PROJECT MANAGEMENT FRAMEWORK WORKSHOP

Presentation to Committee of the Whole

May 25, 2017

What is a project?

Temporary endeavor undertaken to create a defined deliverable or result against which agreed to goals, objectives, requirements and specifications

- It has a definitive START and a definitive END and is time-constrained

- Projects are different unique

- Upon conclusion, the project deliverable(s) transitions into steady state operational support and is no longer considered a project

A *Project Management Framework* is a tool kit containing the processes, tools and templates to support consistent project communication and successful project delivery.

- – Vision
- – Guiding Principles
- – Strategic Outcomes
- – Policy Objectives
- – Governance Models
- – Process, Tool, Templates

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Vision and Guiding Principles

The City of Victoria manages projects in a consistent manner to ensure the most efficient approach is taken achieve strategic plan outcomes and ensure public dollars are used effectively.

- Plans are scaled for project management efficiency
- Clear governance and accountability
- Simplicity and consistency
- Common language is used
- Corporate memory is retained
- Risk management approaches are used
- Employee skill development is a priority
- Community and stakeholder involvement
- Continuous improvement
- Celebrate successes

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Framework Strategic Outcomes

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Framework Strategic Outcomes

Strategy and Execution Alignment

- Supports Council objective to "Innovate and Lead"

- Application to "new" projects in 2017 and beyond

- Provides a filter to ensure that projects are aligned with longer term outcomes

- Project funding is identified and sufficiently allocated

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Framework Strategic Outcomes

Governance and Methods

- Level of rigor, documentation and planning to be scaled to project risks and complexities (TBL)

- Corresponding governance structure established based on project category

- Linages to other corporate policies and frameworks
  - Capital Cost Estimate Policy
  - Purchasing Policy
  - Records Management Framework (under development)

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Framework Strategic Outcomes

Competency Development

- Assess and grow staff skills in 10 knowledge areas related to managing projects:
  - Integration
  - Scope
  - Time/Schedule
  - Costs
  - Quality
  - Human Resources
  - Communications
  - Risks
  - Stakeholders

- Establish a community of practice and on-going support for sustainment

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Framework Strategic Outcomes

Monitoring and Reporting

- Clear reporting mechanisms for each project through quarterly operational plan updates

- Provisions for on-going status reporting

- Projects include alignment to Civic Engagement Strategy

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Framework Strategic Outcomes

Project Management Framework provides direction to project managers and staff:

- Vision and guiding principles for project management

- Strategic outcomes and policy objectives

- Descriptions of project phases and considerations to take into account

- Project management processes and specific procedures for approvals

- Applicable tools and templates for the City of Victoria

Framework Policy Objectives

1. **Project briefs** will be completed prior to the commencement of a new capital and service/planning projects to ensure it is **aligned** with the most current Strategic Plan, Financial Plan and Operational Plan(s).

2. Clearly defined decision making authority and communications will form the basis for **project governance** from initiation through to project close.

3. A standard set of **tools and templates** for small, medium and large projects will be used.

4. Project plans will **be scaled according to complexity** to minimize **risk and liability** to the City.
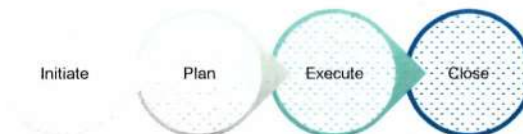
Framework Policy Objectives

5. Project budgets include **all costs** for the project, from initiation to close.

6. Estimates for **steady state operational costs** for sustainment.

7. **Monitoring and communication** at appropriate intervals and levels will be articulated at the on-set of projects to ensure common expectations.

8. Documented **project evaluations** will be undertaken to capture lessons learned and support **continuous improvement**.

