO will ensure that its project managers inform, monitor, request input from, and address the issues of all who have an interest in a project. Projects that do not have a high level of stakeholder engagement despite PMO and project manager efforts to facilitate it will be re-evaluated for priority and relevancy.

• **Objective 4**: Be a neutral party for conflict and issue resolution.
  
The PMO will act as an honest broker for issues brought to the PMO by project managers, listening to and working with all stakeholders to elicit an acceptable outcome and move projects
Objective 5: Develop a rewards and recognition program to acknowledge good work.
To support the PM process and achievement of project goals and objectives, the PMO will employ creative ways to credit those project teams and staff members who contribute to a successful project outcome.

Objective 6: Promote learning to enhance future work.
The PMO will encourage the organization to review lessons learned from past projects, including those that failed or were abandoned, in hopes of improving the results of future projects.

DAILY OPERATIONS

Scope
The PMO will manage all large ITS projects either directly or indirectly and is accountable for successful project delivery. It also may manage smaller projects as needed and as time and resources permit.

As the PMO matures and time and resources permit, at the discretion of the CIO, the PMO may be made available to directly manage non-ITS projects on request. Where such an arrangement is made, the PMO would deal directly with the requesting sponsor, provide PM services for the project, enforce its PM methodology and standards, and be accountable for successful project delivery.

Organizational Structure and Support
The PMO will report directly to the CIO. Through alignment with the CIO’s office, the PMO gains the following:

- Authority it needs to promote ITS-wide organizational change effectively
- Independence that can sustain objectivity
- Oversight that can keep its work aligned with the business strategies of the university and ITS
- Legitimacy as it fosters an effective, enterprise approach
- Credibility to expand the PMO mission and reach

The PMO will report to the CIO on the following at the following intervals:

- Enterprise projects: At least monthly
- Other projects: At least monthly
- Special projects: Upon request
- PMO metrics: Annually
- Issues and opportunities: As they arise

The CIO will take tangible steps to encourage and facilitate PMO success, including the following:

- Provide the PMO with unanimous, visible, and vocal support
- Introduce PMO functions in a phased manner
- Support the process of organizational change
- Recognize PM as a core competency (i.e., as part of the organization's culture)
- Be patient but firm with implementation

Stakeholders
The PMO regards the following as its primary stakeholders:

- **CIO:** To ensure the PMO is meeting his/her goals for the ITS organization
- **ITS functional managers and staff:** To ensure work satisfaction and pride
- **Project sponsors:** To ensure customer satisfaction
- **Other UTHSC vice chancellors:** To ensure alignment with university goals

**Staffing**

PMO staffing will be commensurate with both the objectives of the PMO and available ITS resources. Staffing will be minimal in the beginning but increase as the PMO gains traction and the business need calls for growth. The PMO will have the following permanent staff upon inception:

- **Director (full-time):** One hundred percent (100%) of this position’s time will be dedicated to the PMO. Primary tasks include implementation and oversight of the goals, objectives, and associated work outlined in this charter; organizational and PMO strategic planning; management of enterprise or large ITS projects; direction of PMO project managers and those outside the PMO who act as project managers on IT projects; and administration of the official organization-wide PPM tool(s). This position will report directly to the CIO.
- **PMO project coordinator (full-time):** One hundred percent (100%) of this position’s time will be dedicated to the PMO. Primary tasks include the management of small- to medium-sized projects, assistance with larger or more complex projects, administration of the official organization-wide PPM tool(s), PMO website maintenance, and assistance in developing project templates, tools, and other aids. This position will report directly to the PMO director.
- **PMO project manager (part-time):** An unspecified amount of this position’s time will be dedicated to the PMO. Primary tasks include the management of ITS Information Security projects and other types of projects as time permits. This position will have no formal reporting structure to the PMO, but there will be an understanding between the PMO and the ITS Information Security group, as supported by the CIO, of this position’s PM responsibilities.
- **Non-PMO project managers (part-time):** For projects where the PMO does not have sufficient resources to manage them, that are small in size, or that primarily involve only one ITS group outside ITS Educational Technology or ITS Information Security, a staff member within a non-PMO ITS group may serve as the project manager. In their role as a project manager, these staff members will be encouraged to use the PMO’s prescribed PM methodology and tools and report on the status of their projects on a regular basis defined by the PMO. These staff members will have no formal reporting structure to the PMO, even while acting as a project manager. Instead, the PMO director and the functional manager of the staff member’s group will collaborate to ensure the needs of both the PMO and the group are met throughout the duration of the project.

Currently, ITS’s business analysts are members of the ITS Systems Development group and do not have a reporting structure to the PMO. (This is subject to review and change as the ITS organization’s PPM objectives evolve.) However, they do work closely with the PMO to ensure that user and project requirements are articulated, documented, and correctly reflected in project scope definition and application design.

