

**Structure and Function of the  
EBS NA Business Unit Project Management Office**

**TITLE:** **EBS NA Project Management Office (PMO):  
Purpose and Function**

**SUMMARY:** This document provides standard guidance on the purpose and function of the EBS NA Project Management Office.

**STATUS:** **Generic – for tailoring by Business Units**

**DISTRIBUTION:** This document is held within the EBS NA OurNet PMO section. The latest "Approved" version of this manual will be available electronically in Word to all EBS NA project staff. Apart from the master copy, all other paper copies of this document are uncontrolled unless distributed via a locally controlled route.

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EBS NA Business Unit Project Management Office**

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## **Purpose of the Project Management Office (PMO)**

- Administration of the monthly reporting process for EBS NA Business Unit projects
- Administration of and participation in the review process for EBS NA Business Unit projects
- Provide guidance to project managers on conformance to EBS NA Business Unit processes and procedures relating to projects
- Control issue of standard toolsets to project managers
- Provide Project Management Office service to individual projects where required
- Maintain central library of project documentation for all projects
- Maintain and administer the time recording process for project staff
- Co-ordinate implementation of ICL and EBS NA Business Unit programs across projects
- Act as a focal point for communication between HQ Project Management Office and projects
- Administration of and participation in a program of project audits
- Provide advice, guidance and assistance as required by projects
- Maintain the Project Management Office procedures manual
- Involvement in bid review processes as required
- Escalate problems on behalf of project managers

# **Structure and Function of the EBS NA Business Unit Project Management Office**

## **Notes on the workings of the Project Management Office (PMO)**

### ***Administration of the Monthly Project Reporting process for EBS NA Business Unit projects***

The project review process is as defined in the Business Evaluation Process (BEP). The Project Management Office is responsible for all delivery reviews (i.e. from Project Initiation Meeting PIM onwards).

Administration of the monthly reporting process includes the following activities:

- Reminding PMs about deadlines for project reports
- Chasing any reports not submitted within timescales
- Maintaining a log of when reports received and any problems
- Checking reports for completeness and compliance against standards. Rectifying any faults with the PM
- Storing and distributing reports
- Ensuring that all project reports are correctly logged on the HQ projects website
- Production and distribution of the monthly RAG summary report

The PM is responsible for producing both the Monthly Project Report (MPR) and the agreed Financial Status Report (FSR) each month, and is responsible for arranging time with the project controller to agree the figures in the FSR. Note that the PM (not the financial controller) is to 'own' the project FSR and is responsible for ensuring that it is correct.

### ***Administration of and participation in the Project Review process for EBS NA Business Unit projects***

Administration of the monthly review process includes the following activities:

- Production, maintenance and distribution of a schedule for full project reviews
- Booking rooms for full and ad-hoc project reviews of all types
- Reminding attendees of dates for project reviews, and checking attendance at same
- Taking and distributing meeting action notes from project reviews
- Monitoring progress on actions from project reviews
- Participation in reviews on those projects not subject to the full project review process
- Organisation and administration of Project Initiation Meetings, PTRs and any ad-hoc reviews that may be required.

### ***Project Initiation Meetings PIMs***

All projects will go through a PIM, which authorises the project to proceed and agrees the project baseline budget, timescale and reporting tolerances. The PIM should be held immediately the project contract has been signed. The Commercial Unit will give notification of this event.

### ***Progress reviews***

Full progress reviews will normally be held monthly for projects satisfying the criteria for a full review. The schedule, agenda and attendance list for these reviews are identified in (REFER TO THE ISSUED SCHEDULE). All reviews will be carried out with the PM in person – there will be no reviews via telephone links. The location of the PM and other review attendees will be taken into account when setting the location for the review.

The review process will itself be reviewed quarterly.

## **Structure and Function of the EBS NA Business Unit Project Management Office**

### ***Provide guidance to project managers on conformance to EBS NA Business Unit processes and procedures relating to projects***

Project managers starting a new bid or project will not be assumed to be familiar with the current standards to be used on EBS NA Business Unit projects.

The Project Management Office will set up and maintain a 'Welcome Pack' for distribution to project managers when they become involved in EBS NA Business Unit projects. This will contain, amongst other things, a definition of the standard toolsets to be used, a description of the reporting and review process and the report templates. This should be issued to project managers once they are allocated to a project and it has gone through the Contract Approval Review CAR. The commercial and finance contacts for the project will be confirmed to the PM at the same time.

### ***Controlled issue of standard toolsets to project managers***

The following items need to be rolled out to projects as appropriate.

- Standard project management toolsets (currently defined at corporate level) along with any subsequent updates.
- Templates for the monthly reports

### ***Provide Project Control Officer to individual projects***

EBS NA Business Unit projects will require a Project Control Officer to provide a comprehensive project planning, administrative and control service to facilitate project activities and to help the Project Manager to keep control of the project. Additional responsibilities include the management of project resources, economics, and project reporting activities. The PCO will maintain the project library which houses all project related documentation. They also save the PM the following:

- The amount of time that the PM can spend controlling the project, managing customer situations and generally liaising with the customer is reduced;
- The customer may feel the need to take on some of the administrative responsibility for the project, reducing the perceived value of ICL's project management involvement and reducing our control of the project;
- Project administration may not always be done thoroughly. In particular, the monitoring of project spend may not always be as good as it should be.

