






Project Management Office Organizational Charter Roles, Responsibilities, Authorities and Accountabilities

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Role

The LBNL Project Management Office (PMO) prime role is to establish and maintain a Laboratory-wide project governance framework and to foster an environment and culture that assists and assures the management of LBNL projects to the highest level of performance. The responsibilities, authorities, and accountabilities described below are applicable to what the PMO defines as “mission critical projects.”¹

Responsibilities

1. Maintain the Portfolio of active LBNL mission critical projects so that these projects are tracked for success and status is provided to senior management. That Portfolio includes:
 - a. Projects that are under the purview of the PMAB
 - b. The evaluation of those projects for status, including performance and risks
Note that PMAB consists of two committees: PMAB-SE with a focus on science/engineering; PMAB-CP with a focus on construction projects.
2. Provide assistance and guidance to projects or programs, as appropriate, and identified by senior management or the LPMO.
3. Define a Framework for project planning, management, execution and control that:
 - a. Identifies all needed elements of Project Management at LBNL
 - b. Allows for tailoring and grading based on the nature of the project
 - c. Is fully coordinated with PIMD framework for Construction Projects
4. Identify, establish, and ensure the utilization of appropriate Project Management methodologies, tools, processes and templates, associated with all phases of the project.
5. Assure that the Roles and Responsibilities for Project Management in all organizations involved in a project lifecycle are clearly defined and accepted.
6. Implement independent oversight mechanisms that are utilized and insightful:
 - a. Employ oversight mechanisms to aid in the evaluation of project performance and identification of project risks at multiple levels and focus on early warning signs
 - b. Create and execute processes for the conduct and follow-up of project reviews including Director’s Reviews, Phase Gate Reviews, and other external reviews, assessments, and vettings. The level and detail of such follow-ups will be determined by PIMD management for Construction projects and by the PD for S/E projects.
 - c. Establish Project Management Advisory Boards (PMAB) representing a range of internal/external expertise, to monitor, advise and report on the breadth of the LBNL

¹ PMO’s definition of “mission critical projects” are projects that meet at least one of the following criteria:

- Falls under requirements of DOE Order 413.3
- Total cost exceeds \$50M
- Deemed of strategic importance to/by Laboratory Director, or Deputy Directors to either the Laboratory, University of California, or Agency based on:
 - Multiple funding source complexity
 - Multiple collaborating institution complexity
 - Project portfolios critical to Laboratory mission support
 - Recommendation of an ALD or Division Director

project management including project and portfolio performance, cross-cutting internal/external issues.

7. Develop and maintain criteria and resource materials to improve and assess the competency of project management staff in applicable methodologies and tools:
 - a. Identify knowledge criteria
 - b. Organize the needed training portfolio, leveraging training from PIMD, other public and private institutions. This includes:
 - i. Training curricula
 - ii. Training tracking mechanisms
 - iii. Communities of Practice
 - iv. Ensuring appropriate project team members are up to date on all relevant Earned Value Management System (EVMS) training to retain LBNL EVMS Certification
 - c. Upon request, assist and assess the needed quantity and quality of LBNL project management staff based on forecasts for the future LBNL Project Portfolio.

8. Foster a positive, inclusive, continuously improving, project management culture:
 - a. Provide communications to senior and line management, project managers and other project teams members, that support lab-wide alignment with the LBNL Stewardship Statement regarding Project Management
 - b. Frequently articulate and otherwise promote the LBNL Project Management principle that LBNL Projects will accomplish their defined scope on schedule and within budget, while being conducted in a manner that ensures proper quality, personnel safety, site security, and environmental stewardship
 - c. Foster a partnership and culture where the PMO forwards the project management environment but the prime responsibility for each individual project's performance is a line management responsibility
 - d. Promote a positive, inclusive, and continuously improving PM environment and culture throughout LBNL
 - e. Motivate the LBNL Project Management Community of Practice to share knowledge and best practices and to promote a LBNL wide commitment to success of all its projects, with particular attention to the Project Portfolio.

Authorities

The overarching PMO authority is to provide assistance and assurance that Portfolio Projects are being managed to the highest standard. Given that the prime responsibility for the conduct and success of projects belongs to the project managers and their line management, the PMO authority is exercised by full, timely and escalating communications with project managers, line managers, and senior LBNL management.

Detailed PMO authorities are codified below and are aligned with the responsibilities articulated in the previous section. Note that some PMO authorities cross-cut multiple responsibilities but are only mentioned once below.

