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The Journey to Project Management: Navigating the Transition from a NonProject Environment

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RESEARCH PAPER

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The Journey to Project Management: Navigating the Transition from Non-Project Environments

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1. Introduction

To facilitate a seamless transition from a non-project management environment to a project management environment, Non-Profit Organizations (NPOs) passionately dedicated to their missions and operating with limited resources can establish a Project Management Office (PMO) as a pivotal organizational function. This PMO will collaborate closely with senior executives to devise a comprehensive strategic plan for this transformation. An essential component of this plan is the identification of dedicated representatives within key departments, including IT, HR, Human Services Program, and Learning & Development. These departmental representatives will serve as proactive Project Management advocates, responsible for initiating and executing the transition strategies, all while focusing on effective change management. The transition journey commences with equipping these representatives with essential skills, starting with proficiency in Microsoft Teams as a Project Management tool.

The strategic plan developed by the PMO, in partnership with senior leadership, will outline clear objectives, milestones, timelines, and department-specific roles and responsibilities. It will also address potential challenges and strategies for risk mitigation. A pivotal aspect of this transition is the management of change, which involves engaging in proactive change management efforts, addressing resistance, communicating the benefits of the transition, and ensuring a smooth shift in organizational practices. As the transition progresses, the PMO will provide ongoing support, guidance, and regular monitoring, ensuring that the project management environment is effectively integrated into the organization. By continuously refining and optimizing the process through feedback loops and continuous improvement, the NPO can successfully evolve into a more structured, efficient, and mission-aligned entity. The

active involvement of departmental representatives, guided by the strategic direction of the PMO, is fundamental to this transformative journey.

2. Problem Statement

The NPO small businesses that are motivated towards their missions and contribute majorly towards achieving those missions and work around limited resources need a plan to function smoothly with available resources which will help them transition from a non-project management environment to a project management environment.

PMO office is situated as a functional body to manage this transition within the organization, they will diligently work with senior executives to create a strategic plan for this transition. Some of the steps they will initiate will include identifying a representative in each IT, Human Resources, Human Services Program, and Learning & Development department who will be an active Project Management representative within that department responsible for initiating and implementing the transition strategies using change management. Initially, the process starts with training them to use Microsoft Teams as a Project Management tool.

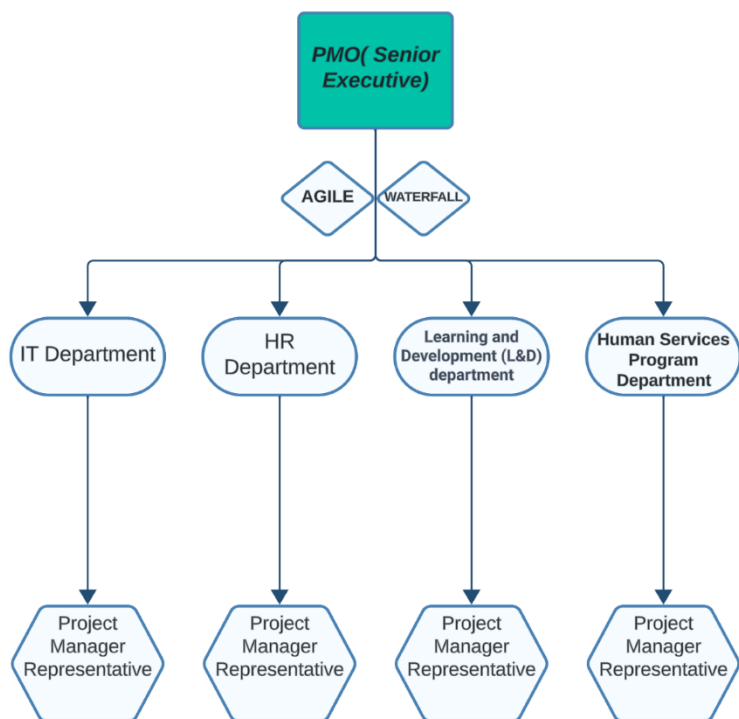


Figure 1 Project Management Office

3. PMO Strategic Decision-Making & Action Steps for Transition

3.1 Inter Cross-Departmental Collaboration Using PM Methodologies

The PMO will be the head of the transition and will oversee each step of the transition phase while having a project manager as the first point of contact during the transition phase while also being the liaison for the various department's team leads for constant communication before and during the change.

Below mentioned are the steps to follow for a clear and smooth collaboration (cross-communication) between the different departments and the project manager.

- 1) **Establishing a unified communication channel:** This project is based on the transition of Non-Project Environments to Project Management and to support this change the communication channel that we are bringing in is Microsoft Teams which will be accessible to all departments for constant communication.
- 2) **Fostering a Common Understanding of the Process:** Conduct cross-functional training sessions and courses to ensure that every member of each department has a basic understanding of project management methodologies such as Agile and Waterfall.
- 3) **Establish clear communication and cross-function protocols:** Ensure all the team members are on the same page as to the channel being used (Microsoft Teams) and schedule regular meetings while also appointing tasks to team members so that they can discuss the challenges faced and plan upcoming tasks collaboratively and proactively.
- 4) **Cross-departmental liaisons:** Each department should have a designated team lead to enhance communication and collaboration across teams.
- 5) **Project management tool integration for cross-communication:** For collaboration, task assignment, and progress tracking Project management tools such as Microsoft Project and

Microsoft Teams, which are Agile supporting tools used in project management to manage backlogs, sprint planning, tasks management, and collaboration between teams.

- 6) **Daily standup meetings and status reports:** Implement status reporting practices in the organization to track progress and project milestones as well as key performance indicators (KPIs) and schedule daily meetings to answer 3 questions

What did I do yesterday?

What am I planning to do today?

Is there anything blocking my progress?

3.2 Department Centric KPIs

IT Department

- 1) Project Timeline: Transition of Non- project management to Project management
 - KPI: Percentage based on the success rate of the transition.
 - Target: Quarterly (3 Months); 90% or higher
- 2) Technology Adoption:
 - KPI: The success rate of the newly implemented technology/ tool in the organization
 - Target: Quarterly (3 Months); 90% or higher
- 3) User Satisfaction: Tool usage by project managers, team leaders, and team members.
 - KPI: IT service desk satisfaction and difficulty level within the teams.
 - Target: Quarterly (3 Months); 80% or higher.
- 4) Risk Management:
 - KPI: Number of critical Incidents including server malfunction or data breaches per the new tool implementation.

- Target: Quarterly (3 Months); 0 incidents

HR Department

1) Training and Development Participation:

- KPI: Number of employees willing to participate in the training of the new project/ tool.
- Target: Quarterly (3 Months); 75% or higher (including employee retention during the pilot phase of the project)

2) Talent Acquisition Efficiency:

- KPI: Hiring essential employees for critical positions during the transition period includes hiring staff when prior personnel resigns.
- Target: within 30-45 Days; measure the retention rate every 2 months.

3) Employee engagement:

- KPI: Internal anonymous surveys will be used to gather information regarding the outcome of the change.
- Target: Every month; 75% or higher.

4) Effectiveness of the transition:

- KPI: Employees who can cope with the change and are at ease during the transition.
- Target: Quarterly (3 Months); 75% or higher

Learning and Development (L&D) Department

1) Impact of training:

- KPI: Increase in tool proficiency following training.
- Target: Quarterly 2 months; 70% or higher

2) Learning Program Completion:

- KPI: Mandatory courses completed by the employees for additional knowledge per the transition.
- Target: Quarterly (2 months); 90% or higher.

3) Feedback and Continuous Improvement:

- KPI: Feedback based on participant feedback after training of employees.
- Target: At least 2 per quarter.

4) Reducing Skill Gaps:

- KPI: Number of people identified as having difficulty with the tool after training and during the pilot phase of the project.
- Target: 15% or lower

Human Services Program Department

1) Customer Impact:

- KPI: Number of customers benefitting from the transition phase:
- Target: 90 % or higher

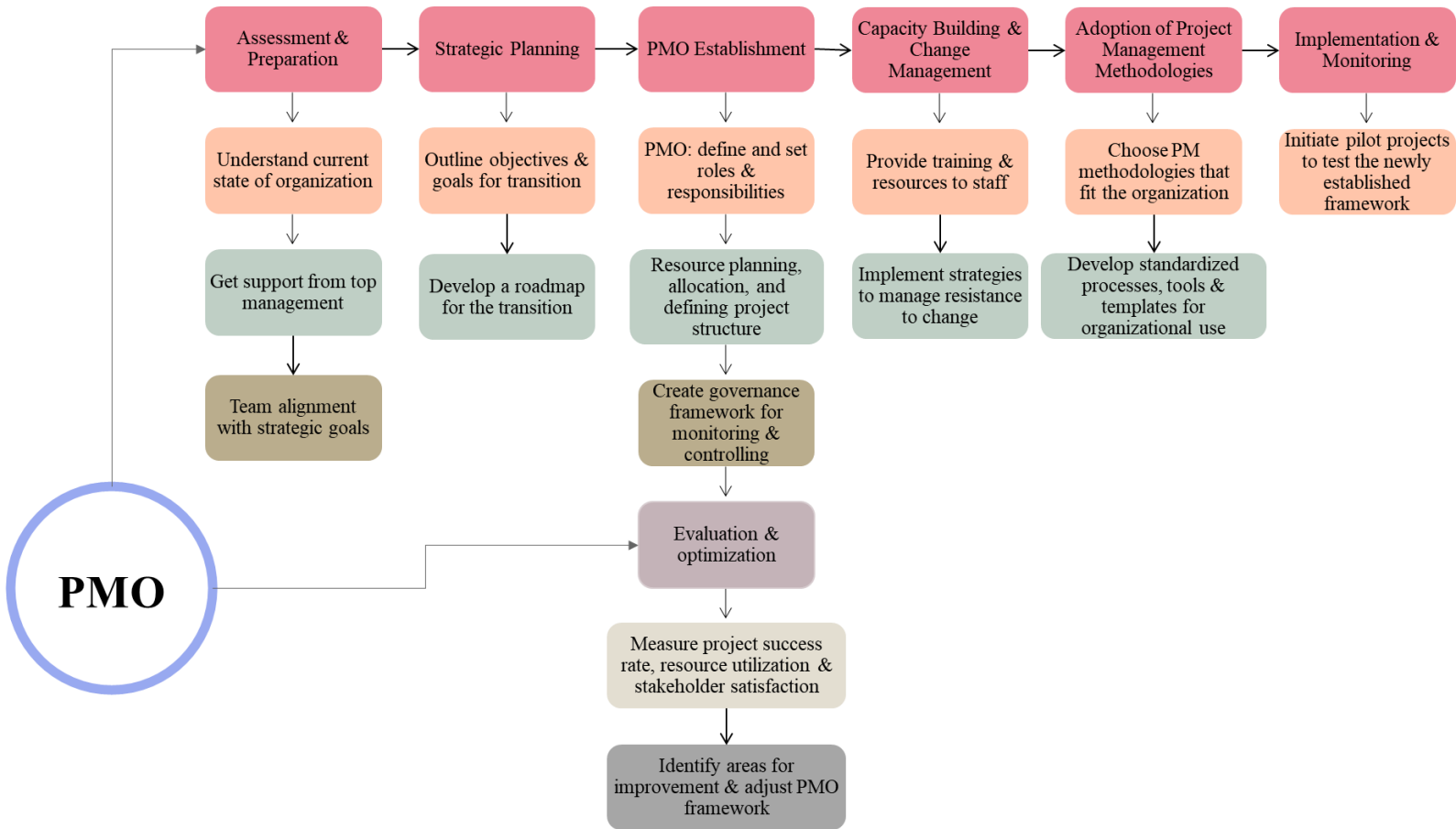
2) Project Efficiency:

- KPI: Success rate of the project by the end of every quarter
- Target: Quarterly (3 Months); 30% or higher

3) Assets Allocation:

- KPI: Determine if the project is completed within budget.
- Target: Quarterly (3 months) 75% or higher

3.3 PMO Framework



4. Characteristics of the Project Management Representative

One individual will be identified as a Project Management Representative from the specific department with specific characteristics that make them well-suited for the role. The following traits along with the necessary skills and experience with the project are valuable for the individual-

1. **Strong communication Skills (MUST HAVE):** Project Managers need to interact with diverse stakeholders in a project, communicating project goals, timelines, and updates to team members and stakeholders.

