

University of Maryland

Project Management Symposium

NEXT SESSION

Sustainable PMO and Agile Transformations – Case Study Federal Public Health Agency

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PROJECT MANAGEMENT
CENTER FOR EXCELLENCE

A.J. CLARK SCHOOL OF ENGINEERING
Civil & Environmental Engineering Department

This session will be recorded.

Project Management Symposium

PMO and Agile Transformation

Public Health Agency

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Background

PMO and Agile Transformation –
Public Health Agency



Background

- Difficult challenges require significant changes to be **transformational**.
- Changes **need to stick** and not divert back to old ways of working.
- Agile Transformation at a large Federal Public Health agency.
 - Traditional Project Management Office (PMO) portfolio of projects.
 - Enhance **ability to respond** to changing requirements and user needs.
 - The focus moved to **outcomes**, not outputs or milestone deliverables.
 - Demonstrate how the agency has continued to not only maintain





Legacy PMO

Agency Project Management Office



Need for Project Management Office

- Long history and several tools.
- In development for many years.
- Limited structure beyond the software development teams.
- Organized into projects and development teams
- Lacked structured governance and standards for project management.
- Implemented a Project Management Office (PMO).



PMO Governance and Standardization

Budget	Schedule	Status	Staffing	Risk
<ul style="list-style-type: none"> • Costs (dollars) for the YTD actual, YTD plan, year end forecast. • Planning budget by program. • Majority of budge. associated with labor. • Dollars based on the billable hours in the fiscal year. 	<ul style="list-style-type: none"> • Monthly updates. • % Complete. • Updated dates. • Re-baseline not permitted unless PMO authorized. • Data for report - board meetings. • MS Project for additional information. 	<ul style="list-style-type: none"> • Monthly status updates. • Notable events. • Upcoming activities. • General comments and updates for leadership visibility. 	<ul style="list-style-type: none"> • New hires, departures, changes in utilization %, assignments to other projects, etc. • Data used by PMO to calculate project forecasts - impact your monthly budget variances. 	<ul style="list-style-type: none"> • Risk and Opportunities updated on monthly basis. • Impact, probability, mitigations, etc. reviewed during program reviews.





Continued Need for Improvement

- More controlled environment.
- Many challenges remained.
- Move to a more Agile approach.
 - Shift from traditional project management to a product-based approach.
 - Required training, coaching, mentoring to product-based mindset.
 - Applied agile and lean practices for strategic planning, budgeting, team building, and iterative-incremental product delivery.
 - Shift from project to product required corresponding shift in the mandate and responsibilities of a traditional PMO.





Transition

Agile Transition Initiative



Adopt Agile Framework

Launched **Agile Transition Initiative** in 2021

- Large Enterprise-Wide Initiative.
- Fulfill the mission and meet or exceed customer expectations.
- The vision, strategy and structure aligned to a portfolio of products.
- Enable iterative delivery by creating cross functional product teams.
- Empowered to make decisions.

Goals

- Products are appropriately aligned with organizational vision and goals.
- Product roles and responsibilities have been defined, communicated and adopted.
- Training and support (coaching) has been provided.





Agile Transition Initiative

Key Tactics and Outcomes

- Start with customer needs, align with that
- Decisions and priorities based on data
- Demonstrate iterative improvements in customer experience
- Freedom to reallocate resources within products to highest priorities
- Less non-productive reporting overhead





