



# Establishing Governance for Project and Service Management

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## Introduction

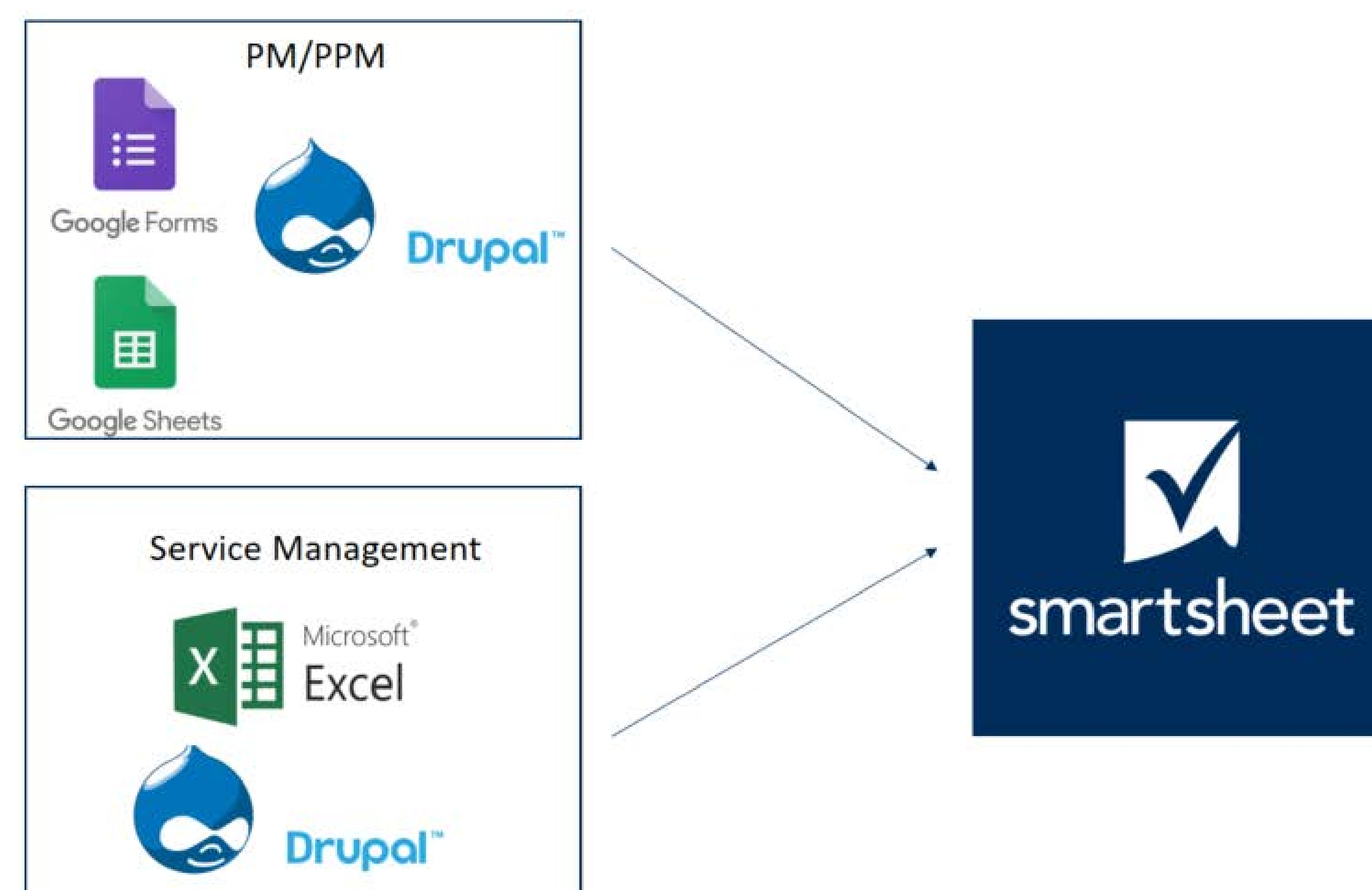
Recently, the Carnegie Mellon University Libraries began to implement a new strategic plan, which greatly increased the number, complexity, and scope of new projects and services sponsored by the Libraries. Historically, initiation, planning, and management of projects and services within Libraries lacked both codified processes and uniform management tools. Libraries' leadership quickly realized that the rapid increase in the size of the unit's project and service footprints had rendered such an unstructured approach to project and service management untenable. In response to leadership's concerns, the Libraries' Digital Strategy team launched an effort to establish a structure of governance around project and service management within the University Libraries. This paper will review the selection process for new project and service portfolio management tools, as well as the effort to define project initiation and management and service transition guidelines, with the intent of providing a framework for establishing project and service management governance in similar organizations.