2. **Leadership Ability (MUST HAVE):** The Project Manager should inspire and motivate team members to achieve project goals and be able to make informed decisions quickly through critical thinking, considering the project's objectives and constraints.
3. **Ethical Conduct and Integrity (MUST HAVE):** Upholding ethical standards and ensuring transparency in project management activities is crucial for maintaining trust among team members and stakeholders.
4. **Organizational and risk management skills (GOOD TO HAVE):** The project manager should be organized and be able to take proactive planning to mitigate and plan forecasted risks associated with the project.
5. **Assertive (MUST HAVE):** The project manager should be confident and have interpersonal and conflict resolution skills to resolve any conflict between team members or stakeholders.
6. **Empathy and Understanding Stakeholder Needs (MUST HAVE):** Active listening is important as the representative needs to understand the needs and concerns of team members and stakeholders as it is crucial for the success of the project.
7. **Project Experience (GOOD TO HAVE):** Having some project experience is good to have in the representative as then they can understand the workflow of the project more efficiently and result in project success.

5. Change Management Models for Transition

Non-profit organizations can benefit from this model to transition from a non-project management environment to a project management environment. For instance, Kotter's model can help non-profit organizations establish a sense of urgency and create a guiding coalition to develop a strategic vision and initiatives. The model can also help non-profit organizations

communicate the vision for buy-in, empower others to enact action, generate short-term wins, and sustain acceleration.

5.1 Research Question

5.1.1 Primary Question

How can NPOs effectively transition to project management, and what is the role of change management in this process?

5.1.1.1 Sub Question

To fully address and respond to the primary question above; the following questions are considered:

- Are change management processes for-profit organizations applicable to NPOs' transition?
- What are the key challenges and barriers specific to NPOs in implementing change management strategies?
- What are the best practices for effectively communicating the benefits of the transition to project management to NPO staff and stakeholders to minimize resistance?

5.2 Lewin's Three-Step Model

Lewin's Three-Step Model consists of three stages: Unfreeze, Change, and Refreeze.

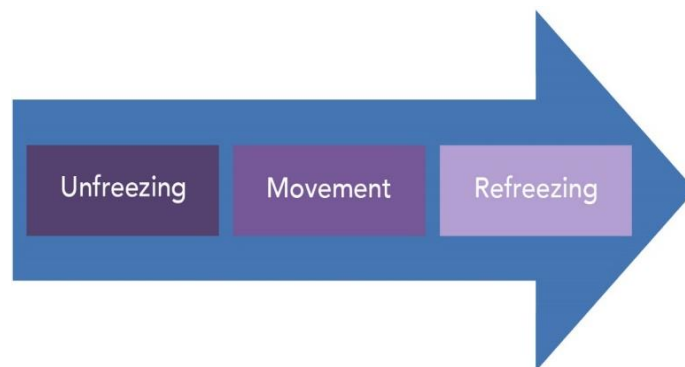


Figure 2 Lewins Three-Step Model

Note. From Libretexts, 2022

- The first stage, **Unfreeze**, involves understanding the motivation for change and developing a compelling message to explain why the old ways of doing things cannot be sustained and providing a vision for the future.
- The second stage, **Change**, involves accepting the change plan and transitioning to the new way of doing things. It's especially important at this stage that employees and leaders take an active role in the changes.
- The final stage, **Refreeze**, involves managing for consistency so that the changes are internalized by staff, monitored for reinforcement, and adjusted if needed

5.3 Kotter's Eight-Step Model

Kotter's Eight-Step Plan for Implementing Change Management is a more detailed approach to change management. Kotter's model has been designed with organizational change in mind.

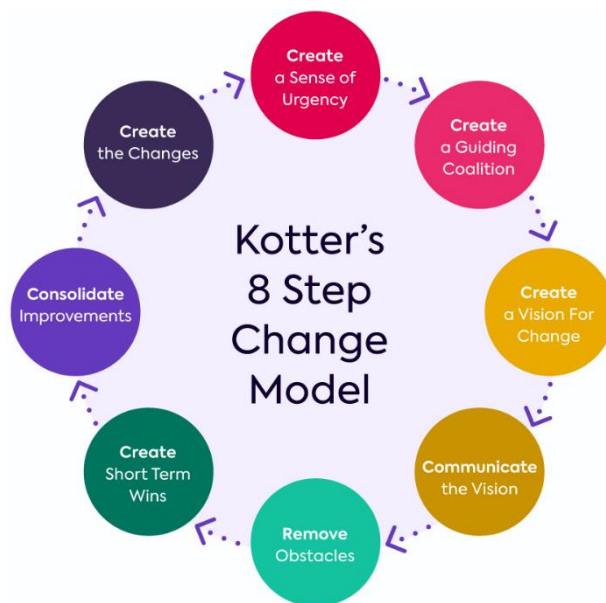


Figure 3 Kotter's Eight Step Model

5.4 Combined Transition Model

Combining Lewin's 3-Step Model and Kotter's 8-Step Model provides a comprehensive framework for effective change management in the transition from a non-project management to a project management environment.

- Use Kotter's model to instill a sense of urgency and form a coalition for the transition.
- Apply Lewin's model during the change phase to introduce project management methodologies.
- Leverage Kotter's steps to communicate the vision, empower stakeholders, and achieve short-term wins.
- Use Lewin's model to reinforce and institutionalize the changes during the refreezing stage.

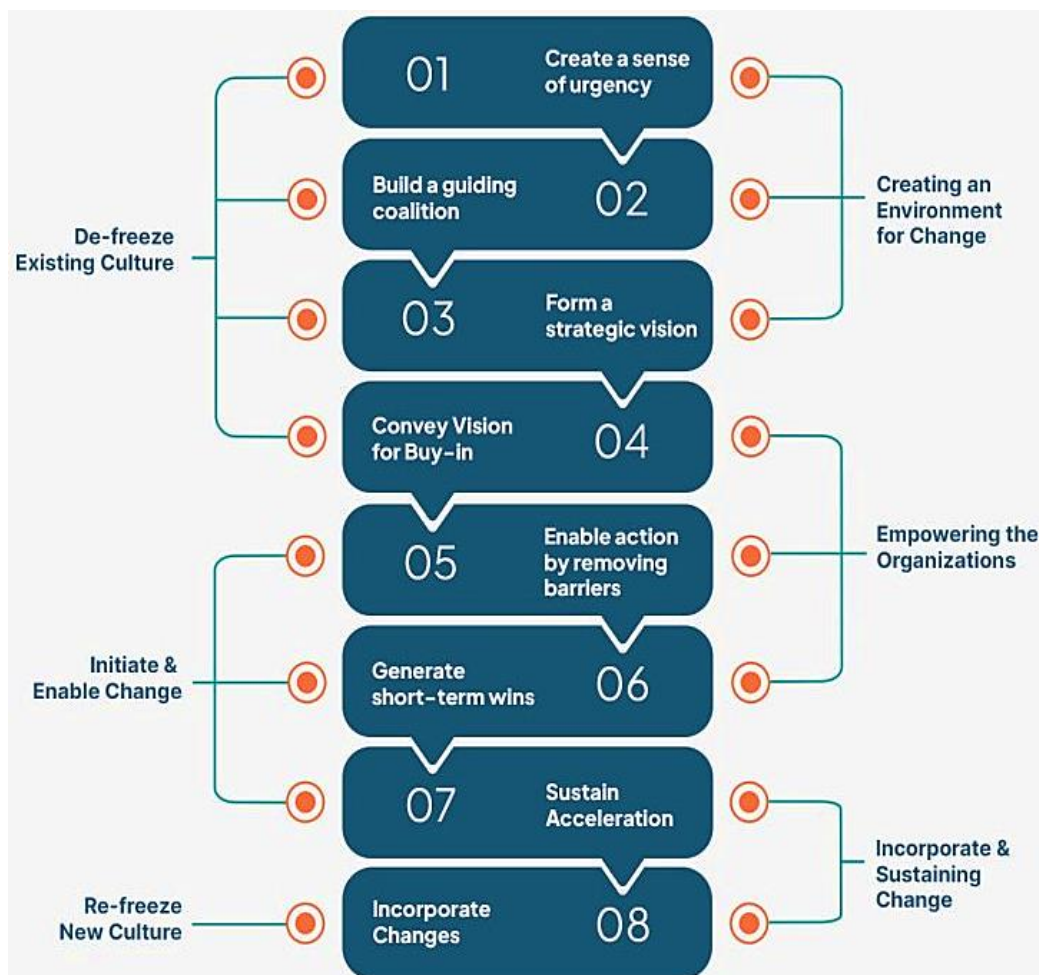


Figure 4 Transition Model

Note. From (Bedard, 2023)

6. Microsoft Team Course Overview

Introduction: “Managing Projects with Microsoft Teams” certification through LinkedIn learning, is reviewed and approved by the PMI Authorized Training Partner Program. This course qualifies for professional development units (PDUs). This course includes creating a team and channels, working with files, tracking tasks, connecting SharePoint lists and pages, taking notes, managing meetings, collecting feedback, and keyboard shortcuts.

Setting up a Team Structure: This course helps in learning to create a team’s channel from prebuilt templates or from scratch for a project. In addition, it gives a guide to adding channels to the team and inviting team members and guests to the group along with managing team setting and permissions.

Managing Files: Managing project files through teams is a learning outcome from the course by learning to work with channel files, attaching files in a channel conversation, and attaching them in private chats. Moving them from OneDrive to Teams and authorizing files, managing file versions, connecting a document library from another team, searching for content in the file, and setting the file open preferences.

Tracking Tasks: Tracking tasks is a great tool for creating planners’ boards in the channel, creating task buckets, and creating and assigning tasks in the team’s channel. It is also helpful in managing and reporting tasks and the course also gives a guide to create a task from a channel conversation or chat message.

Working with Pages and Lists: The list feature helps create a list, manage it, and connect with SharePoint. OneNote is also a great application attached to Teams which can be used for meeting notes and documenting lessons learned during a project.

