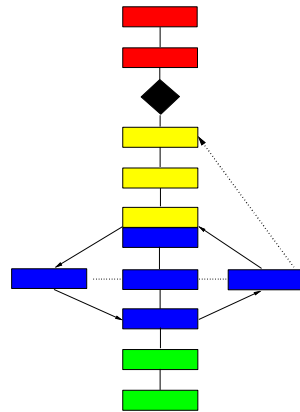# Project Office Guide

MITP
v5.1

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Edition Notice

First Edition (September 1995)

This edition applies to Version C5.0 of Managing the Implementation of the Total Project (MITP), and to all subsequent releases and modifications until otherwise indicated in new editions.

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PREFACE About This Document

This document describes the MITP technique Project Office in terms of:

- What is the Project Office?
- Who uses the Project Office?
- When do you use Project Office?
- How do you use Project Office?

For information about the MITP life cycle, the key techniques, and the support techniques, see the MITP Handbook. A glossary of terms may be found at the back of the MITP Handbook

Who Should Read This Document
This document should be read and understood by all those involved with the Project Office.

How to Use This Document
The table of contents provides a clear roadmap to the main topics outlined in this document, as follows:
- "What is A Project Office?" in topic 1.0 provides an introduction to Project Office.
- "Who Uses The Project Office?" in topic 2.0 discusses the Project Office roles and responsibilities.
- "When Do You Use The Project Office?" in topic 3.0 looks at the Project Office in terms of the four phases of a project, providing a checklist to remind you of the key points to remember through the project life cycle.
- "How Do You Run The Project Office?" in topic 4.0 describes how to set up and maintain the Project Office for your project.
- "Project Office Workshop" in topic A.0 provides a checklist of important points concerning the Project Office Workshop.
- "Project Office Plan" in topic B.0 gives an example of a Project Office plan for a hypothetical project, which you can use as a template for your own Project Office plan.

ISO9000 Control Information

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1   What is A Project Office?

This topic provides an introduction to the MITP concept and technique called Project Office.

Note: The Procedures are contained in the MITP Project Control Book Guide.

The start of a project is a busy time for everyone but none more than the Project Office, which is often under pressure to provide the processes and systems very quickly. During the project startup activity, a reasonable period of time must be spent planning the work and deciding upon priorities to enable a set of good quality processes to be produced. If the work is rushed, or if corners are cut, the effect will be felt throughout the life of the project. However, the time and effort spent must be in proportion to the size and complexity of the project.

This document has been produced to assist the practitioner (in the role of Project Office Manager) and describes a process which will aid the setup of the Project Office. Used in conjunction with the other material in this technique, it will ensure the Project Office is developed in a way which satisfies the requirements of both the Project Manager and the project team.

The output of the process will be a version of the Project Control Book tailored to suit the project either in hardcopy form or automated using the Project Office tools.

Subtopics
1.1   Why Use A Project Office?
1.2   Project Office Structure and Scope

1.1   Why Use A Project Office?

A project, by definition, is usually operating outside the normal business processes and in order for it to be managed effectively it needs to create its own processes which relate to the products or services being delivered.

In many cases there is a large amount of work associated with the creation and the administration of these new processes; also, much of this work needs to be performed at the beginning of the project, which is usually a very busy time for the Project Manager.

The implementation of a Project Office will greatly assist the Project Manager during the start of the project and the continued operation of the Project Office will benefit both the project and the Project Manager throughout the life of the project.

1.2 Project Office Structure and Scope

The role of the Project Office is as follows:
To provide management and administrative support to the Project Manager
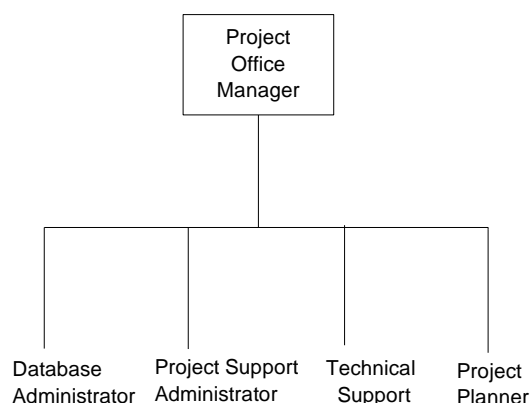
Figure 1. Project Office structure

To effectively fulfil this role, the Project Office must be suitably positioned in the project as shown in the following diagram:
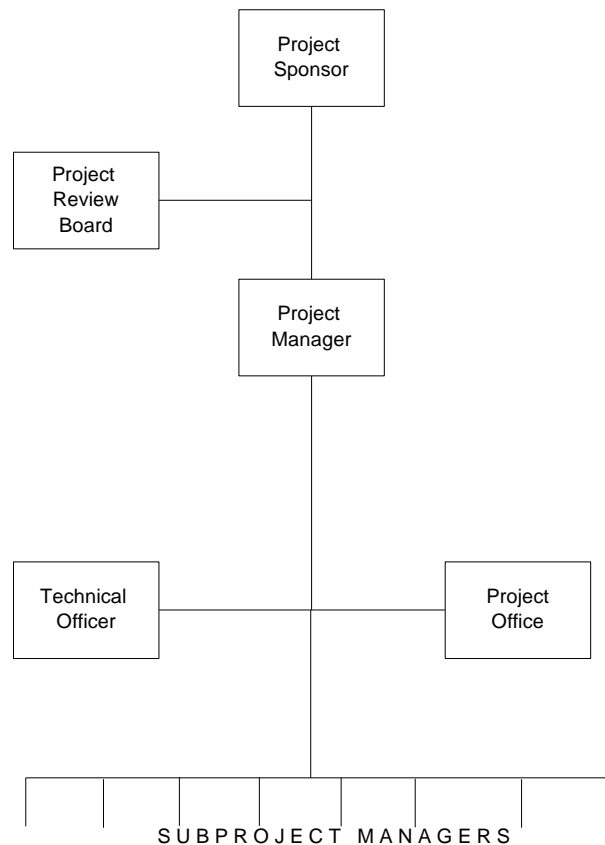
Figure 2. Project Office in Project Structure

The Project Office structure is shown in the diagram below.

Table 1. Project Office Structure		
PROJECT OFFICE MANAGEMENT		
PLANNING AND CONTROL	**INFORMATION MANAGEMENT**	**PROJECT SUPPORT**
PROJECT OFFICE SYSTEMS		

The roles shown above are as follows:
- Planning and Control includes roles such as:
  - Project Planner
  - Site manager
  - Materials control

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- Project engineer
- Information Management includes roles such as:
    - Accountant
    - Database Administrator
    - Quantity surveyor
- Project support includes roles such as:
    - Project Administrator
    - Contracts
    - Purchasing
    - Technical support (for the Project Office)
- Project Office systems are the tools and software used by the Project Office to run the Project Management System

Subtopics
1.2.1   Scope Of The Project Office
1.2.2   The Project Management System (PMS)
1.2.3   Other Factors
1.2.4   Benefits

1.2.1 Scope Of The Project Office

The scope of the Project Office is as follows:

- To provide documented processes for the key areas within the following:
    - Planning and control
    - Database administration
    - Project support administration
    - Project Office systems
- To agree these processes with the project team
- To implement the processes within the project
- To train the Project Office staff in these processes
- To train the project team in these processes
- To stand in for the Project Manager during periods of absence
- To manage the day-to-day project administration
- To own the project processes and procedures (the Project Management System)
- To maintain a central record of all project documentation

The size and structure of the Project Office will vary from one project to the next although the different Project Office roles will be present in every project. They may be combined in different ways and for a smaller project could all be performed by the Project Manager.

