

PMO Structure and Implementation Plan

Seven recommendations for project intake, reporting, governance, and transition to an internal coordinator.

Prepared for Chief Operating Officer and steering group	Deliverable D2, operating model and roadmap	Decision requested at issue (week 5) Approve recommendations 1 to 7	Approval recorded Steering group, week 6
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DESIGN PRINCIPLES

- 1. Use existing tools.** Configure the licensed Smartsheet workspace for portfolio reporting.
- 2. Limit reporting effort.** Keep the weekly status update to approximately 15 minutes per project lead.
- 3. Define escalation and decision responsibilities.** Raise risks within one week and record decisions with an owner and due date.

RECOMMENDATIONS

#	RECOMMENDATION	ADDRESSES
1	Establish a PMO with one internal coordinator. The coordinator is accountable to the COO for portfolio reporting and governance, with HGMA support during setup.	Findings 1, 3, 5
2	Create one portfolio register. Every active project recorded in Smartsheet with owner, sponsor, tier, milestones, status, and material risks, actions, issues, and decisions.	Finding 1
3	Introduce tiered intake. A one-page request form. Tier 1 (under \$25,000 and 200 staff hours or fewer) approved by a VP. Tier 2 (\$25,000 to \$250,000, or under \$25,000 with more than 200 staff hours) and Tier 3 (over \$250,000) reviewed monthly by the steering group with a capacity check.	Findings 2, 4
4	Run a weekly reporting cycle. Status due Thursday at noon, consolidated portfolio view issued Friday, with written definitions of red, amber, and green. The coordinator follows up on missing, unclear, or incomplete updates.	Finding 3
5	Hold a monthly governance review. A 60-minute steering session on exceptions only. Decisions and actions are logged and tracked through closure.	Findings 3, 5
6	Review staff capacity before approving work. A simple allocation view for the IT integration team, reviewed before any new Tier 2 or Tier 3 project is approved.	Finding 4
7	Train and support project leads. Three short training sessions, a one-page guide for each process, and weekly office hours during setup.	Finding 6

INITIAL ACTIONS (WEEKS 6 TO 7)

- Pause new Tier 2 and Tier 3 starts until intake is live in week 8.
- Record the 23 decisions without assigned owners in one decision log and assign owners at the first steering session.
- Agree on red, amber, and green definitions and publish them to all project leads.

IMPLEMENTATION ROADMAP

WINDOW	MILESTONES	OWNER
Weeks 6-8	Portfolio register built and populated; intake form live; status template issued; first weekly reporting cycle runs in week 8	HGMA, PMO coordinator
Weeks 9-12	Training sessions 1 to 3; first two monthly governance reviews; capacity view live; reporting cycle stabilized	HGMA, project leads
Weeks 13-16	PMO coordinator owns the weekly reporting cycle with HGMA coaching; process guidance finalized; transition plan approved	PMO coordinator, COO
Months 5-7	90-day sustainment checklist; quarterly review of intake tiers and reporting definitions	PMO coordinator

RESOURCES AND IMPLEMENTATION RISKS

Staff time

- One internal PMO coordinator at roughly half time after transition
- About one hour per week from each project lead
- 60 minutes per month from the steering group

Risks to watch

- Reporting fatigue during the warehouse cutover; mitigated by a short template
- Coordinator not named on time; mitigated by naming a backup in week 6
- Governance meetings spend too much time on routine status updates; use an agenda focused on exceptions and decisions.