Taking Totes: OneNote can be useful for adding a notebook to the team's channel and taking project notes.

Managing online meetings: The course gives a guide for starting an impromptu team meeting, scheduling a team's meeting from the channel, facilitating a team's meeting, using the breakout rooms feature, and using team meeting templates to create meetings for specific scenarios. The translation and preferred language feature can also help make meetings more inclusive and teams can also generate automatic meeting notes, tasks, and other content with the Teams Premium intelligent recap using AI.

Collecting feedback: Microsoft Forms is a great tool that can be integrated into Microsoft Teams to collect feedback, and surveys and set up polls to gather feedback and collective responses in a project.

Working with Templates: Microsoft Teams can also be used to create a new Teams channel with existing Teams templates and the tools and format can also be transferred.

Conclusion: The "Managing projects with Microsoft Teams" certification is a really good resource for training people to manage projects using existing Microsoft Teams licensing and can be used as training material to train to handle projects in an organization.

7. Project Plan

7.1 Resource Requirements

The transition of Non-Profit Organizations (NPOs) to project management through change management requires a diverse set of resources to ensure a smooth and successful transformation. Human capital, including a skilled project management team and dedicated departmental representatives, is crucial for planning, executing, and communicating the transition. Financial resources are essential to support training programs, technology adoption, and unforeseen expenses. Material resources, such as training materials and documentation tools, facilitate effective communication and knowledge transfer. IT resources, including licenses, support, and security measures, are vital for the adoption of project management tools and ensuring a seamless technological transition. Collectively, these resources empower the organization to navigate challenges, mitigate risks, and optimize its operations, fostering a culture of efficient project management and contributing to the overall success of the organizational transformation.

- 1) **Human Capital:** Senior Executives, Project Manager, Change Management Specialist, Communication Lead, Subject Matter Experts (SMEs), Data Analysts, IT, HR, and Learning & Development representatives.
- 2) **Financial Resources:** Budget for training programs, Microsoft Teams software licenses, Contingency budget for unexpected expenses, and project grants.
- 3) **Material Resources:** Training materials for Microsoft Teams, Data security software, Documentation tools for project plans, risk registers, and progress reports, Meeting rooms and facilities for training sessions, and Projectors.

- 4) **IT Resources:** External communication channels (e.g., social media for marketing like LinkedIn, Facebook, etc.), Help Desk, Cloud Management, Firewall, and Antivirus.

7.2 Staff Resource Planning

RESOURCES	PHASES					
JOB TITLE	Conceptual (10)	Planning (13)	Execution (17)	Closure (5)	Contingencies (8)	TOTAL
Project Manager (PMO)	10	13	17	5	8	53
Change Management Specialist	10	14	17	4	8	53
Subject Matter Experts (VPs)	6	15	22	2	8	53
Data Analyst	5	10	24	6	8	53
IT Representative	10	13	17	5	8	53
HR Representative	14	12	15	4	8	53
L&D Representative	8	18	17	2	8	53
TOTAL FTEs	63	95	129	28	56	371*

Table 1 Staff Resource FTEs

Note: Full-time equivalent (FTEs) are hours worked by employees. 40 hours of work is 1 FTE.

Calculation: 12 months project transition has 53 weeks.

*53 weeks x 7 staffs= 371 weeks

STAFF RESOURCE PLAN HISTOGRAM

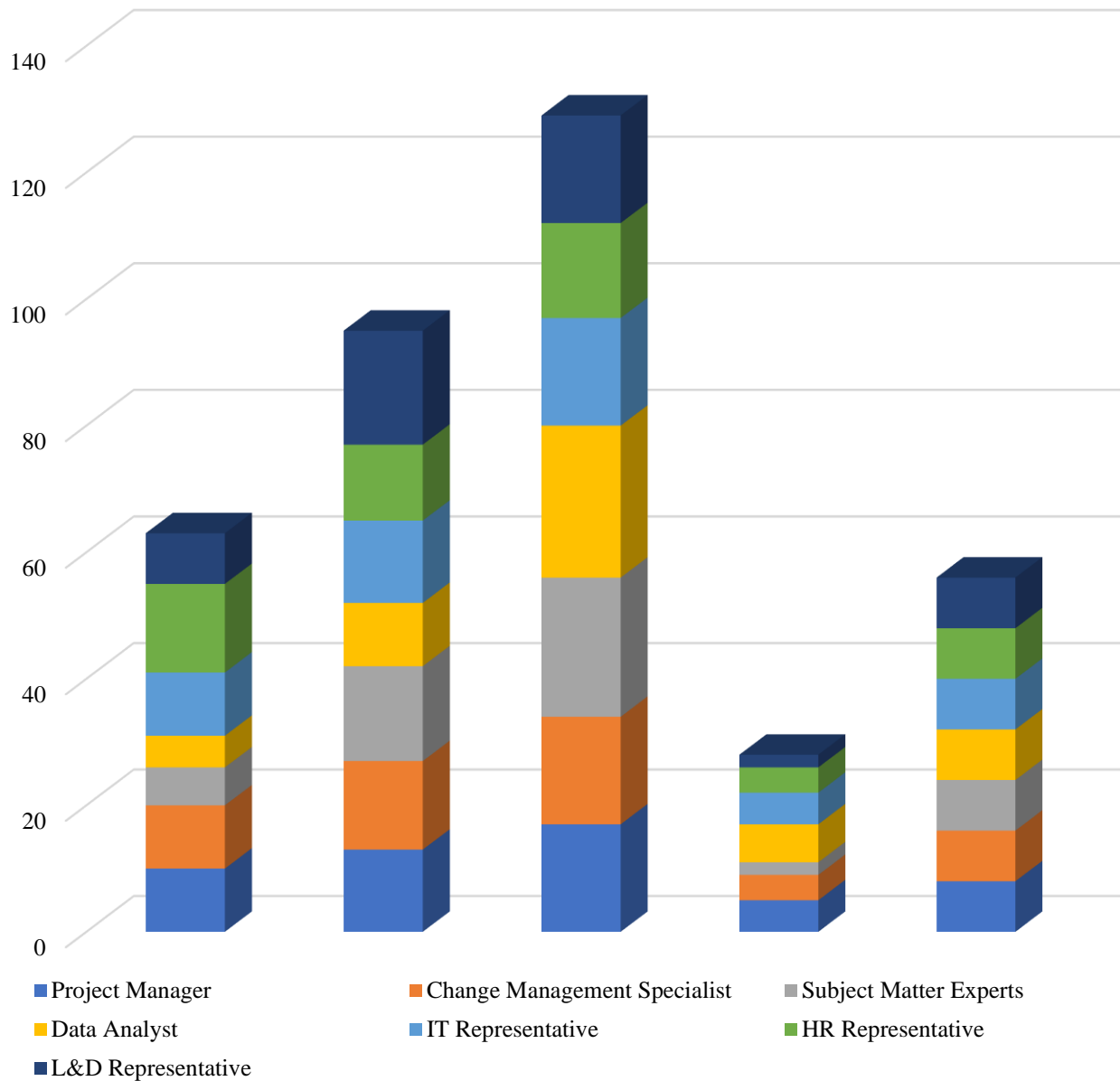


Figure 5 Staff Resource Histogram

Assumptions

- All the resources will work an eight-hour shift every day. Their input in the transition project will be different as per the requirements in each phase.

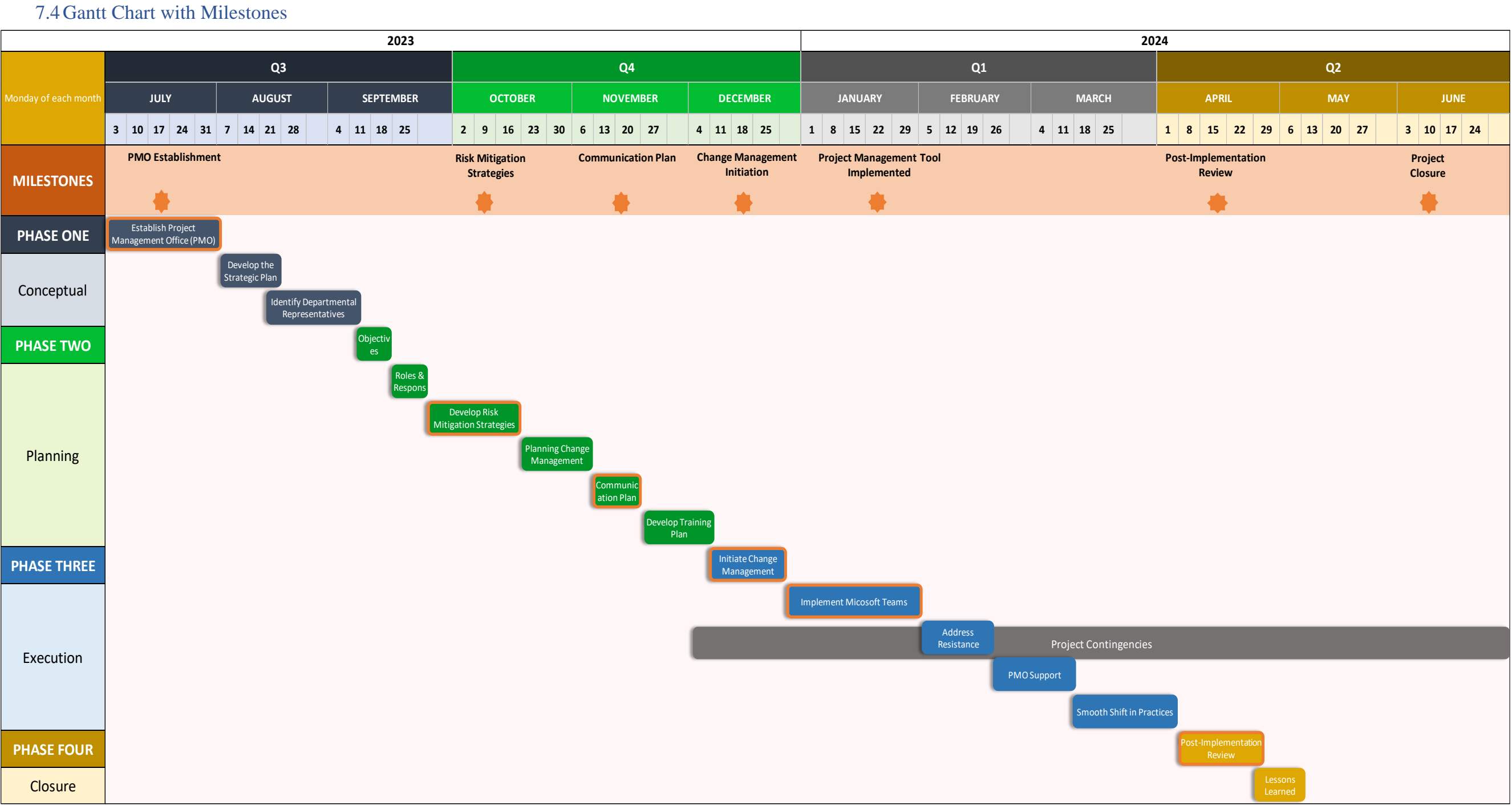
- Each role listed represents a single individual, ensuring that all resources are considered as one person in the calculations.
- Number of weeks each phase
 - Conceptual- 10 weeks
 - Planning- 13 weeks
 - Execution- 17 weeks
 - Closure- 5 weeks
 - Contingencies- 8

7.3 Transition Project Plan

Assumption- 500 mid-size employee company. 10 months to complete and 2 months contingency. Including breaks (holidays). Project Contingencies can be anywhere between the execution phase and the closure phase.