In some cases, a quick and efficient setup can only be achieved if a separate development team is used. If the same team is used to both set up and operate the Project Office, there is often an immediate conflict of interest and the project suffers. Even if separate teams are used they should still both be managed by the same person (the Project Office Manager).

The skills deployed in the Project Office should reflect the complexity and importance of the project bearing in mind most projects are introducing fundamental changes in the business. All too often the Project Office is thought of as a filing and photocopying facility and consequently staffed by the wrong people. If the Project Office is to provide management and administrative support to the Project Manager, it should contain people who are capable of doing just that.

The relationship between the Project Manager and the Project Office manager is another vital component in the success of the Project Office, and hence in the success of the project. There must be a high level of trust and respect between them.

It is also important for the whole project to view the Project Office as part of the team and to fully support the processes which the Project Office is managing. Involving the team in the development of the processes will create a sense of ownership of the PMS. Once the team have a feeling of ownership they will also start to trust the processes being implemented. This is more likely to result in the processes being readily used by the team.

1.2.2 The Project Management System (PMS)

The PMS is built for the project during the development of the Project Office and is unique to that project. The PMS is held in the Project Control Book (PCB) and consists of a dynamic set of files with the live project data and a file containing the project processes.

The processes include such things as the following:
- Planning
- Progress management
- Reviews
- Risk management
- Change management
- Issue and problem management
- Quality management
- Financial management
- Work Breakdown Structure
- Deliverables and configuration management
- Completion
- Procedures management
- Filing

.2.3 Other Factors

It is important to recognize that each Project Office is unique! A standard Project Office solution cannot be applied (to what may appear identical projects) without some form of tailoring.

Sufficient emphasis needs to be placed on the work associated with the setting up of the Project Office. During the establishment of the project the development of the Project Office should be treated like any other subproject with its own:
- Plan
- Requirements
- Deliverables

The amount of time spent on setting up the Project Office needs to be in proportion to the size and duration of the project and it is typical for 1/20th of the project duration to be spent on setting up the Project Office.

1.2.4 Benefits

If the Project Office is properly planned and managed it can bring considerable benefits through improved management and administration of the project, in the following ways:

- By managing the collection and analysis of the detailed project information, it will enable the Project Manager to take an overall view of the performance of the project and to focus attention on areas of concern, without adversely affecting activities which are already progressing well.
- By providing a solid base of current information it ensures the necessary data is available to the Project Manager, thus enabling quick and effective project decisions to be made.
- By being involved at the start of the project it helps with the building of the team and provides a common point for some of the more diverse subprojects, bringing the Subproject Managers together in both formal and informal meetings.
- By ensuring the day-to-day project operations are running smoothly, it provides a platform upon which project changes can be more readily assessed and implemented.
- By maintaining a central record of project documentation, it ensures the whole project team is working from a common baseline of information. This assists with communication between team members and ensures coordination of the activities of the project.
- By working closely with the Project Manager and the Subproject Managers, the Project Office is able to provide valuable backup to the Project Manager and to act as the Project Manager's deputy when he or she is out of the office.

2   Who Uses The Project Office?

This topic describes the main roles and responsibilities related to the Project Office, as follows:

- Project Office Manager
- Database Administrator
- Project Support Administrator
- Technical support
- Project Planner
- Project Office consultant

Note: Here, the Database Administrator manages the project database on a large project, and is not the Technical Database Administrator.

Subtopics
2.1   Project Office Manager
2.2   Database Administrator
2.3   Project Support Administrator
2.4   Technical Support
2.5   Project Planner

2.1　Project Office Manager

The Project Office Manager manages the process for setting up the Project Office and provides ongoing support and guidance to the Project Manager in matters relating to the operation of the Project Office.

The Project Office Manager also manages the Project Office team and acts as the interface between the Project Office and the rest of the project.

The Project Office Manager is the owner of the project processes and procedures and is responsible for ensuring the project adheres to them. It is also up to the Project Office Manager to regularly review the processes and modify, delete or add new ones to reflect the changing needs of the project.

Typically the position of the Project Office Manager is that of Personal Assistant or Administrative Assistant to the Project Manager and a significant portion of the working week will be spent with the Project Manager.

The Project Office Manager will deputize for the Project Manager during periods of absence and be able to provide the Project Manager with advice regarding actions to be taken on the project. The Project Office Manager will maintain a detailed and up-to-date knowledge of the operational status of the project.

The Project Office Manager is also responsible for the quality of the Project Office deliverables and will ensure the production of timely and accurate information.

2.2　Database Administrator

The Database Administrator will be responsible for maintaining all the Project Office databases. This includes the updating of data, preparation of reports and security back-up. The Database Administrator will join the Project Office team towards the end of startup and remain through until the end of completion. The Database Administrator will also provide cover for the Project Support Administrator during periods of absence.

2.3   *Project Support Administrator*

The Project Support Administrator, who reports to the Project Office Manager, provides the administrative function for the project and is the main day-to-day interface between the Project Office and the rest of the project team on all administrative matters. The Project Support Administrator will join the team towards the end of the startup phase of the Project Office and remain until part-way through completion.

The responsibilities of the Project Support Administrator will cover collection and distribution of project documents and taking minutes of meetings. The Project Support Administrator will also provide cover for the Database Administrator during periods of absence.

2.4   *Technical Support*

The role of Technical Support is not to be confused with the role of the Technical Office. Technical Support is responsible for developing and maintaining the 'special' systems which are used by the project team to deliver the project. The Technical Office is concerned with the technical architecture of the project deliverables.

The major part of the work occurs during the project startup when the systems are being developed and documented. During MITP Phase 3, Managing the Project, Technical Support is primarily concerned with providing support for the systems and making changes to satisfy the changing needs of the project; at this stage, it is likely to be a part-time role.

2.5   *Project Planner*

The Project Planner is responsible for building and maintaining the overall project plan. The Project Planner is experienced in the use of planning tools, will assist with the development of the Project Office planning process and will support the Subproject Managers with the development of their plans.

The Project Planner will develop a technical appreciation of the project to assist with recognition of discrepancies with the plan and dependencies between subprojects. The Project Planner's experience of project estimating will assist in
 validation of task timescales.

3   When Do You Use The Project Office?

This topic explains when the Project Office is used in the four phases of a project.

It is important for the Project Manager to recruit the Project Office Manager and to do this at the very beginning of the project. The Project Office Manager must be involved (and be seen to be involved) in the decisions of the project.

Subtopics
3.1   Project Phases

3.1   *Project Phases*

This topic looks at the role of the Project Office in the four phases of a project:
- Identifying the project
- Establishing the project
- Managing the project
- Ending the project

The following table shows the typical involvement of the various Project Office team members during the four phases. The roles of the Project Office consultant and the Project Office Manager are often performed by the same person and many of the other roles may be combined, depending on project size. On a very small project all the roles could be performed by the same person. If the project has a tight timescale or if the Project Office team lacks experience, then it can be of benefit to use a separate team for the development of the material from the one running the Project Office. Of course both teams should still report to the same person--the Project Office Manager.