The PMO will maintain office space for its full-time staff. Part-time staff members will conduct PM work
from their existing offices or from shared multi-use space located elsewhere in ITS. ITS’s common conference rooms will be used for project team meetings and other work as needed.

Definition of Project Success
The PMO, in accordance with the CIO, considers a project to be a success when the following are true:
- Pre-defined business objectives and project goals are met or exceeded (i.e., the project satisfied the need that created it).
- A high-quality product, service, or result is fully implemented AND then utilized effectively and for its intended purpose after the project ends.
- Project delivery meets or exceeds scope, schedule, and cost targets.
- Project participants have pride of ownership and feel good about their work.
- The customer is happy, per defined quantitative and qualitative metrics.
- Project results helped build a good reputation.
- Methods are put in place for continual monitoring and evaluation.

Evaluation and Metrics
PMO performance will be reviewed at least annually. SMART targets also will be evaluated and renewed annually. The CIO and PMO director will agree upon the validity and usefulness of all targets.

The value of the PMO should be directly reflected in the success of projects and customers’ levels of satisfaction. Thus, metrics for measuring PMO efficacy will focus on the following areas:
- Are the organization’s projects more successful over time?
- Is there evidence that ITS staff is taking a more professional approach toward PM practices?
- Are the attitudes of ITS staff and customers regarding project activities and results improving?
- Are the products of the organization’s projects meeting their business objectives?
- Is ITS meeting those business objectives directly aligned with project performance and success?

The PMO will develop or acquire appropriate instruments with which to obtain objective measurements. The CIO will approve the instruments before they are used. Examples include the following:
- Improvement in project success over time can be measured through decreases in schedule and cost variances or the tone of customer comments.
- The PM approach can be measured by quality and timeliness of project planning documents, accuracy of schedule and cost estimates, and effectiveness at managing risk.
- Staff and customer attitudes can be measured through satisfaction surveys conducted at the conclusion of projects.

PROPOSED STRATEGY TO IMPLEMENT THE PMO

The following steps will be conducted to formally establish the PMO:
- Gain the CIO’s formal approval of this document.
- Refine and agree upon PMO performance SMART targets.
- Establish a PMO review process.
- Use the following plan as a guideline to build the PMO in a deliberate, phased manner.
PMO BUDGET
As the current ITS budget is constrained and will continue to be so into the foreseeable future, the PMO will be established using existing staff and cost-free tools and aids. With CIO approval, a small amount of funding can be allocated for PMO staff training and other necessities.

FUTURE OF THE PMO
The PMO as described in this document is only a starting point. The CIO may choose in the future to expand or diminish the scope of services that the PMO provides, depending upon its current and anticipated value. ITS can obtain a regular measure of that value through the use of objective measures (see the “Evaluation and Metrics” section for more detail).
APPENDIX A: GLOSSARY OF TERMS, ACRONYMS, AND ABBREVIATIONS

The following definitions are derived primarily from *A Guide to the Project Management Body of Knowledge, 5th edition,* (PMBOK), a reference of generally accepted PM best practices written and consistently updated by the Project Management Institute (PMI), the world’s leading not-for-profit professional membership association for the project, program, and portfolio management profession.

**Best practice:** A technique or methodology that, through experience and research, has proven to lead reliably to a desired result. A best practice tends to spread throughout a field or industry after a success has been demonstrated.

**Program:** A group of related projects, subprograms, and program activities managed in a coordinated way to obtain benefits not available from managing them individually. Program management is the centralized management of one or more programs.

**Project:** A temporary endeavor undertaken to produce a unique product, service, or result. UTHSC ITS also uses the following criteria to define a project:
- Requires more than 40 hours of work
- Requires resources from 2+ ITS teams (or more than 40 hours of work from one ITS team)
- Has a significant level of impact or complexity
- Is not related to existing daily operations

**Project Management (PM):** The application of knowledge, skills, tools, and techniques to project activities to meet project requirements.

**Project Management Office (PMO):** An organizational structure that standardizes the project-related governance processes and facilitates the sharing of resources, methodologies, tools, and techniques.

**Project Management Professional (PMP):** A leading, industry- and globally-recognized certification for project managers administered by PMI.

**Project Portfolio Management (PPM):** A portfolio is a collection of programs, projects and/or operations managed as a group. The components of a portfolio may not necessarily be interdependent or even related. Portfolio management is the centralized management of one or more portfolios, which includes identifying, prioritizing, authorizing, managing, and controlling projects, programs and other related work to achieve specific strategic business objectives.

**Project Sponsor:** A person or group that provides resources (especially funding) and support for a project, program, or portfolio and is accountable for enabling success; also may be referred to as the “project champion”.

**Scope:** The sum of the products, services, and results to be provided as a project. Scope should be defined both in terms of inclusion (“What is in scope?”) and exclusion (“What is out of scope?”).
“SMART”: This acronym refers to criteria that should be used to set objectives that are easy to understand and discern when they have been achieved. SMART objectives are:

- **Specific**: They target a specific area for improvement.
- **Measurable**: They quantify or at least suggest an indicator of progress.
- **Assignable**: They specify who will do it.
- **Realistic**: They state what results can realistically be achieved, given available resources.
- **Time-related**: They specify when the result(s) can be achieved.