TASKS	TASK DESCRIPTION	START DATE	END DATE	DURATION (DAYS)
I	Phase 1: Conceptual			65
1	Establish Project Management Office (PMO)	7/3/2023	8/1/2023	30
2	Develop the Strategic Plan	8/2/2023	8/21/2023	20
3	Identify Departmental Representatives	8/22/2023	9/6/2023	15
II	Phase 2: Planning			90
4	Outline Objectives and Milestones	9/7/2023	9/16/2023	10

5	Define Department-Specific Roles and Responsibilities	9/17/2023	9/26/2023	10
6	Develop Risk Mitigation Strategies	9/27/2023	10/16/2023	20
7	Planning Change Management Steps	10/17/2023	11/5/2023	20
8	Develop Communication Plan	11/6/2023	11/20/2023	15
9	Develop Training Plan	11/21/2023	12/5/2023	15
III	Phase 3: Execution			120
10	Initiate Change Management Efforts	12/6/2023	12/25/2023	20
11	Implement Project Management Tool	12/26/2023	2/4/2024	40
12	Address Resistance & Communication Benefits	2/5/2024	2/25/2024	20
13	Ongoing Support & Guidance from PMO	2/26/2024	3/17/2024	20
14	Smooth Shift in Organizational Practices	3/18/2024	4/7/2024	20
IV	Phase 4: Closure			30
15	Post-Implementation Review	4/8/2024	4/28/2024	20
16	Lessons Learned Review	4/29/2024	5/9/2024	10
17	Project Contingencies	5/10/2024	7/9/2024	60



7.4 Work Breakdown Structure

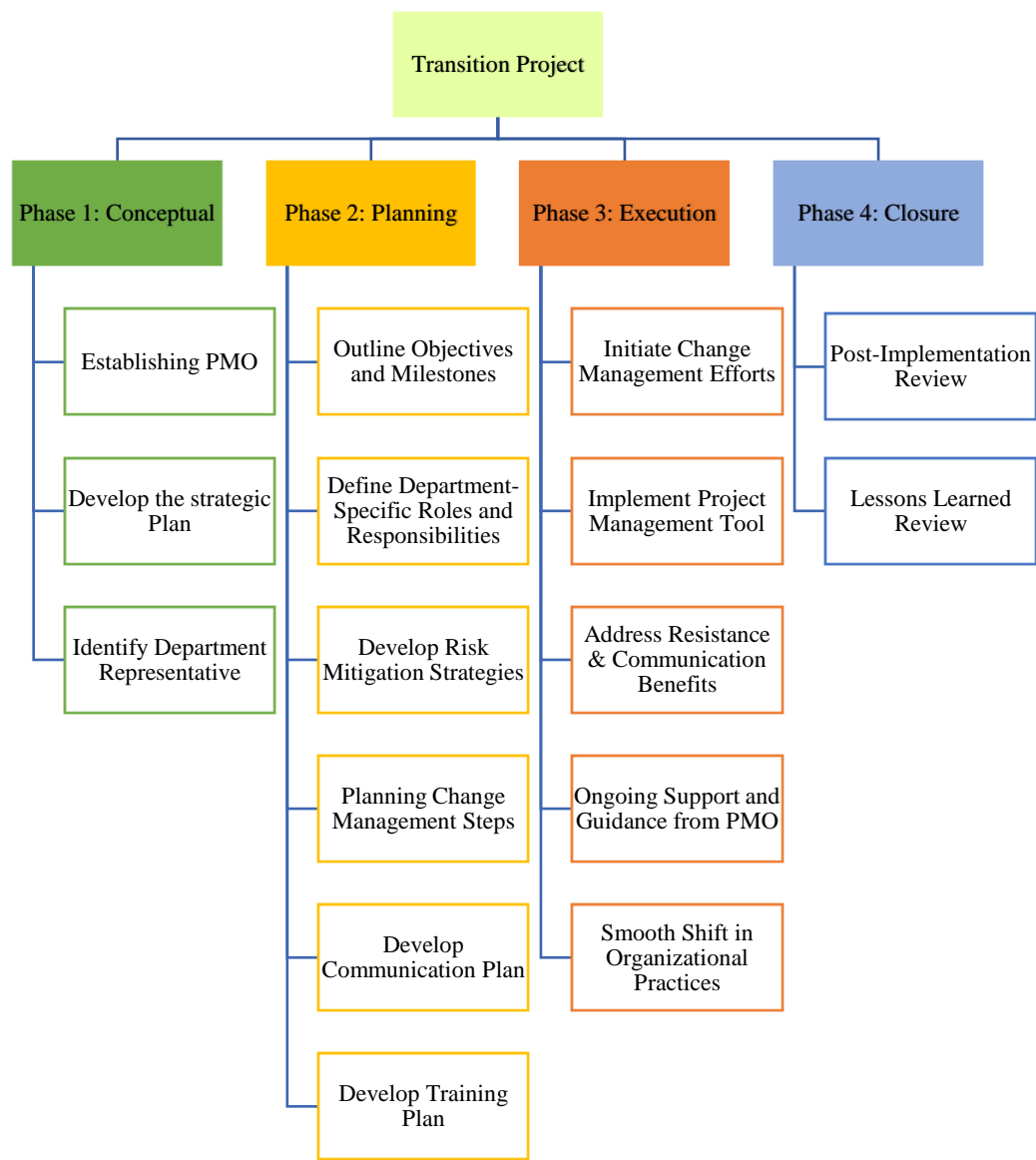


Figure 6 Work Breakdown Structure

7.5 Communication Plan

Communication	Audience	Goals	Schedule	Format	Responsibility
Team Meetings	PMO team	Workgroup meetings	Weekly	Microsoft Teams	PMO
1-1 Meetings	PMO and Department PM representative	Follow-up	Weekly	In-person or Microsoft Teams	PMO and PM representative
Department Meetings	PM Representative and Department project team	Project Status, reviewing the timeline and risk register	Weekly	Microsoft Teams	PM representative

Training	PMO and PM Representatives	Training with Change management tactics	Twice a month	In-person	PMO
Department Meetings with PMO	PMO, PM Representative, and project team	Project status	Twice a month	Microsoft Teams	PM representative
Training	PMO and PM Representatives	Training PM Methodologies & tools	Weekly	In-person	PMO
Milestone Update	PMO and Senior Executives	Reviewing status, deciding on next steps, and collecting feedback	Monthly	Microsoft Teams	PMO
Project Evaluation	PMO, Sponsor (COO), and PM representatives	Project evaluation	Monthly	Microsoft Teams	PMO
Operational feasibility	PMO and Sponsor (COO)	Resource evaluation & determining feasibility of the project	Twice a month	Either in-person or Microsoft Teams	PMO
Lessons Learned	PMO, PM Representative, and Project team	Summarize experience, lessons learned, and reporting final Project	Closeout of project	Microsoft Teams	PM Representative

7.6 Department Internal Communication

Communication	Audience	Goals	Schedule	Format	Responsibility
Workgroup Meeting	Project Team	Workgroup Meetings	Weekly	Microsoft Teams	Project Manager Representative
IT Department	IT Project Team	Project Status	Twice a week	Microsoft Teams- Agile	Project Manager Representative
Learning & Development Department	L&D Project Team	Project Status	Twice a week	Microsoft Teams- Agile	Project Manager Representative
Human Resources Department	HR Project Team	Work Meetings	Thrice a week	Microsoft Team	Project Manager Representative
Human Services Program Department	Project Team	Work meetings and ongoing project discussion	Weekly	Microsoft Teams- Waterfall	Project Manager Representative

7.7 Stakeholder Management Plan

1. **Senior Executives-** Senior executives will need to be kept satisfied as they are the major stakeholders in each project of the organization but will have low interest in the specific projects as their interest will be divided between multiple projects ongoing at the same time in the organization.
2. **Project Management Office-** PMO being the owner of the project, holds the utmost interest and power in the project, they are supposed to be closely managed and responsible for upholding the status of the project.
3. **Project Management Representatives-** Project Management representatives being the liaison between the PMO and their department, responsible for internal projects will be kept informed as they hold a high level of interest in this project.
4. **Project Teams-** The Project Team is the focal group of people interested in the success of the project but do not hold much decision-making power and will be kept informed of any updates, changes, and progress in the project.

5. **Vice Presidents of Department-** Each Vice President of the department would be highly powerful in making decisions related to the project, but their attention and interest would also be divided between multiple projects, so they need to be kept satisfied with the project results and progress.
6. **Sponsor-** Usually, the Chief operational officer being the Sponsor of the operational efficiency projects is highly invested and upholds power in the executive body should be managed closely as they will be the ultimate decision-maker on most things.
7. **State Government-** Non-profit organizations do not have any owner but they have the state government as the primary governing body as they are responsible for regulating NPOs and they are supposed to be closely managed to keep satisfied with the work and progress of the project and overall organizational success.
8. **Business Departments-** All the employees in business departments have low interest and power in this project as they will not be closely invested in the project work but need to be monitored as it contributes to the workflow efficiency and effectiveness of the organization.