Table 2. Project Office Roles in Project Phases				
Role	Phase 1	Phase 2	Phase 3	Phase 4
Project Office Consultant	⟵———	———⟶	— —	— — ⟶
Project Office Manager		. . . ⟵—	———	———⟶
Project Support Administrator		. . . ⟵—	———	⟶
Database administrator		. . . ⟵—	———	———⟶
Technical Support		. . . ⟵⟶	— —	— — ⟶
Project Planner		. . . ⟵—	———	———⟶

Key:——   ——   Part-time involvement

Subtopics

3.1.1 Tasks of The Project Office Team

The following tables gives a suggested allocation of the tasks to the different Project Office team members (and the Project Manager, if applicable) across the four project phases. The codes used are as follows:

PM   Project Manager

POC   Project Office consultant

POM   Project Office Manager

PSA   Project Support Administrator

DBA   Database Administrator

TS   Technical Support

PP   Project Planner

Note: Here, the Database Administrator manages the project database on a large project, and is not the Technical Database Administrator.

3.1.2 Identifying The Project

TASK	OWNER	DONE?
Define the PO scope and objectives	PM/POM	
Define the PO requirements	POC	
Draft the PO development plan	POC	
Establish the PO structure	POC	

3.1.3 Establishing The Project

TASK	OWNER	DONE?
Recruit the PO staff	POM/POC	
Define the PO facility requirements	POC	
Run the Project Office Workshop	POC	
Agree the PO development plan with the team	POM/POC	
Procure PO equipment/systems	POM/POC	
Obtain PO space/furniture	POM	
Prepare PO team job descriptions	POC	
Develop processes and procedures	POC/PP	
Develop applications	TS	
Review processes, procedures & applications	POM	
Document processes & procedures	POC	
Release processes & procedures for comment	POC	
Educate POM on processes & procedures	POC	
Demonstrate applications	TS	
Document applications	TS	
Train POM, PSA & DBA on use of applications	TS	
Team training on processes & procedures	POM	
Implement approved processes & procedures	POM	
Prepare DOUs, contracts	PM/POC	

3.1.4 Managing The Project

TASK	OWNER	DONE?
Planning		
• Planning assistance to Subproject Managers	POM/PP	
• Development of the overall project plan	PM/POM/PP	
• Updating of project plans	PP	
• Distribution of project plans	PSA	
Tracking & Reporting		
• Updating of time recording data	DBA	
• Updating of purchasing & invoicing data	DBA	
• Preparation of project reports	POM/DBA	
• Collection of subproject reports	PSA	
• Distribution of project reports	PSA	
• Updating of milestone data	• PP	•
• Updating of asset register	• DBA	•
• Updating of deliverables data	• DBA	•
Reviews		
• Attending project reviews	• PM/POM/PSA	•
• PO review meetings	• POM/PSA/DBA/TS/PP	•
• Minutes & distribution	• PSA	•
• Conference room bookings	• PSA	•
• Maintain meetings calendar	• PSA	•
Risk Management		
• Update risk data	DBA	
• Distribution of risk plan	PSA	
• Collection of risk updates	PSA	
• Review of risk plan	POM	
• Action allocated risks	POM	
Exceptions Management		
• Update change data	DBA	
• Update issue data	DBA	
• Distribution & collection of change requests	PSA	
• Distribution & collection of issue forms	PSA	
• Review of change log	POM	
• Review of issue log	POM	
• Action allocated changes & issues	POM	

TASK	OWNER	DONE?
Administration		
• Manage the PO team	POM	
• Maintain the project filing system	DBA	
• Assurance of the PO output	POM	
• Maintain the absence planner	PSA	
• Update the project 'status' board	PSA	
• Distribution of project documents	PSA	
• Review/modify existing processes	POM	
• Maintain/modify project applications	TS	
• Back up project databases	DBA	
• Maintenance of PO hardware/software	TS	
• Review of PO status	POC/POM	
• Audit of PO operations	POC	
• Co-ordinate project communications	PSA	
• Arrange project recognition events	PSA	

3.1.5 Ending The Project

TASK	OWNER	DONE?
Attend completion meeting	ALL	
Establish PO team release plan	POC/POM	
Prepare performance evaluations for PO team	POM	
Record final status in plans	PP	
Ensure time recording up to date	DBA	
For each purchase order and supplier		
Record completion status	DBA	
Confirm final payments made	DBA	
Notify supplier of completion	PM	
Ensure milestone status complete	PP	
Ensure asset register complete	DBA	
Dismantle PO systems	TS	
Arrange for disposal/transfer of PO assets	POM	
Ensure deliverables status complete	DBA	
Prepare financial report	DBA	
Prepare completion report	POM	
Document opportunities for new projects	PM/POM	
Verify contractual requirements met	PM/POM	
Complete project files and archive	DBA	
Dispose of 'other' project records	DBA	
Arrange project completion event	POM	
Measure the benefits	POM/DBA	
Complete the benefits report	POM/DBA	

4   How Do You Run The Project Office?

This topic explains how you set up and maintain a Project Office for your project.

Setting up the Project Office produces the following three Project Office elements:
- Project Management System.   The set of processes and procedures developed to meet the needs of the project.
- The Project Control Book (PCB).A repository containing the Project Management System and a set of dynamic files containing the output of the Project Management System.
- The Project Office Structure.   The team of people who run the Project Management System contained in the PCB.