The Project Management Office provides a service to assist the project managers in some of the administrative tasks associated with running a project. This should have the effect of:

- Enabling the PMs to provide a better service to their customers;
- Enabling the PMs to focus more on managing projects, thus reducing risk of potential problems being overlooked;
- Providing a better control on project expenditure, particularly relating to manpower costs;
- Provide better 'value for money' – the Project Management Office staff can be costed in at a lower rate than the PM would be for the same work.

Bids should include a calculated allowance for Project Office effort. This would be offset against some of the PM time normally allowed for project administration, but at a lower cost.

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**Activities**

Activities will vary according to level:

<i>Activity</i>	<i>Description and key performance indicators</i>
Supporting Project Manager	Supports project. Escalates problems appropriately. At senior level, manages Project Control Office. All parties satisfied with project administration
Providing project planning service	Provides project planning service to project, in line with recommended tool sets. Ensures project plans conform to Divisional planning guidelines. Co-ordinates input and maintains plans throughout project life cycle. Uses appropriate configuration management process to control changes to contract baseline and project configuration items. Keeps abreast of all changes to projects and informs stakeholders appropriately of relevant information and changes
Delivering quality	Implements quality management system that conforms to ISO standards across all projects. Produces agreed deliverables on time and to appropriate quality standard
Maintaining project documentation	Maintains library and registry of all contractual, baseline and project documentation. Takes appropriate security measures for documents and equipment. Provides job descriptions and work statements for all project staff. Maintains project documentation to high standard
Maintaining financial records	Maintains financial records of all projects. Provides senior management with up-to-date financial position on all projects
Reporting	Meets Divisional project reporting requirements
Building relationships	Works with Purchasing to prepare contracts, raise purchase orders and agree delivery dates with suppliers and subcontractors. Notifies people of impact of changes to delivery dates in most appropriate way
Managing risks and issues	Defines and manages process for reporting and resolving issues. Manages project risk registers and risk plans and progresses all risk actions
Developing personal skills	Enhances reputation of both ICL and self through personal style and development of new skills

## **Structure and Function of the EBS NA Business Unit Project Management Office**

### ***Maintain central library of project documentation for all projects***

This needs to include the following documents as a bare minimum:

- all formal project documents (including Project Initiation Documents PIDs, plans, monthly reports and meeting action notes from reviews);
- originals of signed-off project documents;
- copies of all communications between the customer and ICL;
- copies of all communications between third party suppliers and ICL.

Documents will only be held as printed copies if there is no electronic copy available or if they contain a signature without which they would have no force. All electronic copies are to be held in a central library on a server with Intranet access. Any documents that are only available as printed copies are to be held at (SPECIFY LOCATION) with a cross-reference on the electronic library.

The Project Management Office will determine which library is to be a back-up repository and which forms the 'live' project library.

Once a project is closed down, the project library must be passed to the Project Management Office for safe storage.

### ***Maintain and administer the time recording process for project staff***

The requirement is for a system that will accurately record time spent by any directly-chargeable labour resources on project work. This will include ICL resources bought in on a T&M basis, but excludes fixed-price services purchased from other units. The system needs to provide management information to identify resource utilisation and resource availability and whether projects are being correctly charged for resources used.

(SPECIFY THE SYSTEM OR SYSTEMS TO BE USED, AND REFER OUT TO THE RELEVANT PROCEDURES FOR TIME RECORDING)

### ***Co-ordinate implementation of ICL and EBS NA Business Unit programs across projects***

This covers programs such as Propel or the Project Delivery Campaign. Each program needs to be reviewed as it becomes active. The Project Management Office provides overall coordination of these programs and their interaction with EBS NA Business Unit projects

### ***Act as a focal point for communication between Group Projects & Programs Office and EBS NA Business Unit projects***

The Project Management Office is the official channel for project reports, reviews and discussions on processes, toolsets, etc.

## **Structure and Function of the EBS NA Business Unit Project Management Office**

### ***Administration of and participation in a program of project audits***

The Project Management Office is responsible for the following:

- Maintaining the Audit Procedure document
- Setting the project audit schedule;
- Making arrangements for individual audits;
- Assisting in carrying out audits both as auditors and auditees (in the case of projects where the Project Management Office provide a PCO function);
- Storage, distribution and follow-up of audit reports.

Projects may be nominated for an audit as an outcome from a project review.

Audits should also include checks on any third parties involved in projects.

### ***Provide advice, guidance and assistance as required by projects***

This covers advice, guidance and assistance to EBS NA Business Unit project staff over and above any project administration tasks.

### ***Maintain the Project Management Office procedures manual***

The Project Management Office is responsible for ensuring that procedures existing to cover Project Management Office functions conform to the ISO 9001 standard, and are maintained up-to-date.

The Project Management Office is also responsible for maintaining the Project Management Procedure in the EBS NA Business Unit Operations Manual.

### ***Escalate problems on behalf of project managers***

If problems requiring escalation within ICL occur on a project, these should be notified to the Project Management Office, which will escalate the issue as appropriate and will monitor the resolution actions.

### ***General Information***

The central contact point for the Project Management Office is David J. Lanners, 972-716-8738 [dlanners@fjicl.com](mailto:dlanners@fjicl.com)

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