Transformation Before and After

Before

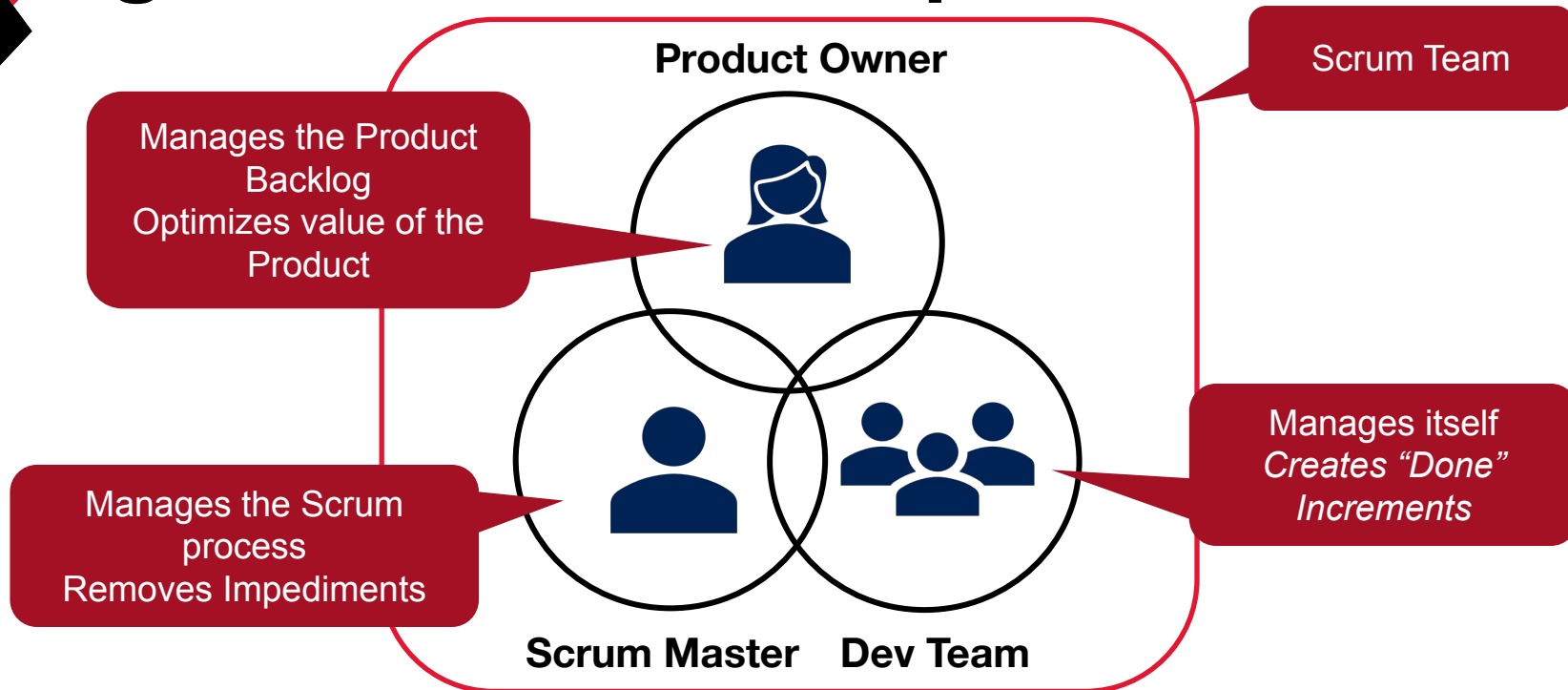
- Staff split between multiple projects, multiple goals
- Constant priority discussions
- Staff shifted among projects as needed
- Specialized staff members are a single point of failure

After

- Product Backlog management with single Product Owner and dedicated team
- Product Owner accountable to stakeholders
- Move the work to the Product Teams, not the people to the project
- Cross-product work is allocated to the appropriate Product Team



Agile Roles and Responsibilities





Results

- Agile Flexibility
- Customer-Centric Focus
- Predictable Releases
- Strengthened Collaboration
- Heightened Employee Engagement





ACOE

Agile Center Of Excellence



Adopt Agile Best Practices

- Introduction of the **Agile Center of Excellence**.
- Connect work at the development level and continue to improve.
- Framework that supports the longer-term strategy.
- Improve visibility and continually adapt to changing priorities.
- Defines agile practices used at agency.





A decorative graphic consisting of three overlapping arrows pointing to the right, colored red, yellow, and black.

Agile COE Strategic Goals

- Programs and products can prioritize work - working on the **right things** within existing constraints.
- Product teams are **staffed appropriately**.
- Clear reporting process driving decision making to bring the **best value to customers**.
- Robust agile support and growth program so that agency can **deliver value** across teams.



Agile Center of Excellence - Purpose

 From	 To
People need to be directed and managed, otherwise they won't know what to do—and they'll just look out for themselves. There will be chaos	When given clear responsibility and authority, people will be highly engaged, will take care of each other, will figure out ingenious solutions, and will deliver exceptional results
An agile organization comprises a dense network of empowered teams that operate with high standards of alignment, accountability, expertise, transparency, and collaboration Must also have an ecosystem ensure that these teams are able to operate effectively	
The purpose of the ACOE is to provide the Agile framework to drive continuous improvement to maximize efficiencies and deliver exceptional outcomes	