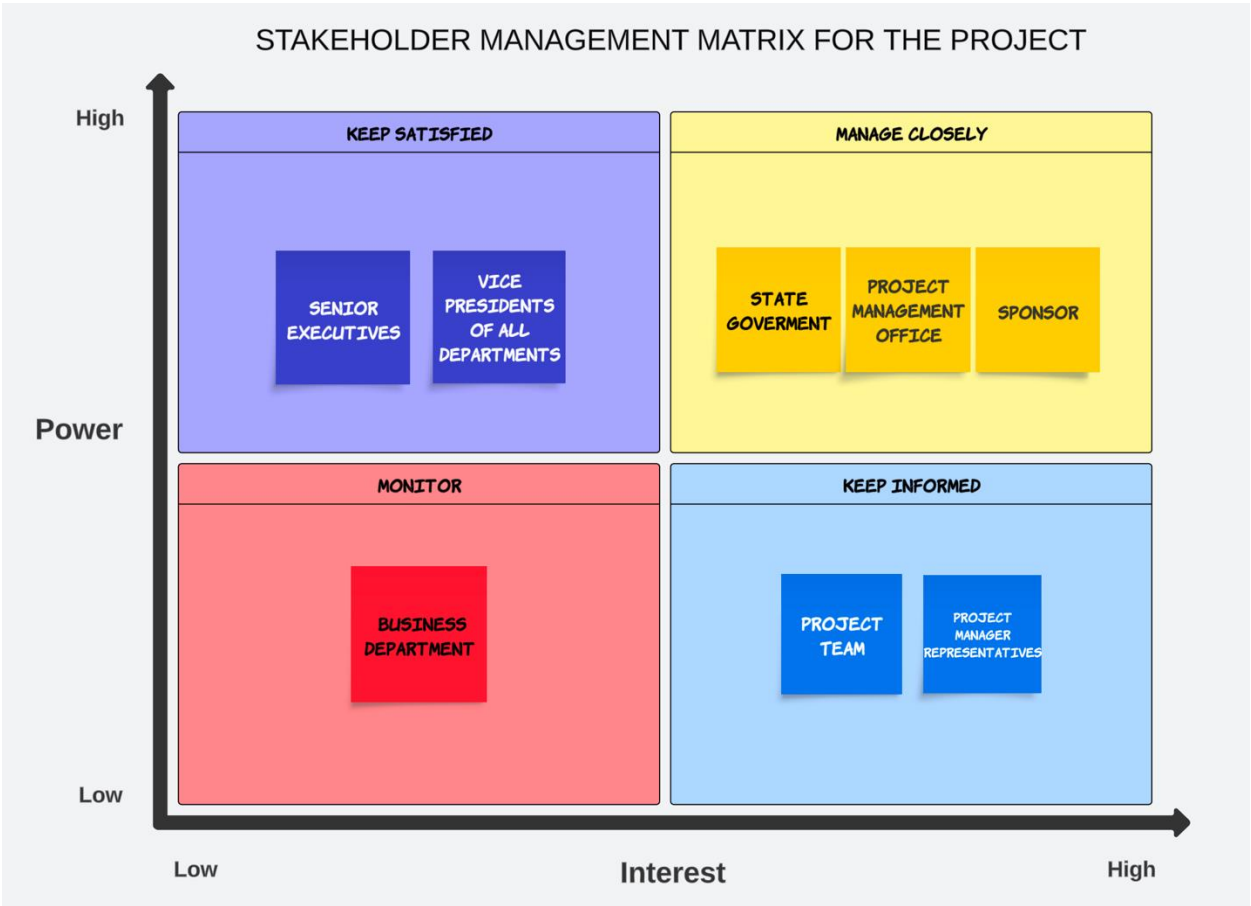


Figure 7 Stakeholder Matrix

7.8 RACI Matrix

R (Responsible): The person or department responsible for the task.

A (Accountable): The person who is accountable and has authority over the task.

C (Consulted): Individuals or departments that provide input or expertise during the task.

I (Informed): Individuals or departments that need to be kept informed about the progress of the task but do not play a direct role in its execution.

- 1. Senior Executive
- 2. PMO
- 3. Project Management Representative
- 4. Project Teams
- 5. Vice President of Departments
- 6. Sponsor
- 7. State Government
- 8. Business Department

Task Activity	1	2	3	4	5	6	7	8
Communication Plan	I	A	R	I	R	C	I	I
Regular Stakeholder Updates	C	A	R	I	C	C	I	I
Engage Senior Executives	R	A/C	I	I	I	C	I	I
Collaborate with PMO	R	A	R	I	C	C	I	I
Liaise with Project Management Representatives	I	C	A	R	C	I	I	I
Keep Project Teams Informed	I	C	A	R	C	I	I	I
Update Vice Presidents of Department	I	A	C	I	R	I	I	I
Report Progress to Sponsor	I	A	I	I	C	R	I	I
Address State Government Regulations	A	C	I	I	C	C	R	I
Monitor Business Departments' Impact	I	C	C	I	A	I	I	R

7.9 Risk Analysis and Risk Register

Conducting a thorough risk analysis for transition is crucial to identify potential risks that could impact the project's success. By proactively addressing these identified risks and implementing appropriate mitigation plans, the project can minimize the impact of these risks and increase the likelihood of a successful outcome. The below risk register shows the known risks at the beginning of the transition project. It's essential to regularly review and update the risk register throughout the project to ensure that new risks are identified and managed appropriately.

Note: In this table, 'Financial' is used for risks related to budget and resource constraints, 'Strategic' for risks related to the overall strategy and commitment to the transition, and 'Performance' for risks affecting project execution and outcomes.

Risks	Risk Type	Risk Description	Impact Level	Probability Level	Mitigation Plan
Data Migration	Financial	Compromised system functionality, data inaccuracies, potential delays in implementation	High	High	Conduct thorough data mapping and quality assessments, and have backup plans
Resistance To Change	Strategic	Staff may resist the change due to unfamiliarity with PM	High	Medium	Proactively manage change, communicate benefits & ensure a smooth shift.
Technology Adoption	Performance	Difficulty in adopting Microsoft Teams for project management	High	Medium	Provide additional support, tutorials, and IT assistance
Project Scope Creep	Performance	Scope of the project expanding beyond initial estimates	High	Medium	Implement robust change control procedures
Resource Constraint	Financial	Limited financial and human resources for the transition	High	Low	Allocate resources effectively and prioritize tasks

Lack Of Executive Support	Strategic	Senior executives not fully committed to the transition	High	Low	Secure executive buy-in
Inadequate Training	Performance	Inadequate training for departmental representatives	Medium	Low	Equip representatives with essential skills, and focus on Microsoft Teams
Ineffective Communication	Performance	Ineffective communication leads to misunderstandings	Low	Medium	Establish clear communication channels, and provide regular updates.

7.10 Financial Analysis

Assumptions

- The average salary is counted for each staff member with a least 5 years of experience.
- Expenses for IT-related tools, including cloud management, antivirus, and firewall, are based on the scale of a mid-size non-profit organization with approximately 500 employees.
- Resource sharing with other organizational projects includes staff & necessary resources.

Financial Analysis	
Operating Expenses	\$ 589,900
Staff Salaries	\$ 588,000
Printing Machine	\$ 700
Projector for Training	\$ 800
LinkedIn Learning Subscription	\$ 400
Capital Expenses	\$ 99,300
Yearly Microsoft Teams License	\$ 300
Contingency Unexpected Expenses	\$ 50,000
Microsoft Cloud Management	\$ 45,000
Firewall	\$ 2,000
Norton Antivirus	\$ 2,000
PROJECTED TOTAL	\$ 689,300

Table 2 Financial Expenses

Financial Analysis

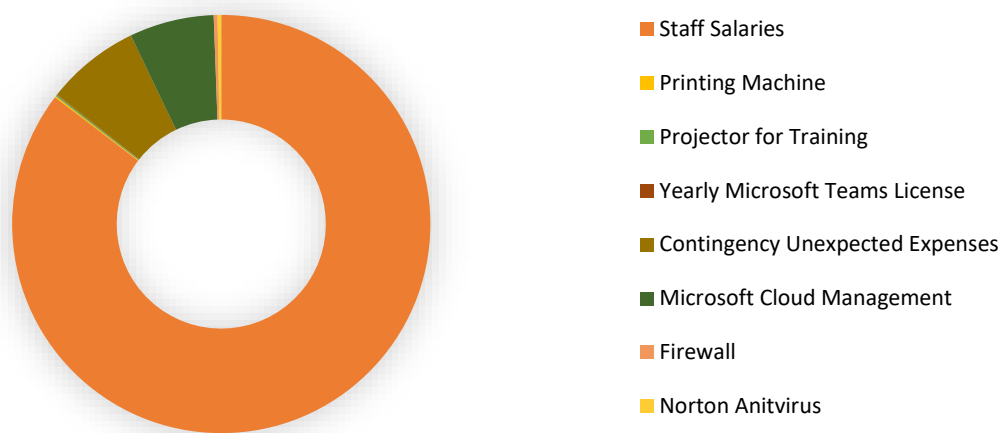


Figure 8 Financial Analysis Donut Graph

8. Post Implementation Plan

- Resource Allocation and Sustainability Planning:** Post Implementation, the project team needs to ensure to optimal use of existing resources and support the projects creating a long-term plan to integrate project management strategies into organizational culture.
 - Training and Capacity Building:** Create a continuous learning program for learning project management skills for employees to stay updated and provide ongoing training sessions for project management principles, tools, and methodologies for new and existing employees.
 - PMO Office Optimization:** Reviewing and updating PMO support based on the evolving needs of the organization.
 - Collaboration and Knowledge Sharing:** Promote cross-functional collaboration to leverage diverse skills and perspectives and create a common forum to share experiences, challenges, and best practices.
- Review and Audit:** Conduct quarterly audits to assess the ongoing effectiveness of the project management environment identify areas for improvement and make corrective action plans if needed.
 - Performance Measurement and Metrics:** Regularly evaluated and report the performance of project management establishment using set KPIs for each department.
 - Evaluate the transition:** Gather feedback from stakeholders and identify areas for improvement.

- **Documentation and Knowledge Repository:** Establishing a documentation process for knowledge sharing and lessons learned.
 - **Celebrating Success:** Acknowledge the project successes, both big and small by recognizing the efforts of the project team to boost their morale and motivation.
- 3. Project Portfolio Management:** Create a robust project portfolio management process to prioritize and manage multiple projects effectively and regularly review them to ensure their alignment with the organizational structure.
- **Project Management Tools and Software:** Make necessary updates or changes to align with technological and organizational evolving needs for project management tools and software if needed.
 - **Communication Strategy:** Create a transparent open communication strategy to ensure transparency with the stakeholders and to share successes and failures for the lessons learned document.
 - **Change Management:** Implementing change management strategies to address resistance and ensure sustained adoption. Also, providing support, if needed.
 - **Continuous Improvement and Lessons Learned:** Constantly review and update project management process based on organizational need and encourage feedback for implementation lessons learned from completed projects.

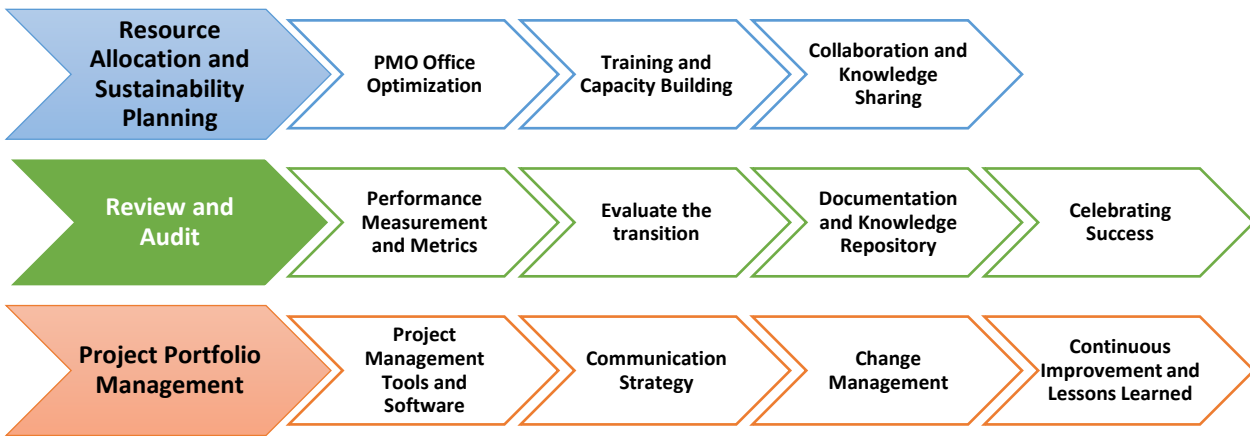


Figure 9 Post Implementation Plan

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Appendices

Appendix A- Research Charter

RESEARCH CHARTER

PROJECT OVERVIEW

Introduction

The need for radical change has grown more obviously in the constantly changing landscape of nonprofit small enterprises committed to providing human services. This research charter is prepared to investigate the critical initiatives that will help such organizations, shedding light on their journey towards project management-focused structures, all within the context of their unwavering commitment to support and empower individuals facing significant life challenges.