## Strategic Goals

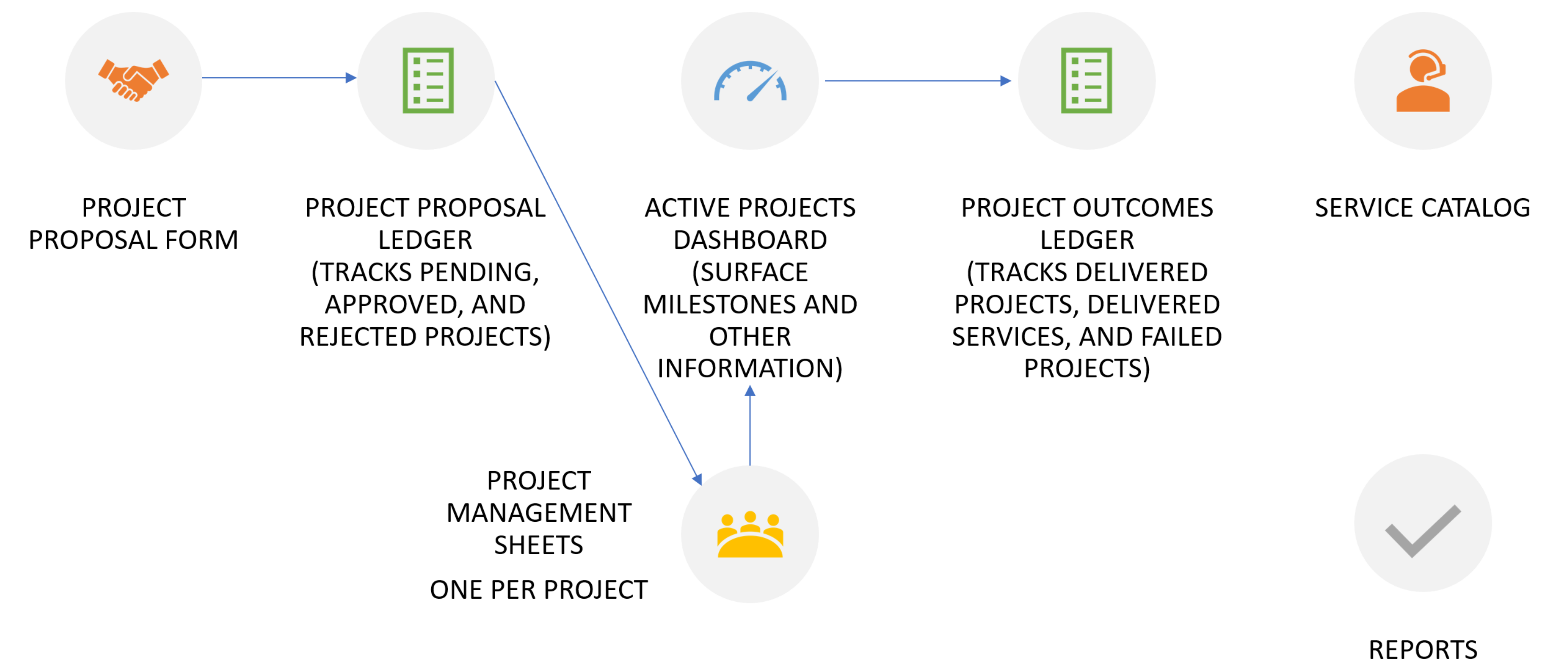
1. Collaborate with peer institutions to provide coordinated access to a global collection of information resources.
2. Steward the evolving scholarly record and champion new forms of scholarly communication.
3. Be recognized globally as a leader in the development of the scholarly information ecosystem.

## Implementation

- Create a "single source of truth" for all CMU Libraries projects and services.
- Re-design Workflow



## New Project Workflow



## Lessons Learned

1. Start with a clean slate, exploring multiple options while acknowledging the organizational limitations or constraints.
2. The tools chosen should facilitate the organization's processes; not the other way around.
3. Document the organization's desired project approval and service transition workflows first, then evaluate each solution candidate against that model.
4. Organizational buy-in is key. Hence, organizational leaders must champion the chosen solution.

## Conclusion

Establishing a framework for project and service management can be a challenging task. First the organization must define project initiation and management and service transition guidelines. Having the proper tools in place helps to ensure organizational success as well. The selection process for new project and service portfolio management tools must be guided by the principal that the tool must fit the organization's project and service management processes. The processes should not be modified to fit the tool. The tool the CMU Libraries selected will help to provide the sufficient structure for project management and service transition that the Libraries need to more efficiently pursue the goals associated with the 2025 strategic recommendation for University Libraries. The process the CMU Libraries used to establish project and service management frameworks and to select a PM/PPM tool can be used to guide similar organizations attempting to formalize project and service portfolio management.