AGENDA

• Session Details
• PMO Definition
• PMO Charter
  • Charter details
• PMO Lifecycle and Membership
• PMO Activities & Meetings
• Tools and Artifacts
• Interaction with PAPs and PAP Lifecycle
  • Creation
  • Working life
  • Closeout
• Summary
• Q & A
SESSION DETAILS

• Instructional Breakout teaching PMO and PAP Project Lifecycle
• Questions
  • In-Person, raise hands and be recognized
  • Phone, wait until end and we will open up the line
• Virtual attendance
  • Registration: [www2.gotomeeting.com/register/281412090](http://www2.gotomeeting.com/register/281412090)
    • Phone number will be exposed once you have registered


PMO Definition

• PMO:
  • ‘Program Management Office’ or ‘Project Management Office’

• A centralized body with authority to coordinate and implement Projects controlled by the organization creating the PMO
  • A “PMO Charter” authorizes the PMO to undertake specific activities and can be very strict or very broad

• PMO activities concern a group of related projects

• PMO is active only as long as the projects it oversees are active
  • If there are no projects to oversee, PMO goes inactive
**PMO Charter**

- PMO Charter is the basic set of “bylaws” under which the PMO operates.
  - It can be a bullet list of items, or a long detailed document
  - Posted on PMO TWiki page
- Issued by the authorizing organization
- Gives independence and legitimacy to the PMO
- Basic benefits of having a PMO:
  - Consistent delivery of services to the customer.
  - Optimized use of resources.
  - Enhanced communications.
  - Heightened team collaboration.
  - More effective execution of PAP projects.
  - Faster identification of risks, issues, and concerns with better opportunities to address them.
PMO CHARTER (CONT’D)

• PMO is the SGIP’s centralized coordinating body with authority to implement and monitor Priority Action Plans (PAPs)
• The PMO exercises PAP oversight based on requirements defined by the SGIP Governing Board
• The PMO ensures each PAP accomplishes goals in a timely manner by:
  • Leveraging project management tools to track progress and balance resources, schedule and budget
  • Supporting PAP leads such as Technical Champions
  • Maintaining PAP integrity by managing scope changes
• The PMO oversees the Program based on managing cross-PAP dependencies and issues
PMO Charter Document Sections

• Executive Summary
• Authorization and Organization
• PMO Justification
• PMO Mission
• PMO Objectives and Responsibilities
• PMO Stakeholders and Members
• PMO Strategy
• Resource Planning
• Communications Plan
• Recordkeeping
• Glossary
PMO CHARTER DOCUMENT (CONT’D)

• Mission
  • “To create a disciplined project management framework to perform and complete work in a timely manner, and provide accurate status reporting by the individual SGIP projects until all projects have been completed”

• Critical Activities
  • Identify opportunities for standards acceleration;
  • Understand the status of ALL Priority Action Plan Projects;
  • Provide consistency and structure;
  • Provide assistance and help when obstacles, risks, issues, or concerns are identified.
PMO CHARTER (CONT’D)

• Success factors
  • Clear, accurate, timely reporting of status for all SGIP projects
  • Immediate PAP status availability to all SGIP members through the TWiki;
  • Consistent approach to PAPs with clear lifecycles to include a beginning and an end
  • Consistent reporting for all PAPs
  • Reporting of both successes, as well as issues that need addressing on a timely basis
  • Identification of technical resources deserving recognition for exceptional work
  • Ability to modify format on all the PAP websites as needs arise from the Technical Champions
  • Use of standardized project management tools to aid in administering and tracking the work, such as business process diagrams (flow charts), Quad Chart reports, checklists, Gantt charts, etc.
**PMO: High-Level Lifecycle**

- PMO is formed to manage multiple projects
- PMO goes inactive after the last Project is closed out
PMO: Organization

- Approved on February 19, 2010
# PMO Leadership Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Function / Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul Boynton</td>
<td>NIST</td>
<td>NIST COTR</td>
</tr>
<tr>
<td>David Hardin</td>
<td>Invensys</td>
<td>SGIP SGAC liaison</td>
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<tr>
<td>Alan Greenberg</td>
<td>Boeing</td>
<td>CSWG</td>
</tr>
<tr>
<td>Dave Hardin</td>
<td>Invensys</td>
<td>SGAC</td>
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<tr>
<td>Mark Klerer</td>
<td>QualComm</td>
<td>SGIP Plenary Vice Chair</td>
</tr>
<tr>
<td>Wayne Longcore</td>
<td>Consumers Energy</td>
<td>SGIP Governing Board liaison</td>
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<tr>
<td>Paul Molitor</td>
<td>NEMA</td>
<td>SGIP Plenary Secretary</td>
</tr>
<tr>
<td>John Simmins</td>
<td>EPRI</td>
<td>SGTCC</td>
</tr>
<tr>
<td>Steve Widergren</td>
<td>PNL</td>
<td>SGIP Plenary Chair</td>
</tr>
<tr>
<td>Stuart McCafferty</td>
<td>EnerNex</td>
<td>SGIP Administrator / PM</td>
</tr>
<tr>
<td>Ralph Navarrete</td>
<td>EnerNex</td>
<td>Deputy PM</td>
</tr>
</tbody>
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MEMBERSHIP EXPECTATIONS

• Monthly meetings
  • Open to SGIP members
  • ~2 hours (shorter if we can get report outs quicker)
  • Review ALL PAP Quad Charts
    • Look for visual queues
    • LED colors:
      • Green check box – complete
      • Green – on target
      • Yellow – caution
      • Red – late
    • Focus on the Issues, Concerns, and Help Needed
      • Look for opportunities to step in and help
    • Look for opportunities to ACCELERATE