- We delve into project management practices across organizations, focusing on the pivotal role played by **Microsoft Teams** in communication and data management.
- We study why effective **change management** is crucial. By applying John Kotter's renowned model, we explore creating urgency, forming coalitions, and anchoring changes in corporate culture.
- We unravel how assessing and selecting **project management methodologies** can be tailored to the unique needs of each department within the organization.

Major Stakeholders

STAKEHOLDERS	ROLE/RESPONSIBILITY
Senior Executive	CEO, COO, and other senior executives who will provide strategic direction and resources
Project Manager (Project Management Office)	Will ensure effective project execution
Vice Presidents of Departments	Tailor methodologies for their units.
IT Department	Support technology adoption, especially Microsoft Teams
HR Department	Facilitate change management. Facilitating organizational structure shift.
Finance Department	Manage financial resources and budgets
Frontline Staff and Employees	Their buy-in, cooperation, and feedback will significantly impact

(Business Departments)	the practical implementation
Marketing Department	Communicating project updates and milestones, fostering awareness and support
Subject Matter Experts (SMEs)	Providing expertise to specific focus areas.
Donors/ Fundraising Partners	Provide funding or support, making their continued engagement vital
Union/s	Making sure that the organizational changes align with labor agreements and benefit employees.

Engaging these stakeholders early ensures alignment with project goals, with room to include more as needed.

PROJECT GOALS AND SCOPE

Project Goals

1. **Adoption of Project Management Methodologies in internal departments:** Studying the Project Management methodologies used within departments in an organization.
2. **Professional Development of Project Management Professionals and Knowledge Sharing and Replicability:** Using limited resources such as Microsoft License including Teams to manage day-to-day operations and Project management strategies using Teams.
3. **Successful Transition and Achievement of Strategic Goals:** The successful transition from a Non-Project Management environment to a project management environment using change management strategies to make the transition easy for everyone.
4. **Enhanced Cross-Functional Communication and Tool Utilization:** Study the formal communication protocol used to communicate within an organization.
5. **Time management with Improved Project Execution and Efficiency:** Increased effectiveness of departments for their operational work.
6. **Effective Change Management and Reduced Resistance to Change:** Studying change management Kotter’s model for effective change includes creating urgency, forming a coalition, and anchoring changes in corporate culture.

Project Scope

WORK AREA	IN SCOPE	OUT OF SCOPE
Industry	Non-profit small businesses in Human Services	Non-human service sectors
Technology	Microsoft	Any other technology
Training	Project Management methodologies within the department, change management strategies according to Kotter’s Model	Project Management skills for cross-functional operations, change management strategy apart from Kotter’s Model
Training of Teams	Project Management using Teams	Any operational work outsider Teams
Change management	Kotter’s model for effective change includes creating urgency, forming a coalition, and anchoring changes in corporate culture.	Other change management methods
Communication Protocol	Communication within the organization for Internal Departments including- HR, IT, Senior Leadership, Data Analytics, Marketing	External Vendors, clients, and customers
Project Management Methodologies	Methodologies we are considering	Methodologies we are not considering

ASSUMPTIONS

For our project of transition from a Non-Project Management environment to a project management environment in the health care services foundations.

Mentioned below are a few assumptions:

- The different teams and administrations that are present within the organization such as Leadership (CEO, COO, Other Executives), Project Managers, IT Department, Human Services, Finance Department and Marketing Department. All the teams have a focal leader and a focal point to connect with, and all the foundation's teams will use Microsoft Teams as their primary point of contact to collaborate and organize tasks and project specifics.

- **Integration with Existing Systems:** If the organization already uses other software or systems for specific tasks (e.g., Finance, HR, support staff), integrating Microsoft Teams with these systems to promote cross-functional communications between teams.
- Microsoft Teams will provide constant communication and to-do task lists throughout the day.
- For the transition to a project management environment using Microsoft Teams, a PMO office team will be established to educate both new and existing personnel so that they are well acquainted with the tool and find it simple to interact and coordinate.
- Assemble a new change management team with a restricted budget to develop and embed the indicated change in the organization. They can effortlessly implement changes with the support of change management strategies.
- Each team member will contribute equally and in a timely manner.
- Finding an adequate number of resources for research to solidify the research and get the most accurate industry facts.
- The capstone project will be completed on time with quality deliverables.

CONSTRAINTS

- Resistance to change by teams of people from various departments as when implementing new tools or processes like the usage of Microsoft Teams employees may be accustomed to their existing communication methods and may resist the transition to Microsoft Teams.
- The training and educating of new and old personnel may consume a lot of time and resources as some employees may have limited tech proficiency which could further complicate and lengthen the process.
- Technical challenges may produce communication barriers if certain virtual resources have connectivity difficulties, or if staff working from the office experience software malfunction or technical issues; all of this would interrupt communication if not controlled in a timely manner.
- Security and Privacy Concerns come along with a human service organization. Ensuring security and data privacy within Microsoft Teams is crucial and any breaches could have profound consequences. Federal laws related to human services and social welfare.
- Employee retention during the project could increase the time, scope, and budget of the project. This could happen due to a few reasons such as incompatibility of work styles, training, and learning a new process may be a big task to existing personnel especially if they are not tech-savvy.
- Other factors can delay timely submissions as team members have classes, internships and going through job search at the same time and might have conflicts between prioritizing work.

RISKS

RISK	MITIGATION	CONTINGENCY
Regulatory Changes Impacting Project Scope	Regularly monitor the regulatory landscape and engage with legal experts to ensure compliance	Develop contingency plans to adapt to regulatory changes, such as alternative approaches or seeking exemptions
Company-Wide Resource Constraints	Conduct resource capacity planning and allocate resources effectively	Prioritize critical tasks and consider outsourcing or partnering with external organizations if necessary
Competitive Market Dynamics	Conduct thorough fundraising market research	Diversify fundraising strategies and channels
Technological Disruptions or Limitations	Stay updated on emerging technologies and assess their potential impact on the project	Maintain flexibility in project design and consider alternative technologies if needed
Stakeholder Resistance or Lack of Support	Identify key stakeholders and proactively engage them throughout the project lifecycle	Address concerns, communicate project benefits, and seek alignment with stakeholders' interests
Funding And Budget Constraints	Establish a robust fiscal management plan and contingency budget	Explore potential funding sources (grants, partnerships) and secure additional resources if necessary
Organizational Resistance	Implement comprehensive change management strategies	Develop an agile approach to address resistance, like conducting additional training sessions or revising communication plans
Global Events and Disruptions	Monitor global events and create flexibility in project timelines	Develop a crisis response plan to address disruptions (e.g., natural disasters) and minimize project impact
Not completing Capstone paper on time	Scheduling frequent meeting to go through the tasks to be done and setting a deadline ahead of time than final deliverables.	Dividing work equally and brainstorming about the topics together. Staying focussed on the common goal of doing thorough research and getting an “A” for the paper

MEASURES OF SUCCESS

PROJECT OUTCOMES	MEASURE OF SUCCESS
Successful Transition and Achievement of Strategic Goals	Successful operation of nonprofit small businesses in the human services sector that have successfully transitioned to project management-focused structures within the specified time and alignment of project outcomes with their strategic goals.
Improved Project Execution and Efficiency	Organizational and documentation of project completion times, budgets, and quality improvements compared to the pre-transition period via department specific KPIs.
Enhanced Cross-Functional Communication and Tool Utilization	Assess improvements in communication and collaboration among different departments within the organization, along with increased usage and proficiency in project management and communication tools using Microsoft Teams.
Adoption Of Project Management Methodologies Internal Departments	Understanding of implemented project management methodologies (e.g., Agile, Waterfall) as part of their new framework.
Effective Change Management and Reduced Resistance to Change	Assessment of the effectiveness of change management strategies, including successful stakeholder engagement, cultural adaptation, and a decrease in employee resistance to the transition.
Knowledge Sharing and Replicability	Dissemination and use of best practices, case studies, and insights gained during the project among other nonprofit organizations considering a similar transition.
Time Management	Increased efficiency in day-to-day operations within the organization
Professional Development of Project Management Professionals	Training Project Management using Teams from LinkedIn and professional advancement with PMO office.
Post- Implementation	Post implementation we will circulate surveys, have an anonymous suggestion box for feedback gathering, and hold drop-in hours weekly for people to come and help with any challenges they are facing and include them in our Lessons Learned document.
Final Capstone Delivered	Final deliverable submitted on time in APA formatting with adequate number of research and measure of success would be “A” grade in the paper.

Lessons Learned Document

1. *What did we do well?*

- **Timely and quality** submission of the deliverables.
- **Communication** between the team.
- **Supporting** teammates regarding workload.
- Having a Microsoft Teams channel for **project documentation**.
- Doing **thorough research** using available resources.
- Having **frequent meetings** with the instructor (Project mentor) for guidance and reassurance of the work done.
- **Flexible and adaptable environment** amongst the teammates.
- **Motivated** to achieve the common goal.

2. *What can we do better?*

- Having more in-person meetings.
- Conducting more informative interviews with industry experts.
- Getting more PMI certifications in the Project Management Industry.

3. *What still puzzles us?*

- Practical implementation of our project in a non-profit organization and its outcome and results.
- Resulting success, partial success, or failure as the outcome of the project.
- Project Implementation is specific to the organizational structure of any organization.

4. *What would we do again?*

- Project Documentation
- Frequent communication
- Having a realistic timeline for project deliverables.
- Thorough research on the topic
- Having a Project mentor to guide us.
- Use of technology for project efficiency and effectiveness.

5. *What would we not do again?*

- Not having teammates' calendars.
- Having meetings on non-workday.

6. *What would we do differently?*

- Having a fixed meeting time and day weekly.
- Asking the university/ professor for a guest lecture from a non-profit organization.

7. *What have we learned?*

- Project Management using Microsoft Projects through the LinkedIn Learning platform.
- Non-profit organization's organizational structure
- Project Management office establishment
- Change Management Tactics for transition to Project Management environment.
- Clark University Library resources for Project research.
- Presentation Skills through Capstone Workshop.
- Career-related workshop for Resume building, Cover letter building, and interview skills.
- The importance of Capstone in our degree as it gives a platform to showcase the skills that we have learned during our Master's.
- Communication skills
- Leadership Skills
- Time Management
- Collaboration
- Brainstorming
- Microsoft 365

Appendix C- Status Reports

Capstone Status Report 1

Capstone Project Name: The Journey to Project Management: Navigating the Transition from Non-Project Environments

Student Name: Renate Lian Mascarenhas, Shagun Verma, Shrishti Rana

Date: October 4, 2023

Accomplished to date:

1. Project Charter
2. Project Plan Outline
3. Teams Channel is created as a project management tool for documentation, communication, project updates, assigning tasks, due dates, and priority allocation.
4. Attended MSPM 3999 Library Literacy Workshop for our subject matter research.
5. Attended Presentation Workshop Capstone for final Capstone presentation expectations and preparation.