Figure 3 outlines the major activities associated with starting the Project Office. A description of each activity follows the diagram.

```
┌─────────────────────────┐
│ 1.UNDERSTAND THE        │
│ NATURE OF THE PROJECT   │
└─────────────────────────┘
┌─────────────────────────┐
│ 2.DEVELOP A PROPOSAL    │
│ FOR THE WORKSHOP        │
└─────────────────────────┘
┌─────────────────────────┐
│ 3.RUN THE PROJECT       │
│ OFFICE WORKSHOP         │
└─────────────────────────┘
┌─────────────────────────┐
│ 4.PREPARE PROJECT       │
│ OFFICE PLAN             │
└─────────────────────────┘
┌─────────────────────────┐
│ 5.AGREE PROJECT OFFICE  │
│ PLAN                    │
└─────────────────────────┘
┌─────────────────────────┐
│ 6.MANAGE WORK TO THE    │
│ PLAN                    │
└─────────────────────────┘
┌─────────────────────────┐
│ 7.PROJECT OFFICE        │
│ ESTABLISHED             │
└─────────────────────────┘
┌─────────────────────────┐
│ 8.PROJECT OFFICE        │
│ REVIEW                  │
└─────────────────────────┘
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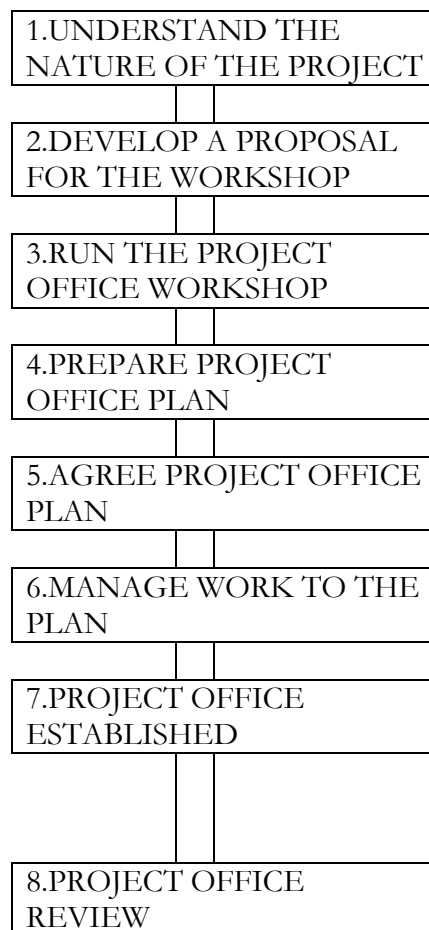
Figure 3. Starting The Project Office

Subtopics
4.1   Understand The Nature Of The Project
4.2   Develop A Proposal For The Workshop

4.1 Understand The Nature Of The Project

Arrange a meeting with the Project Manager to discuss the objectives and scope of the project.

Remember to do the following:
- Focus on the project type:
  - Application development
  - Roll-out
  - Multi-project environment
  - Package installation
- Focus on the project size:
  - Number of people involved
  - Revenue value
  - Project timescale
  - Expected Project Office workload
- Focus on the structure:
  - Internal departments
  - Suppliers
  - Partners
- Focus on the project deliverables:
  - Help to set the scene for what the Project Office will have to support (the Project Office requirements); remember that the role of the project office is to provide support for the Project Manager.
  - To identify the work which needs to be done before the Project Office Workshop, set a date and agree who will be there (refer to "Project Office Workshop" in topic A.0 for additional information).

4.2 Develop A Proposal For The Workshop

Using the information obtained from the meeting with the Project Manager identify the processes which are applicable to the project in question, those which are not applicable and add any others which may be necessary. Refer to the entries for each technique for guidance.

Use this information to tailor the Project Office Workshop foils.

4.3   *Run The Project Office Workshop*

Run the Project Office Workshop (POW) (using the POW foils to help structure the day) to agree on the processes to be developed for the project.

Identify any existing processes and check whether they fully meet the project requirements or need modification.

Follow these basic steps:
- Within the Project Office:
  - Define requirements
  - Agree the processes to be used
  - Develop systems to support these processes.
- Obtain agreement from the total project team on the set of processes required.
- Agree a broad priority order sorting the processes into High, Medium and Low categories and agree how things will be managed before the processes are completed.

4.4   *Prepare The Project Office Plan*

Use the material from the workshop to develop the Project Office plan. Identify the resource available to develop the processes and systems. Include check points and reviews, as necessary.

In a large project with a short startup time it is often advisable to have one person (or team) to develop the material and a separate person (or team) to run the Project Office using the material as it becomes available.

Obtain details for establishing each technique from the appropriate MITP document.

4.5   *Agree Project Office Plan*

Agree the plan with the project team. If you are developing the Project Office under a specific contract, it is appropriate to agree your exit point and exit criteria at this time.

4.6   Manage Work To The Plan

Develop the material in line with the plan, as follows:
- Develop and release processes (using PCB and technique material in the MITP library)
- Select systems and tools
- Define roles and responsibilities
- Educate and train Project Office staff
- Hand over.

Provide feedback to the Project Manager at regular intervals with progress status and issues. Ensure you are included in the project progress meetings.

4.7   Assumptions and Dependencies

Remember to make explicit all assumptions and dependencies, as illustrated by the following list:
- The Project team will approve (subject to comments) the report formats from the schedule database within one week.
- PC hardware as specified in document xxxxxxxxxx will be provided by mm/dd/yy in the Project Office location for the exclusive use of the Project Office team.
- Room nn will be available from mm/dd/yy for sole use by the Project Office team.
- The project requirements can be defined in time to enable the processes to be developed.
- Suitable candidates can be found for the roles of Database Support Administrator, Project Support Administrator and Project Planner.
- There will be only average sickness (under 1 day per month) in the team for the duration of the Project Office development.
- We will not encounter any major technical problems with the planned implementation.

4.8   Draw Up A Schedule

Shown below is a typical project schedule from which you can base the schedule for your project.

The major activities are shown on the following diagram. There will be a two-week period of support after implementation of the last process and a checkpoint review of the Project Office processes X weeks after completion of this schedule.

ID	Task Name	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Mo
1	Establish interim procedures							
2	PO procedures							
3	Recruit staff							
4	Purchase PO h/w and s/w							
5	Planning & etimating							
6	Progress tracking							
7	Progress reviews							
8	Risk management							
9	Change management							
10	Issue management							
11	Fault management							
12	Quality management							
13	Finance management							
14	Work Breakdown structure							
15	Completion							
16	Filing							
17	Checkpoint - key procedures							
18	Checkpoint - PO team & equi							
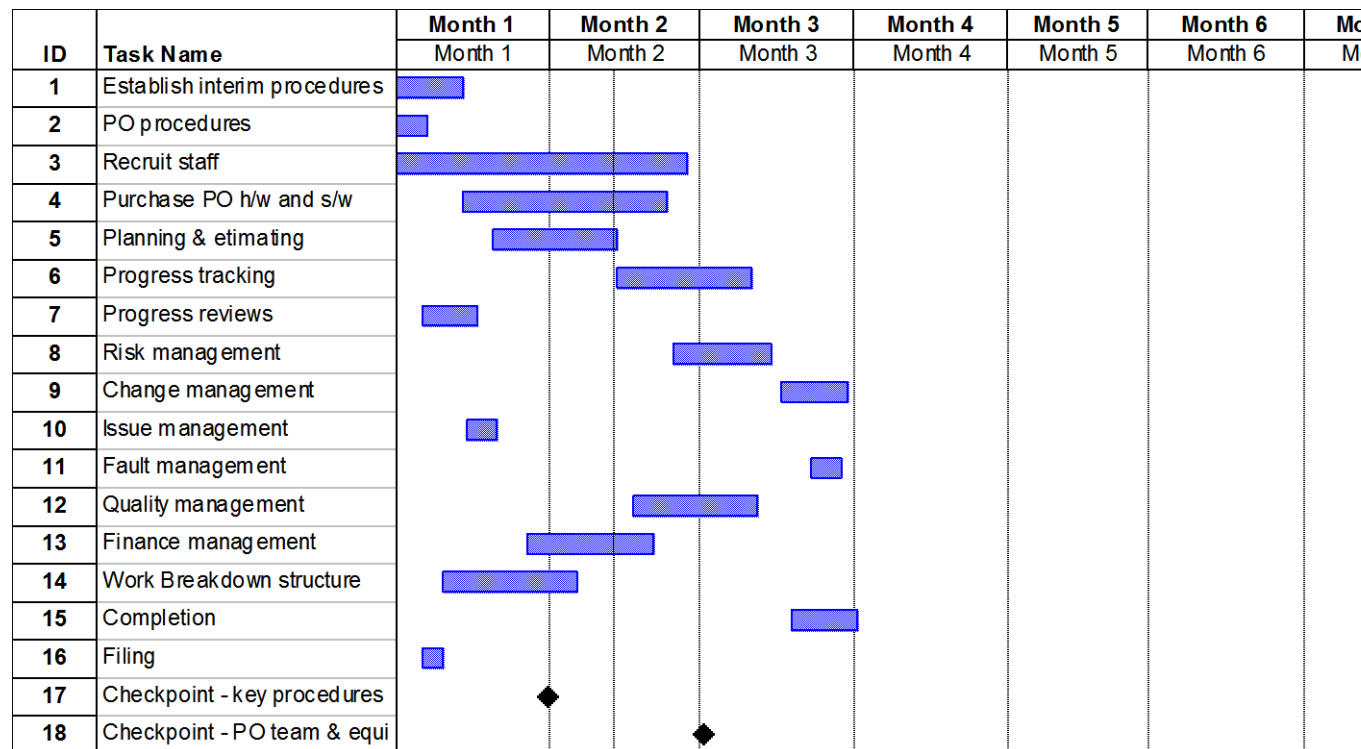
Note: The above includes approval and implementation.

4.9   Project Office Established

When the Project Office is established, do the following:

1. Confirm completion of the Project Office startup with the Project Manager.
2. Document any follow-on work for the Project Office team.