• SGIP Meeting support
  • F2F
  • Virtual

• PAP awareness
  • Know the PAPs
  • Interact with the PAP leadership
  • Be there to help

• 4 – 8 hours monthly
PMO Day-to-Day Activities

• Project Management methodology, best practices, and standards
• Shared or coordinated resources
• Coordinated communications between related projects, including meetings, file storage locations, file formats, reporting requirements, etc.
• Common or coordinated sets of Project Management tools and artifacts
PMO MEETINGS

- Monthly Meetings with SGIP management
  - Bring PMO members and interested parties up to date on:
    - Status of each SGIP project (PAPs)
    - Areas where additional resources may need to be focused
      - Quad areas with YELLOW or RED status
      - Dealing with external organizations
    - Significant risks encountered, and proposed mitigation activities to prevent risks from becoming issues
    - Existing issues and proposed solutions

- Emergency meetings
  - As needed
  - Include SGIP and NIST personnel, Tech Champions, working group members and others
  - Address issues of immediate importance
  - Report back to interested parties
PMO MEETINGS (CONT’D)

• Tech Champion weekly meetings
  • Weekly meeting to assure consistent approach to making progress, and to address overall risks and issues

• PAP Projects consistency meetings
  • When changes need to be implemented throughout the program, meet with representatives from each SGIP project to assist them in making change.
  • Example: new web site status areas using “quad charts”
PMO Tools and Artifacts

- PMO and Project Charters
- Project Plans
- MS Project file / WBS / Project Schedule
- Process Flow Charts
- Quad Charts
- Written Procedures
- TWikis
- Mailings lists

- Project Scope Statement / Statement of Work
- Status Reports
- Document Management Plan
- Communications Plan
- Resource Management Plan
- Risk Register
- Issues log
- Action Item Lists
- Lessons Learned
PMO: Use of Tools and Artifacts

- Manage program and project scope
  - Prevent “scope creep”
- Assure common goals, objectives, and procedures among the various projects
- Balance resources, schedule, (budget)
- Track Progress: Timelines, Milestones and dependencies
- Bottom line:
  - Provide assistance to Tech Champions / Leads, etc., so they can get their work done on time on their projects
  - Keep management and members informed of progress and issues
PMO INTERACTION WITH PAPs

• PAP Creation
  • New PAPs are proposed by the Governing Board in conjunction with the SGIP plenary
  • PMO works with appointed personnel to make sure the activities are rolled out in a timely manner
  • Assures new PAP follows established procedures
  • Assists in overcoming startup problems
**PAP Creation**

**Process for Creating a New PAP**

**NIST Smart Grid Web Site**
- Create proposal for New PAP using Twiki Template in Website*

**New PAP Proposer**
- Believes there is a need for a New PAP

**SGIP Administrator**
- Review proposal for completeness and place on next GB meeting agenda. Forward proposal details to GB
  - GB reviews proposal and votes on New PAP request
  - New PAP Vote: Accepted or Rejected
    - Accepted: Create Charter
    - Rejected: Inform New PAP Proposer of decision

**Govern Board**
- New PAP Vote: Accepted or Rejected
  - Accepted: Create Charter
  - Rejected: Inform New PAP Proposer of decision

**New PAP WG Chair**
- Establish PAP WG
  - Proceed with work on New PAP

* Website: http://collaborate.nist.gov/twiki-sgrid/bin/view/SmartGrid/PriorityActionPlans
PMO INTERACTION WITH PAPs (CONT’D)

• Working Lifecycle
  • PAPs generally follow the established PAP Project Lifecycle
    • But not all PAP activities fit the generic model
  • Tech Champions address deviations from the standard lifecycle and inform the PMO
  • PMO assists PAP Tech Champions in dealing with risks and issues
  • PMO evaluates deviations for potential inclusion in standard lifecycle diagram, or as potential improvements to other PAPs
  • Check for interactions and interdependencies between PAPs
PMO INTERACTION WITH PAPs (CONT’D)

• Close out
  • When the PAP has completed its work
    • Or has completed all work except for remaining activities outside of its area of influence, such as after handing off to an SSO
  • PMO checks that all activities have been properly completed or closed out
    • Documentation has been properly captured and posted to public area (IKB)
  • PMO makes sure details have been taken care of, as personnel and SSOs roll off the PAP
  • PMO works with PAP leadership to identify and recognize key contributors
PAP CLOSEOUT

PAP Closeout Process

PAP Working Groups

- PAP work completed
  - Inform PMO and Governing Board
  - Make required changes
  - PAP W/G disbands

Governing Board

- Governing board is informed of each PAP's work completion
- Governing Board decides to close PAP W/G
- Work Complete
- Work Incomplete

PMO

- PMO assures that all artifacts are properly saved and published for future use
- Work complete?
- Work complete
- Work Incomplete

SGiP F2F
SUMMARY

• PMO exists to:
  • ACCELERATE Smart Grid standards development and harmonization activities
  • Report PAP/project status to SGIP
  • Create program-wide structure and processes
  • Assure smooth PAP/project lifecycles
  • Assist where possible and encourage acceleration of activities
  • Coordinate work between PAPs
  • Assure follow-through on all PAP/projects

• PMO does NOT:
  • Micromanage SGIP projects

• PMO is phased out when PAPs/Projects are complete
Q & A:

COMMENTS FROM PMO KICKOFF MEETING ON 03 MARCH 2010

• Add a SGIP-PMO-Public list serve for people to provide feedback and suggestions
  • Status: Under development
• Maintain a separate SGIP-PMO private team discussion list serve
  • Status: Complete
• Add a PMO page on the TWiki
  • Status: Complete
• Send summary PAP report for February to team and post to TWiki PMO page
  • Status: Complete
COMMENTS; Q & A