Issues/Concerns:

1. Acquiring information specific to the Non-profit human services industry regarding project management operations.
2. Project management is a very new concept for some of the small organizations so spreading awareness in a broader aspect.
3. Getting mutual availability each week for weekly meetings.
4. Researching internal communication protocol of a Non-profit human services industry.

Plans for the next 30 days:

1. Thorough research from the library and available open sources for resources.
2. Drafting of Research thesis
3. Having internal project meetings weekly for research status and brainstorming sessions.
4. Document project progress in our Microsoft team's channel.
5. Getting a LinkedIn certification in "Managing Projects with Microsoft Teams"
6. Adding learnings to our lessons learned document.
7. Meeting our capstone instructor for 1 or 2 in-person meeting sessions.

Capstone Status Report 2

Capstone Project Name: The Journey to Project Management: Navigating the Transition from Non-Project Environments

Student Name: Renate Lian Mascarenhas, Shagun Verma, Shrishti

Rana Date: November 8th 2023 **Accomplished to date:**

1. Shagun and Renate have completed the LinkedIn Managing Projects with a Microsoft Teams certificate and Shrishti is working on creating a module out of it so, she is halfway through it.
2. Problem Statement
3. Project Plan Outline- The action List and index of things to be done is complete.
4. PMO structure and Change management with the help of PMO
5. Models of Change Management- Lewin's Three-Step and Kotter's Eight-Step Model
6. Project Charter
7. Teams Channel is created as a project management tool for documentation, communication, project updates, assigning tasks, due dates, and priority allocation.
8. Attended MSPM 3999 Library Literacy Workshop for our subject matter research.
9. Attended Presentation Workshop Capstone for final Capstone presentation expectations and preparation.
10. Meeting twice a week as a team.

Issues/Concerns:

1. Acquiring information specific to the Non-profit human services industry regarding project management operations.
2. Project management is a very new concept for some of the small organizations so spreading awareness in a broader aspect.
3. Researching internal communication protocol of a Non-profit human services industry.

Plans for the next 30 days:

1. Thorough research from the library and available open sources for resources.
2. Completing of Research thesis by 17th November 2023.
3. Work on presentation from 20-24th November 2023.
4. Having internal project meetings weekly for research status and brainstorming sessions.
5. Document project progress in our Microsoft team's channel.
6. Adding learnings to our lessons learned document.

7. Find cartoons related to Project management.
8. Study Microsoft Teams and create a module for teaching the PM representatives.
9. Project Plan -
SWOT Analysis, Work breakdown structure, Communication Plan, Stakeholder Plan,
Risk Register and Risk Analysis, Timelines (Milestone)- Gant Chart CHANGE
MANAGEMENT – Milestone, RACI Metrix, Financial Analysis - Microsoft teams licensing
charges depending on teams, PMO established salary and Part-time PM's, Resources
Requirement
 - KPIs of each department
 - Studying internal and external collaboration based on the PM methodology (cross communication)
10. Meeting our capstone instructor for 1 or 2 in-person meeting sessions. One is scheduled on
15th November for Renate and Shrishti

Capstone Status Report 3

Capstone Project Name: The Journey to Project Management: Navigating the Transition from Non-Project Environments

Student Name: Renate Lian Mascarenhas, Shagun Verma, Shrishti Rana

Date: November 29th, 2023

Accomplished to date:

1. Teams Channel is created as a project management tool for documentation, communication, project updates, assigning tasks, due dates, and priority allocation.
2. Project Plan Outline- The action List and index of things to be done is complete.
3. Project Charter updated
4. Status reports submitted
5. Lessons Learned document is completed.
6. All teammates have completed the LinkedIn Managing Projects with a Microsoft Teams certificate.
7. Attended MSPM 3999 Library Literacy Workshop for our subject matter research.
8. Attended Presentation Workshop Capstone for final Capstone presentation expectations and preparation.
9. The final presentation is submitted and reviewed by the instructor.
10. The individual final project deliverables are done.
11. Completed all in-person meetings required with the Capstone Instructor.

Issues/Concerns:

1. Any errors while submitting the final deliverable.
2. Any error during the final presentation.

Plans for the next 30 days:

1. Presentation dry run on November 30, 2023
2. Final presentation on December 6, 2023.
3. Compilation of the final paper with everyone's research and appendix by November 30, 2023.
4. Running final project through Turnitin.
5. Submitting the final paper by December 4, 2023.

MSPM 3999 CAPSTONE RESEARCH

By- Renate Lian Mascarenhas, Shagun Verma, Shrishti Rana

Course- MS Project Management

Semester- FALL 2023



CLARK
UNIVERSITY

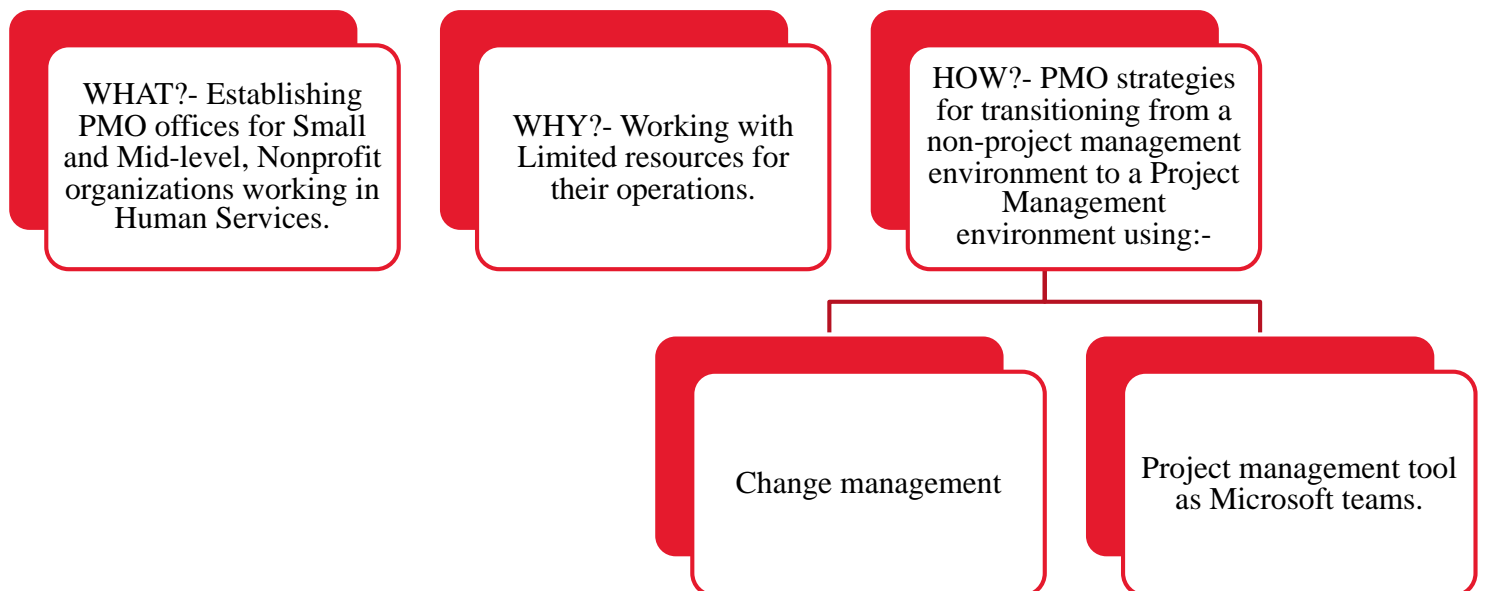
AGENDA

- Introduction
- Project Management Office execution
- Work Breakdown structure
- Change Management Tactics
- Project Management Methodologies
- Artifacts- things we have done in our project
- Post Implementation Plan
- Professional development
- Q&A

The Journey to Project Management: Navigating the Transition from Non-Project Environments

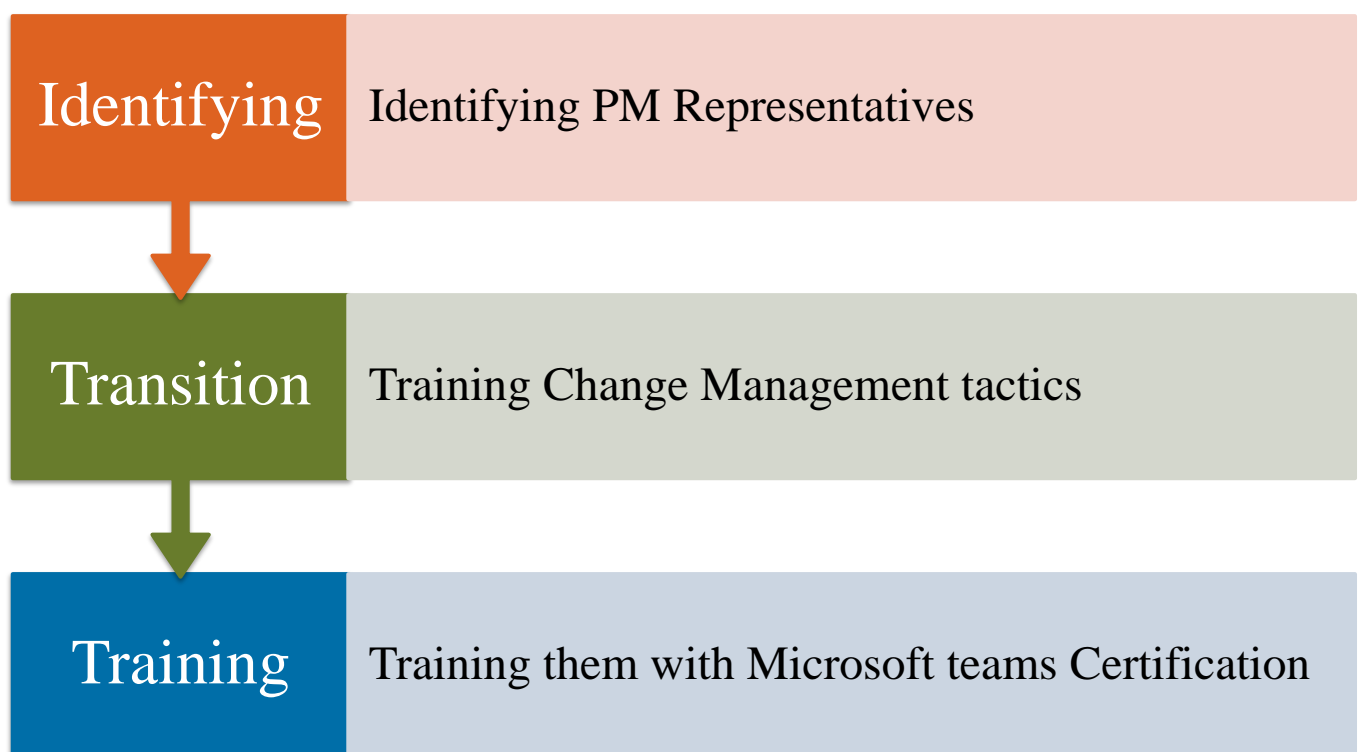


Scope- Small to Mid-level Non-profit organization.