3. Ensure any outstanding issues are resolved.
4. Schedule a review of the Project Office (timing of review depends on the size and complexity of the project).

4.10   Project Office Review

During the review, do the following:

Check to make sure the project and the Project Office are following the developed processes.

1 .Check the list of follow-on work and make sure the top priority items are being addressed.
2 Use the startup checklist as an aid during the review and aim to spend no more than one day on it.
3 Identify any further work required.
4 Send the review report to the Project Manager.

Schedule regular reviews with the team (and Project Manager) on the operation of the Project Office and the effectiveness of the processes, because they will vary as the project evolves and place greater demands on the Project Office. But avoid unnecessary change because this will disrupt the routine of the Project Office.

However, projects are all about change and the Project Office must be able to adapt to this change. The requirements of the Project Office can alter as the project moves from one phase to the next:

- Completion of development
- Start of roll-out
- Start of system test
- Introduction of a major change

Consider running a repeat of the initial startup workshop to clarify the processes required and the role of the Project Office.

4.11 Running The Project Office

A proper startup and clear definition of the responsibilities of the Project Office team members will greatly assist with the smooth running of the Project Office.
In many cases the Subproject Managers do not understand the need for, and the role of, the Project Office. It is seen to be an obstruction to progress, a bureaucratic machine creating forms and paper to justify its own existence! Be aware of this and spend time early on with the Subproject Managers to explain the role of the Project Office and, if necessary, give a presentation using a modified version of the Project Office Workshop Foils and Notes. Look for ways in which the Project Office can make the life of the Subproject Manager easier (and how the lack of it would make life harder) and use them to reinforce the message A close working relationship with the Project Manager and a detailed understanding of the project will help a great deal.

A good method of working is for the Project Office Manager and the Project Manager to meet at a set time each day for a maximum of 15 minutes. The purpose of this meeting is to exchange information and actions. It is an opportunity for the Project Manager to pass to the Project Office Manager actions from meetings, and for the Project Office Manager to feed back the outcome of previous actions. It gives the Project Office Manager an opportunity to obtain a signature for project documents and discuss new issues, risks and changes. It is also a time when they can ensure they have a common understanding of the project status.

The Project Office (and especially the Project Office Manager) should be pro-active. Do not wait for the Project Manager to ask for a list of outstanding issues, or ask if there are deviations from the plan; instead, raise these points with the Project Manager when they occurs and give suggested solutions as well.

The Project Office Manager should move freely around the project team and be able to discuss project matters at both sponsor level (that is, standing in for the Project Manager) and at subproject level. Often the informal approach of a Project Office Manager can be used effectively to understand the views and opinions of the team and prepare the ground for some of the Project Manager's decisions. But this must, of course, be done with the agreement of the Project Manager and, therefore, there is a need for the Project Office Manager and the Project Manager to develop a good working relationship in the early days of the project.
Set yourself targets for production of reports, turnaround times on issues, changes, and so on and monitor the overall performance of the office. Also, maintaining an office diary (or wall planner) will ensure there is always adequate cover in the office.

But beware of becoming the projects' runner. The role of the Project Office is by its nature wide ranging but the Project Manager and the Subproject Managers can take advantage of this. You need to be able provide a service without being subservient.

4.12 Project Completion

The Project Office has a major part to play during project completion. In many respects completion is more difficult to manage than startup, mainly because the enthusiasm and anticipation present at the start is often lacking at the end. In many cases the team will have worked hard to bring the project in on time (or contain slippage) and often feel the job has been done, forgetting about the paperwork which needs to be completed.

Keeping up-to-date with the work during the project makes the task of completion much easier.

Plan the completion work in the same way that startup was planned. It may not be necessary to hold a workshop but as a minimum schedule a meeting with the Project Manager to agree the order in which the:

- Processes can be terminated
- Project records can be archived
- Equipment disposed of
- Staff released

4.13 Measuring The Benefits

It is becoming more common for projects to have a benefits subproject but there are still many instances when this work is left to the Project Office.

The benefits which the project will deliver should be clearly defined in the business case before the project starts.

Benefits management is not just measuring the effect the project has on the business but is also concerned with ensuring the benefits are realized by the business. This opens up the issue of user commitment to the project (which will not be covered here) but it is quite usual (in the case of a headcount reduction for example) for the end-user manager not to willingly deliver that reduction. These problems must be anticipated and processes or agreements put in place to address them. For example, in the case of a headcount reduction a common technique is to draw up a Service Delivery Agreement committing the user manager to reduce headcount in line with improvements in output brought in by the project.

This raises another problem of ensuring you know (and can demonstrate) that the benefits have occurred as a direct result of your project and not other changes in the business or other projects.

Benefits fall into one of four categories, as illustrated in the following table.

	DIRECT	INDIRECT
TANGIBLE		
INTANGIBLE		

Tangible benefits include the following:

- A saving of money

- A headcount reduction of nnn people
