

Exercise 6: PPFMO Plan

This chapter's exercises require paperwork. If you're groaning at that thought, remember that soon you will be demanding that each one of the program, project and operations managers must come up with much more documentation every year. If you don't like it, think how they feel.

The exercises provide very high-level outlines. **You can obtain samples and templates in native format from the [book's website](#)¹.**

These outlines include all of the necessary elements from the Program Management Standard (PMI). Most of them probably apply in some way to the PPFMO initiative (and to any other initiative requiring executive backing and funding).

1. Develop a charter for the PPFMO. Answers are required for each topic, but the answer should be tailored to the size and complexity of the PMO's responsibilities. Even if the topic is relevant, the Charter does not require a long-winded answer.
 - a. Justification (business case)
 - b. Vision: end state
 - c. Strategic Fit
 - d. Intended Outcomes
 - e. Scope
 - f. Benefits Strategy
 - g. Assumptions and constraints
 - h. Program components
 - i. Risks and Issues
 - j. Timelines or Roadmap
 - k. Resources (people, money)

¹ www.simmer-system.com

2. Develop an operating procedure for the governance board.
 - a. Summary of Goals:
 - i. Recap the goals of the organizational segment over which the governance board has jurisdiction.
 - ii. Success Criteria
 - iii. Quality standards
 - b. Structure and composition of the Governance Board
 - c. Roles and Responsibilities of Stakeholders (including PPFMO)
 - d. Current Program Structure, scope, timing and performance measures
 - e. Program Decisions
 - i. Managing Existing Programs:
 1. Annual review of programs: current year; progress and performance records; requirements for future years
 2. Budget allocations
 3. Ratification of planned scope and performance criteria
 4. Oversight of ongoing programs (see following sections)
 - ii. Establishing new programs: how scope and performance criteria are determined
 - iii. Closing programs
 - f. Program Oversight Activities
 - i. Performance Management (assignment and tracking of metrics)
 - ii. Planned Governance Meetings
 - iii. Program Methodologies and Life-Cycle Models
 1. Event-Based Approaches: Phase Gate Definitions and Review Processes
 2. Time-Based Approaches: Periodic Health Checks

- iv. Dependency Management
 - v. Program Reporting and Control
 - vi. Issues Escalation
 - vii. Change Management
- g. Meeting Structure