**Stakeholder**: An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project.
APPENDIX B: VALUE OF A SUCCESSFUL PMO TO THE ORGANIZATION

The value of a common organizational PM 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 perceptions of IT organization by clients
- Improved people and resource management
- Reduced time to get up to speed on new projects
- Elimination of the thrash (e.g. false starts, self-defeating conflict, indecision) that often occurs in failing projects
- Greater predictability of project outcomes
- Establishment of meaningful metrics

In addition to the above, a successful PMO does the following:
- Eliminates duplication of data and processes among project managers
- Collaborates with ITS staff to implement effective processes for managing all IT projects
- Cultivates greater levels of cooperation
- Institutes new operating modes with detailed definition of process, roles, and measures
- Promotes change from the status quo, upstream and downstream of the IT mission
- Nurtures organizational neutrality
- Instills a passion for the profession of PM’s processes, practices, and tools

Expected benefits from the PMO for specific customers include the following:
- Senior management
  - Timely feedback about project goals, status, accomplishments, and issues
  - Increased probability of meeting corporate business goals
  - Timely warning about critical issues and possible steps toward resolution
  - Solutions to organizational issues that may hinder project success
  - Periodic data of project actuals
• Functional managers
  o Metrics to ensure staff is performing adequately and projects are on schedule and within budget
  o Increased chances of project success, resulting in less rework and reduced cost of product delivery
  o Maximized use of resources
  o Availability of PM resources when needed
  o Integration of PM methodology into the product methodology
• ITS
  o Promotion of change from the status quo, upstream and downstream of IT mission
  o Assistance in establishing effective processes for managing all IT projects
  o Improved customer perception of the IT organization
• Project managers
  o Improved execution through the establishment of a consistent PM framework
  o Training, mentoring, and career development
• External customers
  o Increased probability of having requirements and expectations met
  o Increased satisfaction
APPENDIX C: PMO SUCCESS FACTORS

The PMO will be more successful in the long-term if the following can be achieved:

- ITS understands the significance of culture, talent, and process to the success of the PMO.
- The PMO functions and services/deliverables are prioritized and implemented in a time-phased manner.
- The organization selects a PMO leader who has the right set of skills and experience.
- A consistent approach to planning and managing projects is implemented across the organization.
- Internal PM training is provided at all levels.
- PM is recognized as a core competency (i.e. as part of the organization's culture).
- The PMO’s balance between project support and control functions is defined and communicated to ensure that departments understand what is expected of them and what they should expect from the PMO.
- The PMO staff understands the culture; the organization intentionally modifies its culture to support its goals.
- The PMO leverages industry standards and best practices.
- The organization defines its strategy; the PMO focuses on those projects central to realization of the strategy.
- The PMO adjusts its operation based on continuous customer feedback.
- The PMO designs a scalable PM system (process and tools).
- The organization adopts a patient but firm approach to implementing PM processes and tools, recognizing that some groups and individuals will embrace PM change better than others.
APPENDIX D: STEPS ITS CAN TAKE TO ENHANCE PROJECT SUCCESS

• Focus on project teams
  o Define the core ITS values for PM (e.g., “Be a team player”). Give special recognition to those who abide by these values.
  o Ensure that ITS staff assigned to projects are given sufficient time to carry out project tasks.
  o Create incentives to help staff overcome their aversion to risk.
  o Give IT an opportunity to gain experience with new (and needed) technologies by funding an ongoing research and development effort.
  o Train existing IT staff in and/or hire new staff with business analysis skills.
  o Provide workshops on effective communication.

• Focus on the ITS organization
  o Articulate a strategic and tactical vision.
  o Prioritize needs and then define immediate, mid-term, and long-term goals.
  o Map proposed projects to goals. Set realistic expectations. Support only those projects with a reasonable chance of successful completion within the defined time.
  o Make “incorporation of an enterprise view in daily work” a core ITS value.
  o Make “be a leader” a core ITS value.
  o Acquire sufficient IT staff to successfully complete and maintain ITS projects.

• Focus on PM
  o Identify ITS staff who have interest in a career in PM. Provide them with both formal training and on-the-job experience.
  o Ensure that novice project team participants receive appropriate training and coaching in the PM methodology.
  o Require thorough project pre-planning.
  o Encourage a culture of continual improvement in PM skills. Use a PM maturity model as an indicator of organizational growth.
  o Make “managing projects for success” a core ITS value
  o Develop in-house expertise in testing, quality control, quality assurance, and business analysis.
  o Apply the PM methodology to all IT projects.
  o Manage risk proactively,
  o Use a formal change management process whenever scope is ill-defined or likely to change.