- An increase of Y% in output
- A reduction of Z% in rejects

Intangible benefits include:
- Improved staff morale
- Improved client satisfaction
- Better company image

Direct benefits include:
- Ones on which the business case is based and are produced as a direct result of the project.

Indirect benefits include:
- Ones which come about as a result of the project but were not planned or identified in the business case.

Note: It is important to know what the sponsor considers to be the most important benefit, ensure you understand it and are able to measure it.

The work of benefits management starts when the project starts. Each benefit should be related to a deliverable (or set of deliverables) and the projected growth of the benefit plotted against time. Often most of the benefits are not delivered until several months after project completion and for this reason project cost increases or project delays can seriously affect the benefits (and the business case).

Measurement of the tangible benefits is reasonably straightforward. A method needs to be established for measuring the actual benefit and comparing it against the predicted benefit. This may involve setting up separate accounting systems to capture the data specifically related to a deliverable. Or you may need to obtain access to parts of the existing Management Information System.

Measurement of the intangible benefits is more difficult. How do you know if morale has increased as a result of the new system or if it was because of a recent pay increase? These benefits can only be determined by taking regular readings or measurements over a long period of time and allowing for adjustments because of other projects or business decisions. The usual way is to use questionnaires but beware of issuing too many too often, people will lose interest and not complete them accurately. Whether you actually mention the project in the questionnaire depends on the project and the situation in which it is being delivered.

Subtopics
4.13.1   Poachers

4.13.1 Poachers

Other projects are a continual concern to the benefits manager. A new project may be started which is based on one of your early deliverables, consequently one of its indirect (or maybe even its direct) benefits could be the same as one of your major direct benefits. This immediately threatens the validity of your business case and puts into question the future of your whole project; it may cause it to be cancelled.

4.14 Deliverables

This Project Office Development project will deliver:
- A Project Control Book (PCB) for the project with the processes developed, installed and working.
- Trained Project Office staff.

A.   Appendix A. Project Office Workshop

This appendix outlines the work to be done by the Project Office Manager or consultant in preparation for the Project Office Workshop. It should be read in conjunction with Project Office Foils and Notes.

The objectives of the Project Office Workshop are as follows:
- To obtain agreement from the key project members on the processes which are required to support the project.
- To allocate a priority level to each process (high, medium, or low).
- To obtain commitment to support the development and implementation of the Project Office processes.
- To provide sufficient data to enable a Project Office Development Plan to be produced.

The following topics provide a checklist to remind you of the key points at each stage of the preparation, running and follow up to the workshop.

Subtopics
A.1   PO Workshop Prerequisites
A.2   Foil Preparation
A.3   On the Day
A.4   After the Day

A.1   PO Workshop Prerequisites

Item	Confirmed
Meeting with the Project Manager to agree objectives and scope	
Budgetary approval has been given to enable the work to continue after the workshop	
Resource can be provided to assist/develop the processes and systems	
A room or area has been provided in which the Project Office can be situated	
The project has been fully defined, that is, a Project Definition Report exists	
Key team members have been appointed	
The workshop room is suitable for the workshop	
You have all the necessary 'supplies', such as flip chart, pens, overhead projector and so on.	
'Student' handouts for the workshop attendees (remember it is a planning session not a presentation)	

A.2   Foil Preparation

Item	Confirmed
Modify as necessary the source file of Project Office Foils and Notes to produce the foils for the day	
Review the foils with the Project Manager before the workshop	
Use the foils to "set the scene" but do not present it as a final solution. You need to ensure that everyone at the workshop feels they have contributed to the final output of the session	
Remember, not everyone fully understands or appreciates the value of the Project Office or even the need for it. Part of the purpose of the workshop is to get this message across	
It is worth developing your own thoughts in advance in case the session needs some direction, part of your role on the day is to give guidance and ensure the output is reasonable and practical	

A.3 On the Day

Item	Confirmed
Arrive early	
Ensure it starts on time	
Make sure everyone knows the purpose of the day	
Make sure everyone knows each other and their roles (including yours)	
Do not spend too long on the introduction	
Make sure you maintain control, do not let the Project Manager take it over	
Spend some time describing each of the proposed processes(if necessary)	
Agree on a target date for issue of the plan containing the output of the workshop	

A.4 After the Day

Item	Confirmed
Check for any inconsistencies which may have been overlooked during the workshop and resolve them immediately	
Modify the Project Office plan template shown in "Project Office Plan" in topic B.0 and issue it as soon as possible while it is fresh in everyone's mind	
Obtain signoff of the plan from the Project Manager	

B.   Appendix B. Project Office Plan

This appendix contains an example of a plan for the development of a Project Office and can be used as a template for producing a plan for an individual project.

The plan is for a hypothetical project called 'Project XYZ' and is based on plans taken from real projects, to give an example of the type of document which often needs to be produced. Project XYZ is a complex development project with roll-out to a number of sites and has an estimated overall duration of five years.

To cover the majority of cases, Project XYZ has been devised with a large Project Office team, although this is not necessarily typical.

Subtopics
B.1   Preface
B.2   Objectives
B.3   Scope
B.4   Deliverables
B.5   Human Resources
B.6   Organization