1. In order to create and maintain a Portfolio of active LBNL mission critical projects, the PMO has authority to recommend criteria for inclusion in the Portfolio (see footnote 1), including
 - a. criticality to LBNL mission

- b. size and scope
 - c. level of funding
 - d. complexity
 - e. risk
 - f. personnel safety, site security, environmental stewardship
 - g. external exposure
 - h. requirements of funding source
2. In order to ensure that LBNL projects are tracked for success, the PMO has the authority to independently provide and escalate timely periodic and ad-hoc communications of the status of the Portfolio and its individual projects to line and senior management. This will include any cross-cutting issues that may directly or indirectly affect current or future LBNL projects.
3. In order to ensure the development of the Project Management Framework the PMO has the authority to:
- a. Determine the needed elements of the Framework including its associated methodologies, tools, training and oversight*
 - b. Establish criteria containing mandatory elements of the Framework as well as allowable tailoring and grading, including*
 - i. criticality to LBNL mission
 - ii. size of scope
 - iii. level of funding
 - iv. complexity
 - v. risk
 - vi. personnel safety, site security, environmental stewardship
 - vii. external exposure
 - viii. requirements of funding source
 - c. Maintain certification for EVMS.
- *In regard to Construction Projects, the PMO has the authority to recommend such elements to PIMD
4. In order to ensure the utilization of the appropriate project management methodologies, the PMO has the authority to:
- a. Assess if a project, as part of project vetting, has appropriately identified and tailored either the Framework or alternative methods of project management.
 - b. Assess if a project's utilization of project management methodologies is of sufficient quality and rigor, throughout the entire project lifecycle.
5. In order to ensure that roles of project management are clear and accepted, the PMO has the authority to:
- a. Identify those roles and articulate them within the LBNL Project Management Policy, including the Framework and this document, with concurrence of the Laboratory Chief Operating Officer.
 - b. Observe the performance of Portfolio Project team members and provide performance-based observations to project and line management. These may be based on any aspect of project or project team performance. Particular attention will be paid to:
 - i. Appropriate use of the Framework
 - ii. Self-identification and management of risks associated with scope, timeline, budget and quality

- iii. Professional written or interactive representation of project performance
 - iv. Visible commitment to continuous improvement of the project, as well as the LBNL project management environment and culture.
6. In order to help ensure the competency of LBNL project management staff, the PMO has the authority to:
- a. Proactively engage line management regarding the performance of project staff, whether directly part of the project or in a supporting role. The PMO may convey to the cognizant management,
 - i. observations of staff performance on current or past projects,
 - ii. opportunities for performance improvement including recommendations for certification by external project management institutions or completion of LBNL training curriculum
 - b. Identify and/or establish training curricula, where individual project management training recommendations would be determined by current and forecasted project assignments
 - c. Establish a Community of Practice and motivate participation from the LBNL project management community
 - d. The PMO will develop and maintain guidelines for project management staff qualifications which will be made available to all LBL organizations. Upon request, the PMO will review specific personnel qualifications and will make recommendations with regard to their qualification for a given project management role.
 - e. Assess and communicate the LBNL-wide staffing level of project staff, both directly assigned to the project or in supporting roles appropriate to Portfolio Projects, working in concert with PIMD and other organizations as appropriate.
7. In order to ensure that oversight mechanisms are utilized and insightful, the PMO has the authority to:
- a. Assess (in the case of PIMD) or determine the content of and require project reports and metrics, written and oral, periodic and ad-hoc, encompassing:
 - i. overall project status
 - ii. risks and risk management
 - iii. recent performance, upcoming milestones, and long-term forecasts
 - iv. quantitative metrics and qualitative measures
 - b. Require periodic and ad-hoc project presentations and reports to the PMAB. Given a PMAB request, the PMO may require that the Project provide more detailed information or interaction with the PMAB
 - c. Convey independent periodic and ad-hoc project performance assessment to the respective project management, its line management, and senior laboratory management, escalating such communication as independently determined by the LPMO
 - d. Identify cross-cutting project concerns attributable to LBNL infrastructure or services and promote the resolution of such concerns.
 - i. Identification may be the result of synthesized observations of the PMAB or the PMO
 - ii. The PMO will promote resolution of such concerns with appropriate line management and escalate as necessary.






- e. Conduct Project Reviews (including Phase Gate and Annual Reviews), Project Assessments, and Vettings
 - f. Communicate directly with the Office of Project Assessment regarding project management issues pertinent to LBNL, in coordination with the Project's Senior Line Management.
8. In order to ensure the appropriate LBNL project management environment and culture, the PMO has the authority to:
- a. Communicate its review/assessment of the state of LBNL mission critical projects portfolio and its individual projects, to project managers, line managers and senior LBNL managers both on a periodic and ad-hoc basis.
 - b. Determine quantitative and qualitative measures from which to monitor and compare progress of the overall performance of the LBNL Project Portfolio as well as the entire project management environment and culture, noting any systemic issues regarding LBNL or its individual organizations.
 - c. Facilitates assessments, external reviews, and benchmark the LBNL project management environment and culture.

Accountabilities

- To the COO and Deputy Director for Operations for all aspects of PMO performance and operations including finance, human resources, environmental health and safety, quality, efficiency, sustainability, and stakeholder expectations
- To members of the LBNL Directorate and Leadership team to ensure that organizational efforts achieve the PMO mission and vision, thereby forwarding the LBNL mission, with particular emphasis on the LBNL Project Management Stewardship Statement
- To all LBNL Stakeholders, DOE, and UCNL to ensure that projects are executed consistent with LBNL Stewardship Statement regarding project management
- To Project Managers, Line Managers, and Senior Line Management, to ensure that the Project Management Office (PMO) assurance activities for the Lab's portfolio of projects is conducted independently and transparently without regard for the organization responsible for the project's execution
- To serve as a model of professional behavior, fostering a workplace that is a safe and respectful environment consistent with LBNL Stewardship Statements.

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