9. **Employee competency development and skills training** will be available to support implementation of the project management framework.
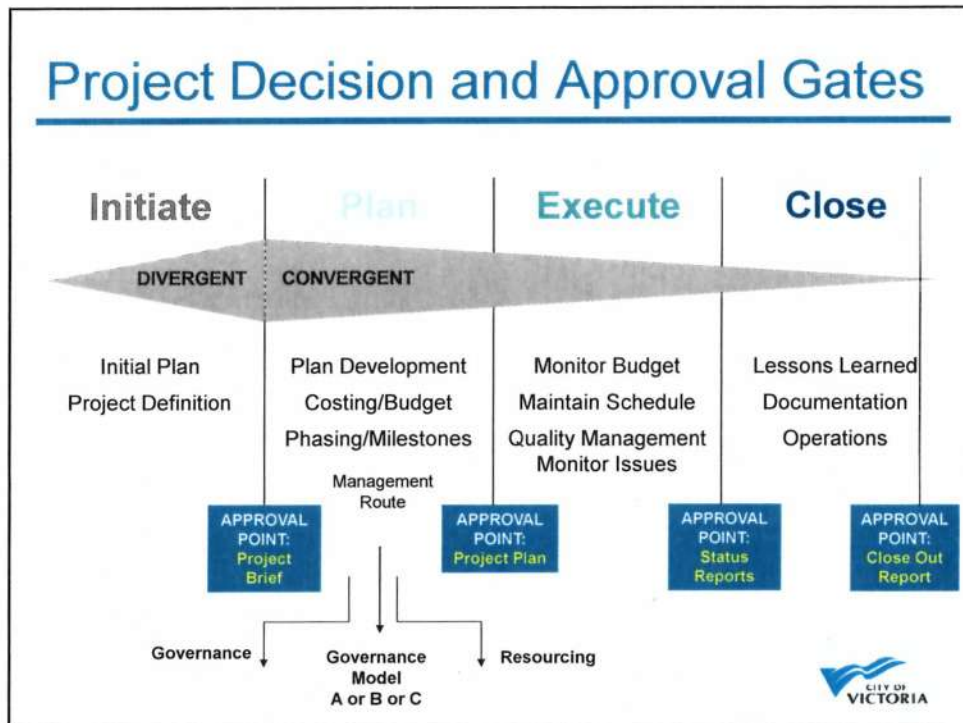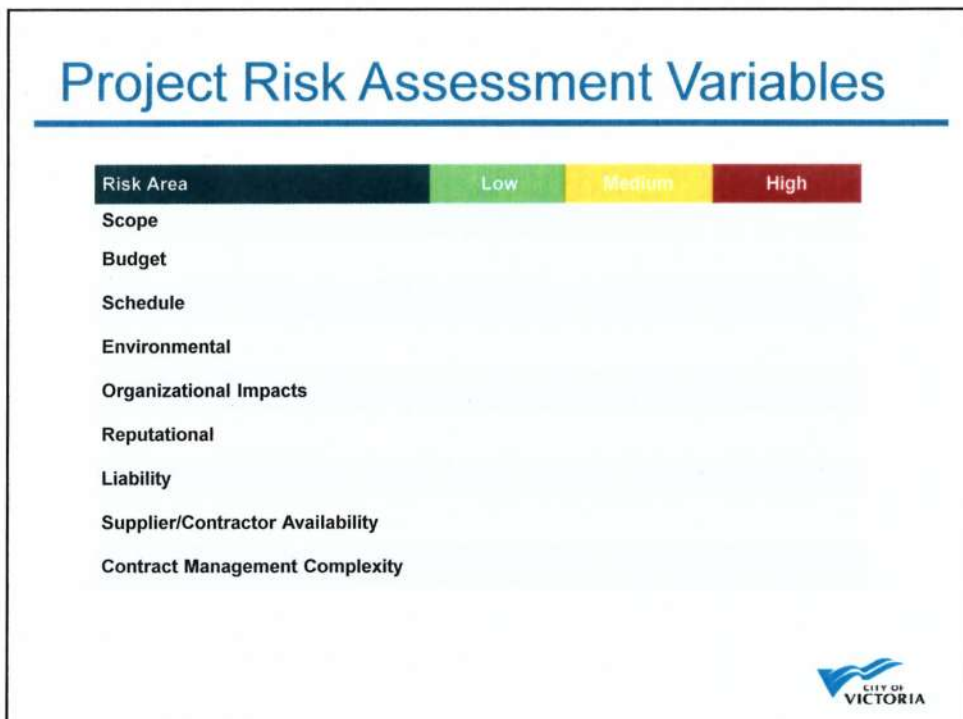
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Project Phases

- **Initiate**: The process where a need generates an idea for a piece of work that is discussed, refined and eventually goes through an approval process where it formally becomes a 'Project'.
- **Plan**: The process where the 'Project' requirements, specifications and management plans are developed.
- **Execute**: The process where the 'Project' requirements, specifications and management plans are executed, monitored and reported through status reports.
- **Close**: The process where the 'Project' deliverables are approved (i.e. meet project goals, requirements, specifications) and the 'Project' concludes. Includes approval of project close and lesson learned documentation.

Initiate   Plan   Execute   Close

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Project Decision and Approval Gates

Initiate	Plan	Execute	Close

DIVERGENT | CONVERGENT

Initiate	Plan	Execute	Close
Initial Plan	Plan Development	Monitor Budget	Lessons Learned
Project Definition	Costing/Budget	Maintain Schedule	Documentation
	Phasing/Milestones	Quality Management	Operations
		Monitor Issues	

Management Route

APPROVAL POINT: Project Brief

APPROVAL POINT: Project Plan

APPROVAL POINT: Status Reports

APPROVAL POINT: Close Out Report

Governance → Governance Model A or B or C → Resourcing

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Project Risk Assessment Variables

| Risk Area	Low	Medium	High
Scope			
Budget			
Schedule			
Environmental			
Organizational Impacts			
Reputational			
Liability			
Supplier/Contractor Availability			
Contract Management Complexity			

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Project Governance "Requirements"