B.7   Responsibilities
B.8   Project Office Roles
B.9   Assumptions and Dependencies
B.10   Schedule

B.1   Preface

Changes from Previous Versions

Last Version Date	New Version Date	Change No	Page No.	Changes
	01/22/95	-	-	First release

Document Takes Input From:
Project XYZ--Project Definition Workshop

Document Outputs To:
Project XYZ--Overall Project Plan

Document Approval:

--------------- Project Manager ---------- Date

B.2   Objectives
The objectives of the Project Office subproject are to:
- Identify all the processes which will be required
- Develop and implement the key processes for the project
- Provide the systems for the operation of the Project Office
- Document the processes

B.3   Scope

The scope of the Project Office development is:

- To provide documented processes for the key areas within the following:
    - Planning and control
    - Database administration
    - Project support administration
    - The Project Office systems
- To agree these processes with the project team
- To implement the processes within the project
- To train the Project Office staff in these processes
- To train the project team in these processes
- To provide documentation for the use and support of the processes and systems

B.4   Deliverables

This Project Office Development project will deliver the following:

- A Project Control Book (PCB) for the Project XYZ with the processes developed, installed and working.
- Trained Project Office staff.

This topic provides details of the project team, organization and responsibilities.

B.5 Human Resources

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                        ┌──────────────┐
                        │   Project    │
                        │   Sponsor    │
                        └──────┬───────┘
                               │
    ┌──────────────┐           │
    │   Project    │           │
    │   Review     ├───────────┤
    │   Board      │           │
    └──────────────┘           │
                        ┌──────┴───────┐
                        │   Project    │
                        │   Manager    │
                        └──────┬───────┘
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    │  Technical   │           │          │   Project    │
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           S U B P R O J E C T   M A N A G E R S
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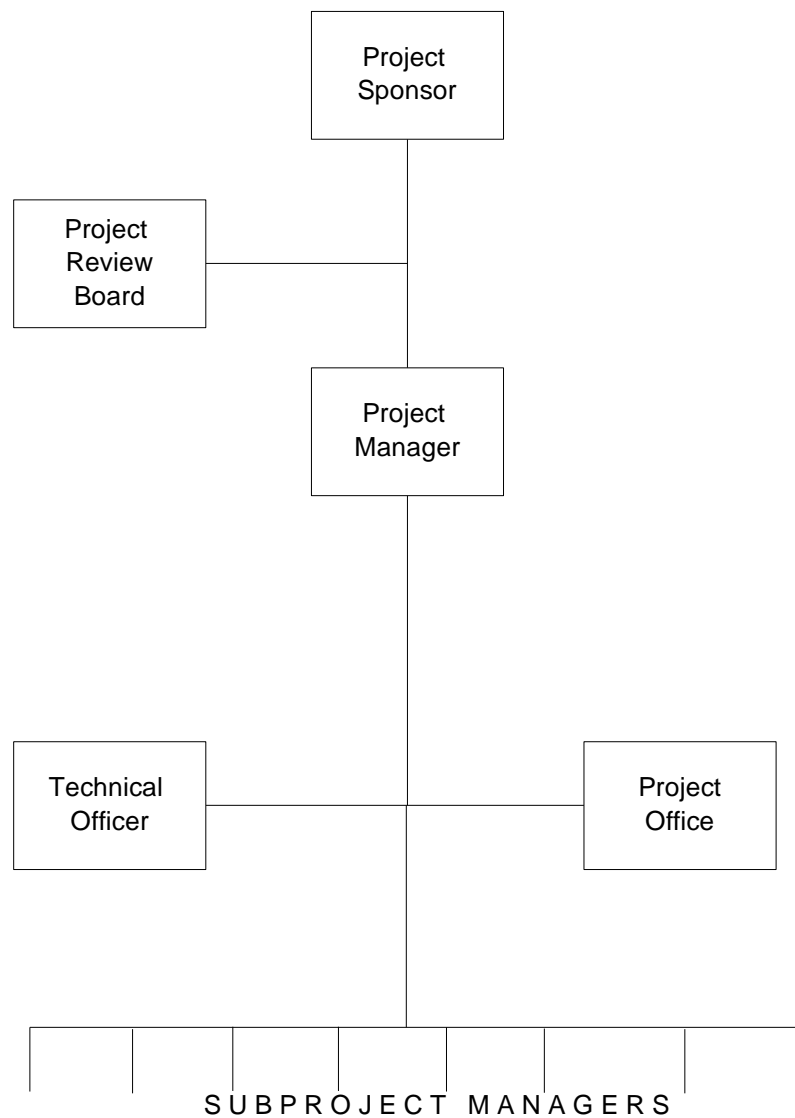
Figure 4. Project Team
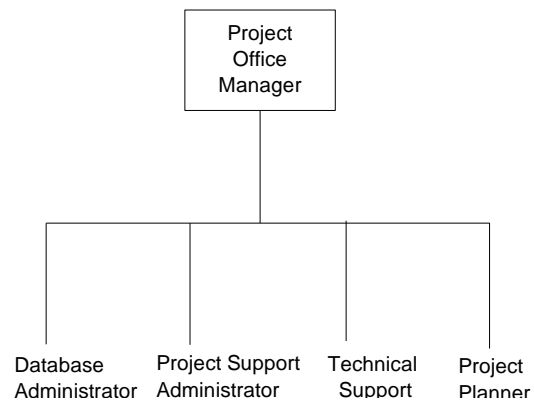
B.6   Organization

Figure 5. Project Office Structure

B.7   Responsibilities

The role of the Project Office can be considered in four phases:
- Identifying the project
- Establishing the project
- Managing the project
- Ending the project

The following table summarizes the involvement of each Project Office team member during the four phases.

Role	Phase 1	Phase 2	Phase 3	Phase 4
Project Office Consultant	←———	———→	— —	— — →
Project Office Manager		. . . ←—	————	———→
Project Support Administrator		. . . ←—	————	——→
Database administrator		. . . ←—	————	———→
Technical Support		. . . ←→	— —	— — →
Project Planner		. . . ←—	————	———→

Figure 6. Project Office Roles in Project Phases

Key: - - - - Part-time involvement

B.8   Project Office Roles

This topic provides detailed descriptions of the following Project Office roles and responsibilities:
- Project Office Manager
- Database Administrator
- Project Support Administrator
- Technical support
- Project Planner
- Project office consultant

Subtopics
B.8.1   Project Office Manager
B.8.2   Database Administrator (to be appointed)
B.8.3   Project Support Administrator (to be appointed)

B.8.4   Technical Support
B.8.5   Project Planner (to be appointed)

B.8.1 Project Office Manager

The Project Office Manager manages the process for setting up the Project Office and provides on-going support and guidance to the Project Manager in matters relating to the operation of the Project Office.

The Project Office Manager also manages the Project Office team and acts as the interface between the Project Office and the rest of the project.

The Project Office Manager is the owner of the project processes and procedures and is responsible for ensuring the project adheres to them. It is also up to the Project Office Manager to regularly review the processes and modify, delete or add new ones to reflect the changing needs of the project.

Typically the position of the Project Office Manager is that of Personal Assistant or Administrative Assistant to the Project Manager and a significant portion of the working week will be spent with the Project Manager.

The Project Office Manager will deputize for the Project Manager during periods of absence and be able to provide the Project Manager with advice regarding actions to be taken on the project. The Project Office Manager will maintain a detailed and up to date knowledge of the operational status of the project.

The Project Office Manager is also responsible for the quality of the Project Office deliverables and will ensure the production of timely and accurate information.

B.8.2 Database Administrator (to be appointed)

The Database Administrator will be responsible for maintaining all the Project Office databases. This includes the updating of data, preparation of reports and security backup.

The Database Administrator will join the Project Office team towards the end of the startup phase and remain until the end of project completion.

The Database Administrator will also provide cover for the Project Support Administrator during periods of absence.

B.8.3 Project Support Administrator (to be appointed)

The Project Support Administrator will provide the administrative function for the project and is the main day-to-day interface between the Project Office and the rest of the project team on all administrative matters.

Reporting to the Project Office Manager, the Project Support Administrator will join the team towards the end of the project startup activity of the Project Office and remain until part-way through project completion.

The responsibilities of the Project Support Administrator will cover collection and distribution of project documents and taking minutes of meetings.

The Project Support Administrator will also provide cover for the Database Administrator during periods of absence.

B.8.4 Technical Support

The role of Technical Support is not to be confused with the role of the Technical Office. Technical Support is responsible for developing and maintaining the 'special' systems which are used by the project team to deliver the project. The Technical Office is concerned with the technical architecture of the project deliverables.