- Product-Focused Agile framework
- The overall "Agile" enterprise
- Leadership
- Portfolio Management
- Product Teams
- (A)PMO
- SW Development
- Product Management
- Coaching, Training, Mentoring
- Continuous Improvement
- Continuous Learning

Team	Tasks/Area of Responsibility
<p data-bbox="587 456 954 489">Agile Steering Committee</p> 	<ul style="list-style-type: none"> • Product-focused Agile leadership team • Enterprise architecture team • Strategic direction • Develops Vision and Goals Canvas • Develops Strategic Roadmap and Release Plan • Prioritizes Delivery Team Epics that will deliver highest value • Assist with removing blockers and escalations • Provides direction to Communities Of Practice (COP) • Governance & oversight of Initiatives, Epics and Stories
<p data-bbox="587 731 869 801">Agile Community of Practice</p> 	<ul style="list-style-type: none"> • Team of Agile practitioners • Works under direction of Agile Steering Committee • Cross-Initiative-Program-Product representation • Coaching and Mentoring • Identifying and Sharing Techniques and Best Practices • Assessments and recommendations • Specific Agile Coach requests • Scrum Masters for Epics and Stories



Benefits of an Agile Center of Excellence?

Agile COE provides the following:



Mechanism to gather thought leadership



Mechanism to share innovations and ideas



Strategic Alignment



Purposeful Best Practices





APMO

Agile Project Management Office



APMO Organization

- Reorientation from the **traditional PMO** to an **Agile PMO (APMO)**.
 - Manages execution of work via project management and agile expertise.
 - Supports cost and budget management.
 - Coordinates and facilitates all program reviews.
 - Implements Communities of Practice.
 - Institutionalize healthy Agile best practices.
 - Utilize best-fit Agile framework.





APMO Agile Goals

- Respond to customer requirements/user needs.
- Align strategic plans to portfolio of products.
- Enable iterative delivery.
- Develop a product-based mindset.
- Apply agile and lean practices for strategic planning, budgeting, team building, and iterative-incremental product delivery.



APMO Organization



APMO Operations

APMO Organization **Group**

- Overall support for members of APMO Group
- APMO Guidance and Peer Collaboration
- Portfolio Management
- APMO Governance



Project Managers

Project Manager **Individuals**

- Hard Skills
- Soft Skills
- Support Quarterly Reviews
- APMO Artifact Updates
- Budget and Resources



Scrum Masters

Scrum Master **Individuals**

- Sets up the Scrum structure for the team
- Facilitate the creation of Working Agreements
- Removes obstacles in the work process flow





Collaborative Effort



Close collaboration from Agile COE, Product Management and PMO



Product Management	Project Management Office
<ul style="list-style-type: none">• Chartering/Framing Sessions• Vision and Goals canvas• Strategic Roadmap• Release Plans• Goals, Outcomes and Metrics• Working on the “Right” things	<ul style="list-style-type: none">• PMO Metrics• Resources and Staffing• Budget• Milestones• Coordinating Reviews• Monthly Budget/Milestone• Quarterly Program Reviews• PMO Team• Scrum Masters• Project Managers



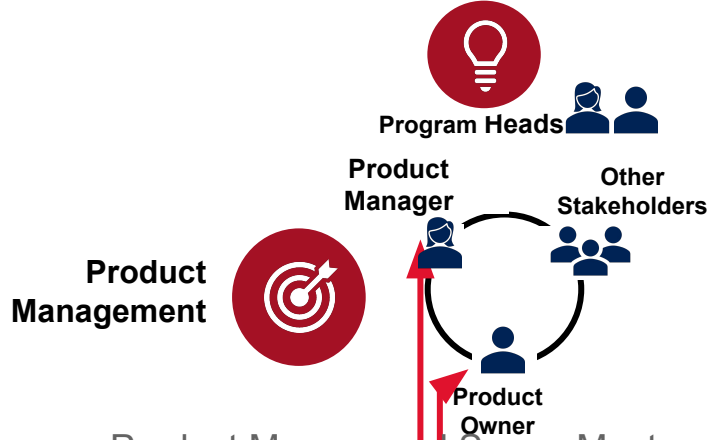
Finding the Right Balance



- Manage Triple Constraint: Budget/Schedule/Scope
- Defined Processes and Procedures
- Plan
- Monitor
- Control

- Individuals and interactions over processes and tools
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan

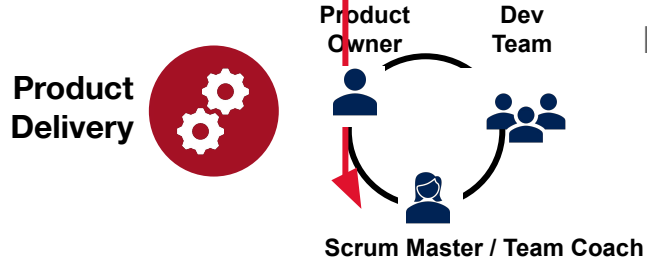




Product Management Tools and Techniques

- Facilitated Workshop
- Vision/Goals Canvas
- Strategic Roadmap
- Release Plan

Product Manager and Scrum Master share many responsibilities working with PO



Product Delivery Tools and Techniques

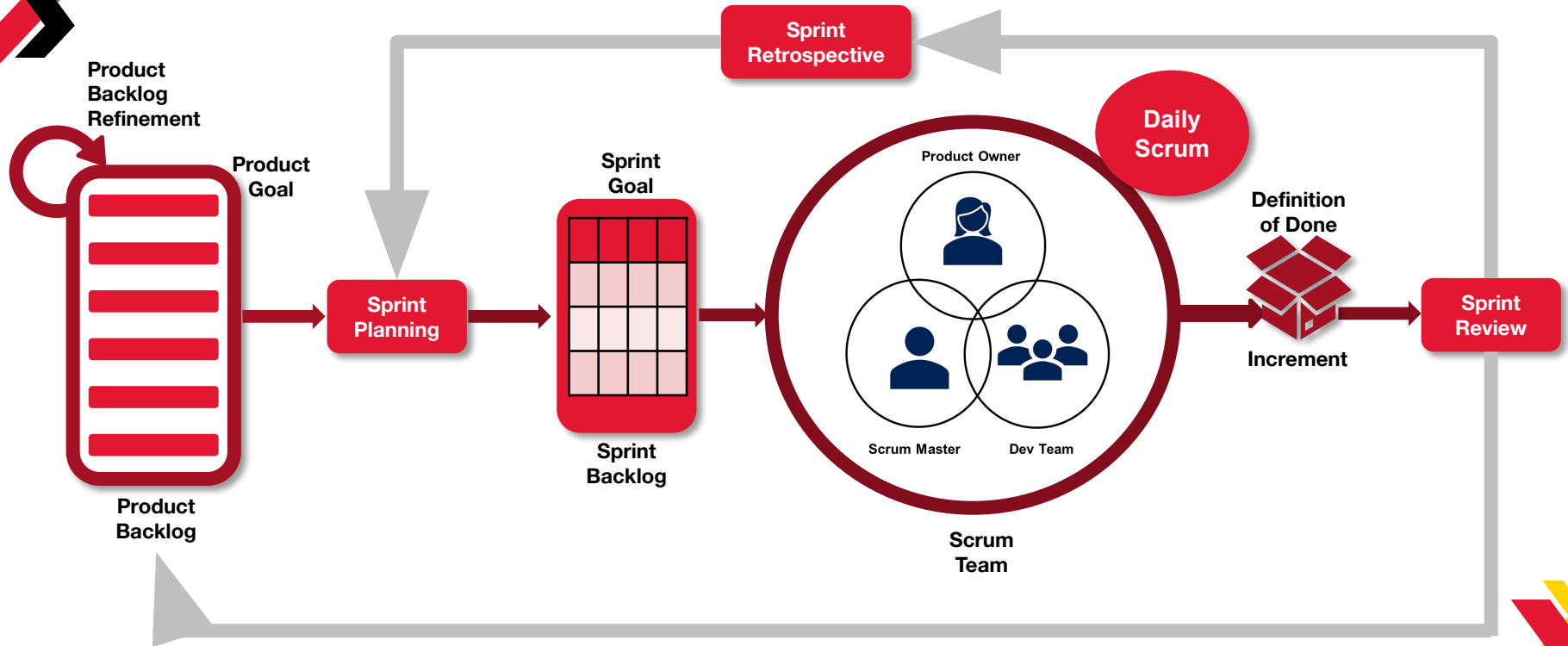
- Product Backlog
- Sprints

Incremental Release

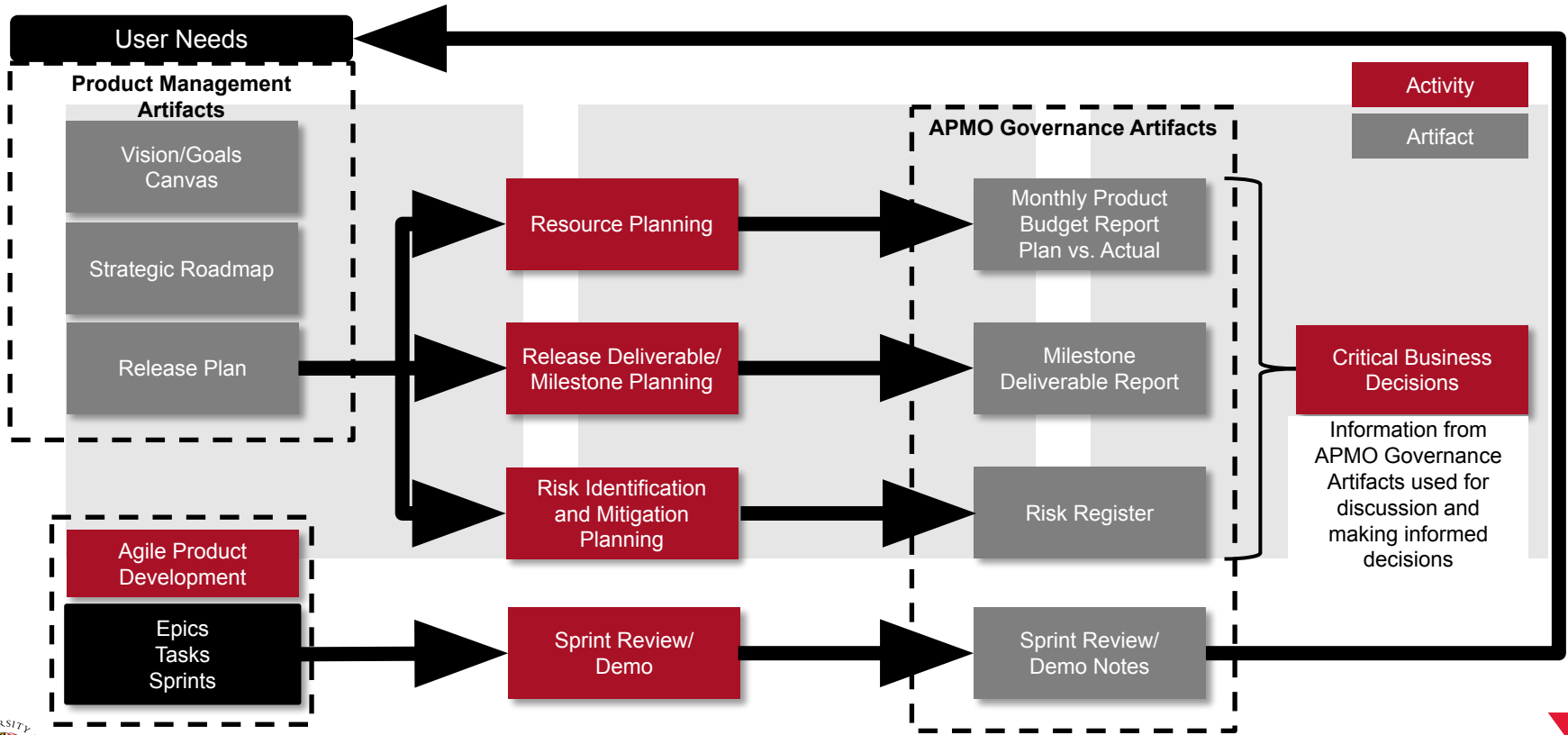


Example Only: Not overly prescriptive of process or roles & responsibilities

Product Delivery – Scrum Framework



Agile PMO Governance Framework





Templates/Reports vs. Managing Work

Teams working every day and actively managing the priorities and changes or adjustments based on new information



Teams regularly (frequently) review Roadmaps, Release Plans, etc. and re-direct as needed

Based on defined cadence (Monthly, Quarterly, Other) the teams report out on progress as of that date

As much as possible, this report out should come from existing artifacts that are updated during everyday activities



The review is not about filling the template correctly, it is about focusing discussions on key items



Reports are an opportunity to provide transparency to leadership for on-going activities





Results

- PMO Best Practices balanced with Lean and Agile
- Flexibility and ability to tailor as needed
- Consistency where needed for transparency
- Lightweight reporting requirements
- Budget guardrails allow quick decisions
- Iterative delivery and MVP vs. requirements defined up front with change management bureaucracy





Questions?

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Evaluate Session