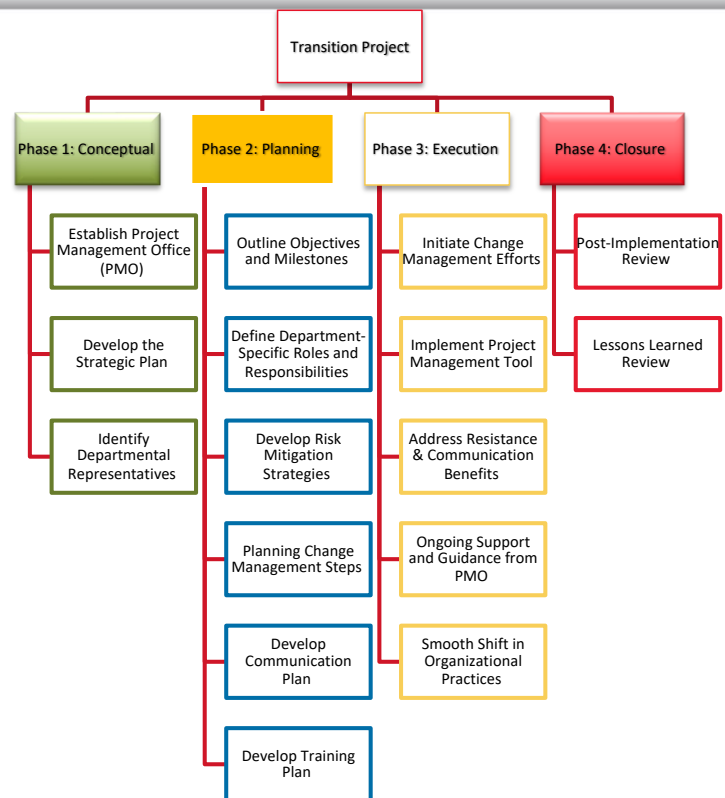
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PROJECT MANAGEMENT OFFICE EXECUTION



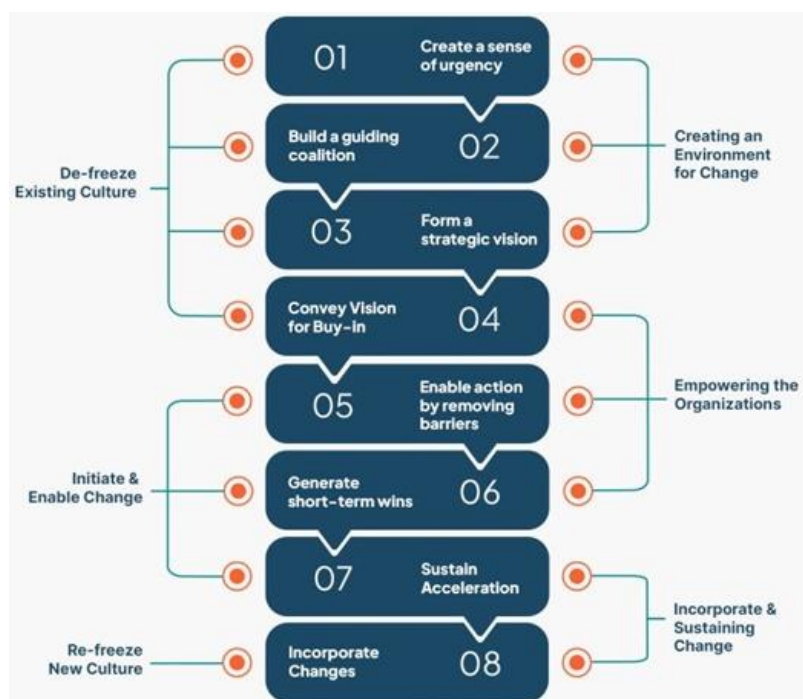
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WORK BREAKDOWN STRUCTURE



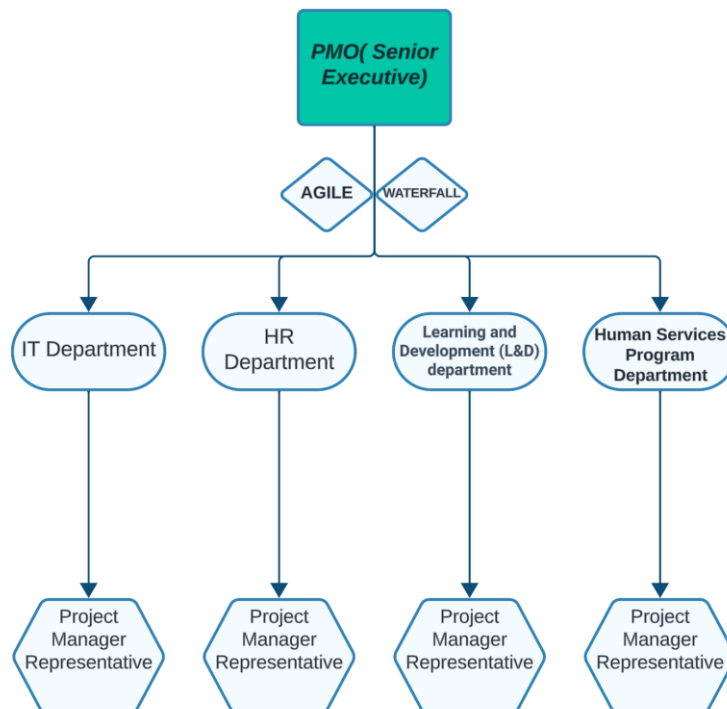
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CHANGE MANAGEMENT TACTICS



6

Project Management Methodologies



7

ARTIFACTS- THINGS WE HAVE DONE IN OUR PROJECT

PMO strategies using Project Management Methodologies

KPIs for departments

Change Management Models for Transition

Characteristics of the Project Management Representative

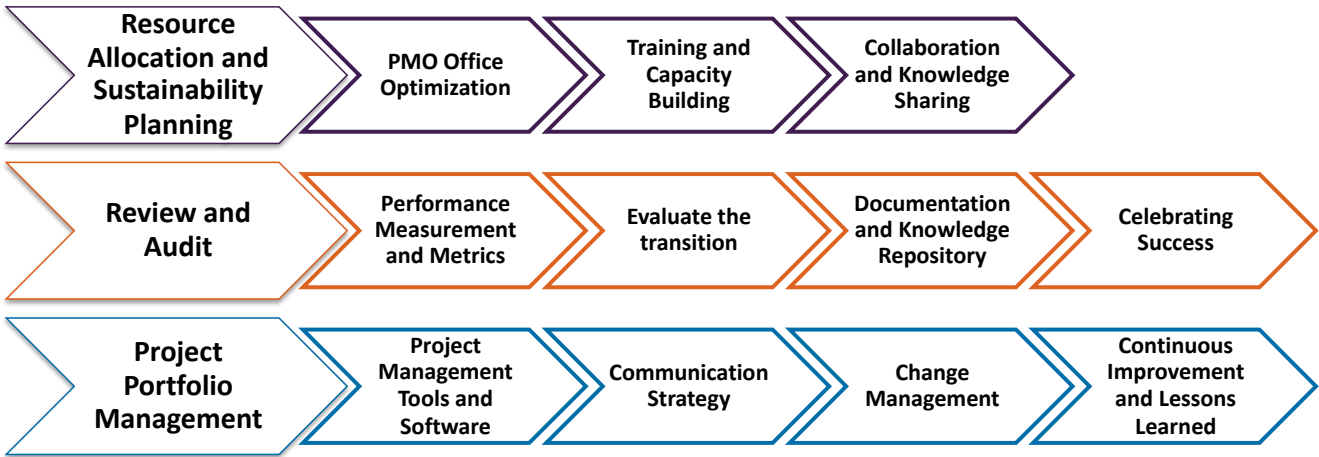
Project Plan

- Characteristics of the Project Management Representative
- Resources Requirement
- Work Breakdown Structure and Gantt Chart
- Communication Plan
- Stakeholder Management Plan
- Risk Register and Risk Analysis
- RACI(responsible, accountable, consulted and informed) matrix
- Financial Analysis

Post Implementation Plan

8

POST IMPLEMENTATION PLAN



9

PROFESSIONAL DEVELOPMENT



LinkedIn learning certification on “Managing Projects with Microsoft Teams”



Thorough research on PMO establishment



Thorough research on Change Management tactics



The paper can be used as a Project Plan for non-profit organizations to establish PMOs with existing and limited resources.

10

Q&A TIME!

By- Renate Lian Mascarenhas,
Shagun Verma, Shrishti Rana
Course- MS Project Management
Semester- FALL 2023



THANK YOU

By- Renate Lian Mascarenhas,
Shagun Verma, Shrishti Rana
Course- MS Project Management
Semester- FALL 2023



LinkedIn

Learning

Managing Projects with Microsoft Teams

Course completed by Renate Mascarenhas

Oct 25, 2023 at 08:36PM UTC • 2 hours 21 minutes

Top skills covered

Microsoft Teams

Project Management

Dan Bodnity

Head of Content Strategy, Learning

PROJECT MANAGEMENT INSTITUTE

20

PMI

23

AUTHORIZED TRAINING PARTNER

Program: PMI® Registered Education Provider

Provider ID: #4101

Activity #: 4101ECEBGH

PDU's/ContactHours: 1.75

Certificate ID:

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THE PMI REGISTERED EDUCATION PROVIDER LOGO IS A REGISTERED MARK OF THE PROJECT MANAGEMENT INSTITUTE, INC.

COURSE

in

COMPLETION

LinkedIn

Learning

Managing Projects with Microsoft Teams

Course completed by Shagun Verma

Oct 24, 2023 at 09:27PM UTC • 2 hours 21 minutes

Top skills covered

Microsoft Teams

Project Management

Dan Bodnity

Head of Content Strategy, Learning

PROJECT MANAGEMENT INSTITUTE

20

PMI

23

AUTHORIZED TRAINING PARTNER

Program: PMI® Registered Education Provider

Provider ID: #4101

Activity #: 4101ECEBGH

PDU's/ContactHours: 1.75

Certificate ID:

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THE PMI REGISTERED EDUCATION PROVIDER LOGO IS A REGISTERED MARK OF THE PROJECT MANAGEMENT INSTITUTE, INC.

COURSE

in

COMPLETION

52



Managing Projects with Microsoft Teams

Course completed by Shrishti Rana
Nov 27, 2023 at 01:32AM UTC • 2 hours 21 minutes

Top skills covered

- Microsoft Teams
- Project Management

Head of Content Strategy, Learning



The PMI Registered Education Provider logo is a registered mark of the Project Management Institute, Inc.

Program: PMI® Registered Education Provider
Provider ID: #4101
Activity #: 4101ECEBQH
PDU's/ContactHours: 1.75
Certificate ID:
53ac5d24a185e4d3dbb14077ea30c71a398b9dc25b0dc441f2d8c8dd48c4a14