The major part of the work occurs during the project startup activity when the systems are being developed and documented. During the Operation phase Technical Support will be primarily concerned with providing support for the systems and making changes to satisfy the changing needs of the project; at this stage, it is likely to be a part-time role.

B.8.5 Project Planner (to be appointed)

The Project Planner is responsible for building and maintaining the Overall Project Plan. The Planner is experienced in the use of planning tools, will assist with the development of the Project Office planning process and will support the Subproject Managers with the development of their plans.

The Planner will develop a technical appreciation of the project to assist with recognition of discrepancies with the plan and dependencies between subprojects. The Planner's experience of project estimating will assist in validation of task timescales.

HUMAN RESOURCES SPECIFICATION	Project XYZ - Project Office	
Author- C Kent	Date- 01Jan95	Page 1 of 1
Name/title- Clark Kent PO Manager	Start date: End date :	
Responsibilities/skills- To plan and coordinate the Project Office development. To ensure all the necessary processes are identified and that the critical ones are developed by To ensure adequate documentation is provided. To raise any issues with the **** project team. To develop and document the following processes: Procedures, Issue Mgmt, Quality Mgmt, Risk Mgmt To recruit the PO staff. To provide team training on processes and procedures To implement approved processes and procedures. To manage the Project Office. To review and modify existing procedures To stand in for the Project Manager during periods of absence		

Non-project activities	Hrs/week	Non-task activities	Hrs/week
Sickness	2	Project admin	5
Other projects		Project meetings .	..10
Education		Quality control .	...2
Dept Responsibilities....	3	Travel ...	.2
		Support to others ..	..2

Non-project activity tota	l5 hrs	Non-task activity total	21 hrs
Total hours/week-	37 hrs	Task hours/week-	11 hrs
Courses- None			
Holidays- Bank holidays only.			

Figure 7. Human Resources Specification Form (PO Manager)

HUMAN RESOURCES SPECIFICATION	Project XYZ - Project Office	
Author- C Kent	Date- 01Jan95	Page 1 of 1
Name/title- Bruce Wayne Technical Support	Start date: End date :	
Responsibilities/skills- To develop and document a PC scheduling and reporting system based on the Project Office platform. To train the PO team in the use of the platform & tools. To produce a user guide for the platform & tools. To develop and document the schedule management process. To install the PO applications.		

Non-project activities	Hrs/week	Non-task activities	Hrs/week
Sickness	2	Project admin	1
Other projects		Project meetings .	..
Education	3	Quality control .	
Dept Responsibilities....		Travel ...	.5
		Support to others ..	..
Non-project activity tota	5 hrs	Non-task activity total	6 hrs
Total hours/week-	37 hrs	Task hours/week-	26 hrs

Courses- None
Holidays- Bank holidays only.

Figure 8. Human Resources Specification Form (Technical Support)

HUMAN RESOURCES SPECIFICATION	Project XYZ - Project Office	
Author- C Kent	Date- 01Jan95	Page 1 of 1
Name/title- To be recruited Project Planner	Start date: End date :	

Responsibilities/skills-
TO BE FINALIZED, BUT INITIALLY-
To develop and document the following processes-
       -Work breakdown structure,
       -Planning,
       -Progress tracking.
To develop the overall project plan.
To support the Subproject Managers with the development of their plans.

Non-project activities	Hrs/week	Non-task activities	Hrs/week
Sickness	2	Project admin	
Other projects		Project meetings .	1
Education		Quality control .	...
Dept Responsibilities....	3	Travel ...	.
		Support to others ..	..
Non-project activity tota	5 hrs	Non-task activity total	1 hrs
Total hours/week-	35 hrs	Task hours/week-	29 hrs

Courses- None
Holidays- Bank holidays only.

Figure 9. Human Resources Specification Form (Project Planner)

B.9 Assumptions and Dependencies

This plan is based on the following assumptions and dependencies:

The Project XYZ team will approve (subject to comments) the report formats from the schedule database within 1 week.

1. PC hardware as specified in document xxxxxxxxxx will be provided by mm/dd/yy in the Project Office location for the exclusive use of the Project Office team.
2. Room nn will be available from mm/dd/yy for sole use by the Project Office team.
3. The project requirements can be defined in time to enable the processes to be developed.
4. Suitable candidates can be found for the roles of Database Support Administrator, Project Support Administrator and Project Planner.
5. There will be only average sickness (under 1 day per month) in the team for the duration of the Project Office development
6. We will not encounter any major technical problems with the planned implementation.

B.10   Schedule

The major activities are shown on the following diagram. There will be a two-week period of support after implementation of the last process and a checkpoint review of the Project Office processes X weeks after completion of this schedule.
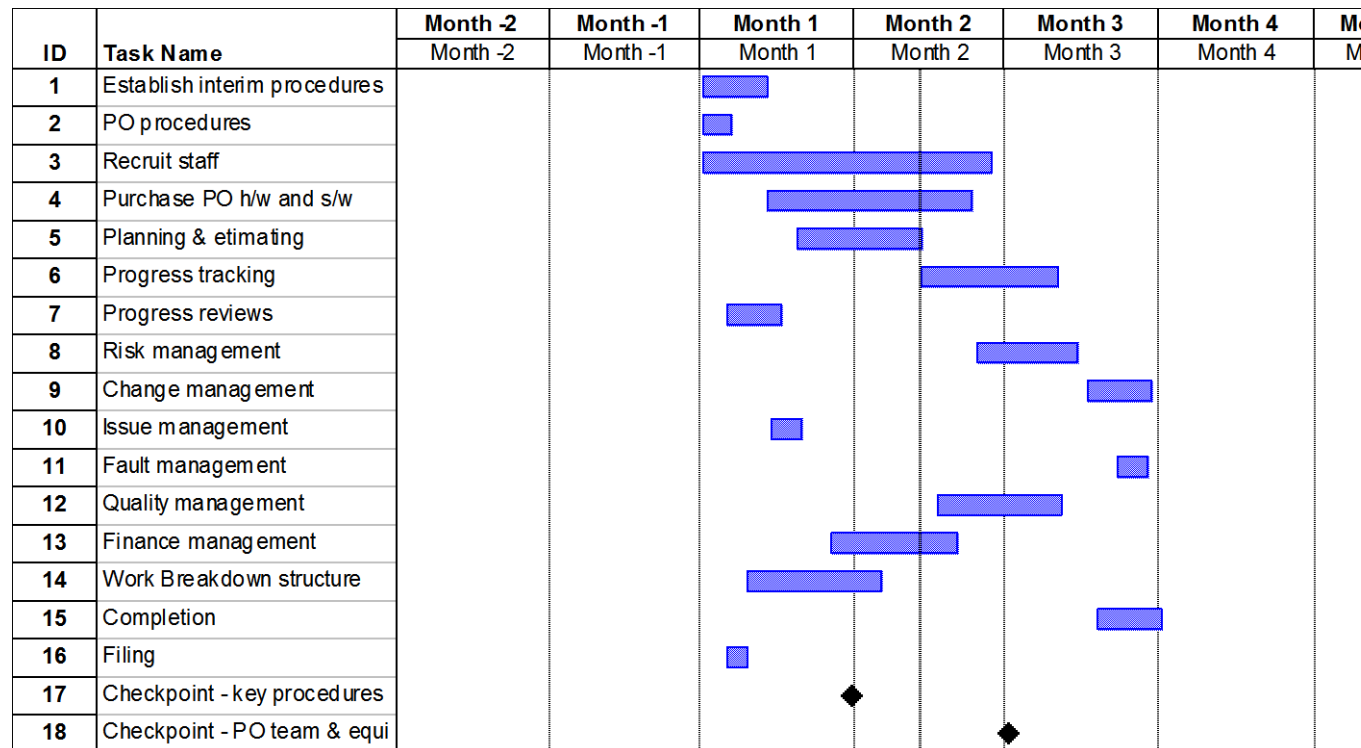
ID	Task Name	Month -2	Month -1	Month 1	Month 2	Month 3	Month 4	M
		Month -2	Month -1	Month 1	Month 2	Month 3	Month 4	M
1	Establish interim procedures			▨				
2	PO procedures			▨				
3	Recruit staff			▨▨▨▨				
4	Purchase PO h/w and s/w			▨▨▨				
5	Planning & etimating			▨▨				
6	Progress tracking				▨▨▨			
7	Progress reviews			▨				
8	Risk management				▨▨			
9	Change management					▨		
10	Issue management			▨				
11	Fault management					▨		
12	Quality management				▨▨			
13	Finance management			▨▨				
14	Work Breakdown structure			▨▨				
15	Completion					▨		
16	Filing			▨				
17	Checkpoint - key procedures			◆				
18	Checkpoint - PO team & equi				◆			

Figure 10. Example schedule

Note: Includes approval and implementation.

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Readers Comments

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Project Office Guide
Version C5.0

Publication No. MICG1POF

Overall, how satisfied are you with the information in this book?

Legend:
1   Very satisfied
2   Satisfied
3   Neutral
4   Dissatisfied
5   Very dissatisfied

	1	2	3	4	5
Overall satisfaction					

How satisfied are you about the information this book contains:

	1	2	3	4	5
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Complete					
Easy to find					
Easy to understand					
Well organized					
Applicable to your task					

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