- All projects have a formally agreed **governance** structure
- Clear and unambiguous allocation of **authority for decision making**
- Single point of **contact/accountability**
- **Roles and responsibilities** of all team members is clearly defined
- Clearly defined **degree of control** for each project owner
- There is a mechanism in place to provide **independent review**
- **Separation** of stakeholder management and project management activities
- **Separation** [differences in] project and organizational governance structures
- **Plans are approved** at the appropriate level
- There is a **process in place for decisions** and disputes
- **Professional competencies** are adequate and in place

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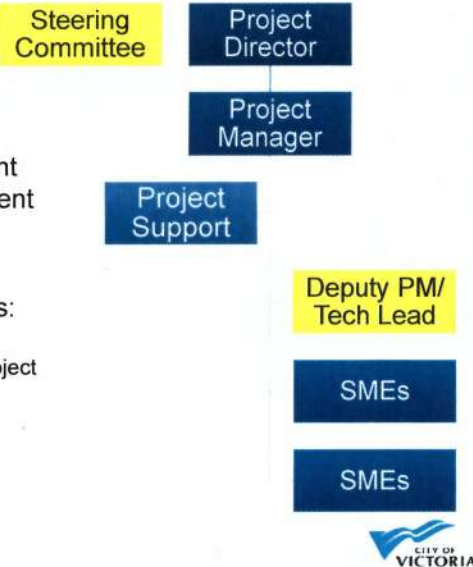# Project Structure: Low Risk

- All projects will have these roles defined

- Governance structure is relatively lean:
  - Some director involvement to provide guidance
  - Council input and direction generally not required
  - Limited number of subject matter experts required on the team

Project Director (or Designate)

Project Manager

Project Support

SMEs

SMEs

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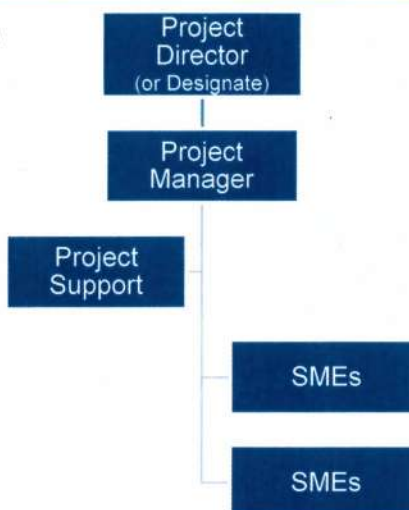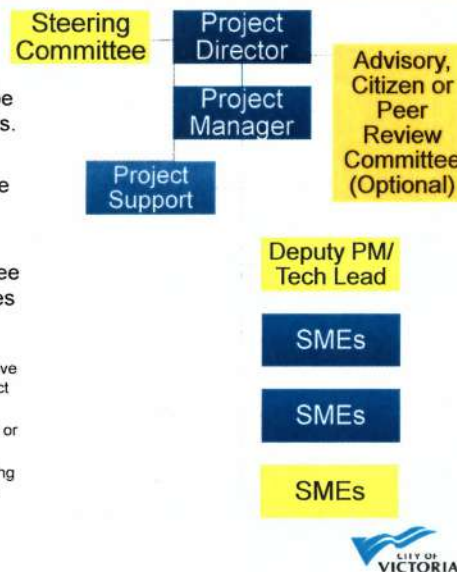
Project Structure: Medium Risk

- Interdisciplinary projects generally require a steering committee

- Additional project management support through the appointment of a 'deputy' (optional)

- Governance structure requires:
  - Decision making process for the steering committee to ensure project deliverables and outcomes are achieved
  - Council check-in for input and direction likely

Steering Committee — **Project Director** — **Project Manager** — **Project Support** — **Deputy PM/ Tech Lead** — **SMEs** — **SMEs**

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Project Structure: High Risk

Governance structure similar to Yellow Route, except:
- Additional subject matter expert may be required resulting in 'sub' project teams.

- Council likely takes plays a more active role in providing direction

- Consideration of an 'external' committee to support the project specific outcomes forms may include:
  - Advisory – stakeholders from surrounding municipalities, governments and agencies that have an interest or knowledge or expertise of the project
  - Peer – subject matter experts from other jurisdictions or sectors that can provide additional or new insights
  - Citizen – diverse group of representatives providing a range of views from their personal perspectives (youth, senior, business, environment, heritage preservation, etc.)

Steering Committee — **Project Director** — **Project Manager** — **Project Support** — **Advisory, Citizen or Peer Review Committee (Optional)** — **Deputy PM/ Tech Lead** — **SMEs** — **SMEs** — **SMEs**

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Advancing the Framework in 2017

- Automation of templates to a project on-line environment

- Continued training and roll-out to staff

- Expand the application of the framework to the 2018 Operational Plan (Key Initiatives)

- Develop enhanced performance measures and increased project tracking

- Select projects to be subjects of internal audit to identify further improvements

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