68. Project Management in the Federal Government

Highlights from the 2019 Project Management Symposium

at The University of Maryland

Part 3

Dr. Pamela Misuraca: It brings the community of PMs together to learn and to grow in the field of project management.

Kendall Lott: Wait, hold it. Was that the University of Maryland's Project Management symposium? Yep, here we are again. That was Dr. Pamela Misuraca, one of the attendees at the 2019 symposium – Turning Knowledge into Practice. For our third and last episode from College Park, MD, we will be concentrating on Federal Programs, and Project Management in the Federal Government. You will hear a lot about Compliance. Congressional Mandates. Silos. And of course the infamous jumble of acronym-laden government-speak such as: OMB – Office of Management and Budget; GAO – Government Accounting Office; FAR – Federal Acquisition Regulation; PMIIA – Project Management Improvement Accountability Act; FITARA – Federal Information Technology Acquisition Reform Act. And more!

Todd Archer and Robert Spector talk about leveraging best practices and lessons learned.

Robert Spector: We learn from our mistakes. At NASA, the culture is rooted in the events, everybody knows about. It goes back to the Challenger disaster.

Todd Archer: Someone might tell me like, "Hey Todd, you ever tried it this way?" The first thing I'm thinking is, Alright, that is probably a best practice…but is it germane to the work I'm doing?

KL: Krista Sweet has some interesting things to say about engaging with industry.

Krista Sweet: There's a lot of people that have never worked in the private sector. And they don't know how the private sector works, they don't know how they make decisions or how they operate, so it's kind of hard to go about engaging with them if you're not quite sure.

KL: Jacki Ponti-Lazaruk tackles tolerance and appetite for risk in a federal organization.

Jacki Ponti-Lazaruk: Does Congress ever give you money and tell you, "You need to get to this high-risk community to spend that money," but then as you're issuing that money say, "We will not tolerate any defaults?"

KL: And Latanya Anderson, Scott Hine, Robert McManmon, Bianca Roberson and Tim Whalen tell it like it is – being a real Project or Program Manager in the Federal Government.

Bianca Roberson: There are different restrictions and mandates that we have to live by that when I was in the private sector, I never knew existed.

Tim Whalen: Our job, as project or program managers, as senior people in the government, is to work around the rules in place, and show reality.

Announcer: From the Washington DC chapter of the Project Management Institute, this is PM Point of View®, the podcast that looks at project management from all the angles. Here's your host, Kendal Lott.

KL: There are approximately 2 million fulltime employees with the US Federal Government. When you add Contractors…we are talking at least 10 million people all together. It is a sprawling, diverse, multi-faceted behemoth that, despite the drawbacks, hiccups and obvious shortcomings, does keep on working. And the added tension is that when projects do fail in the government, they are public, notorious and affect a lot of people.

Ah, but when it works, rovers not only tour the surface of Mars, but they tweet and send back pictures. We get our Social Security checks and our tax returns. Data is digitized, new departments are created, systems revamped and new processes implemented. And whether your home organization is government or a contract provider, these things happen due to the diligent efforts of Project and Program Managers.

We'll kick off this episode with what Todd Archer and Robert Spector have to say about Leveraging Lessons Learned and keeping your organization's Best Practices up to date. What I got out of those speakers, besides some particular practices, was the sense that they had moved past lip-service to lessons learned and best practices, and to specific tactics to use and embed these approaches in the work they do. There is alignment and it is pragmatic.

Session MC: The first speaker we have today is Robert Spector. Bob is a Senior Program Manager with NASA's Goddard Space Flight Center, and currently serves as a project integrater with NASA'S Mission Support Future Architecture Program

Robert Spector: At NASA, the culture is rooted in the events that everybody knows about. It goes back to the Challenger disaster. It goes back to some failures with Mars Rovers, and it goes back to of course Columbia, Columbia disaster. The idea was that we learn from our mistakes. So what we came up with, or, actually, what I've distilled here, are some of the principles governing lessons learned. One is that knowledge must flow freely. So what that means is, you can't punish people for sharing information responsibly about what went bad and what could be improved. That has to flow freely. Everybody at NASA should be able to see this information. We promote an environment that fosters continuous learning.

Really, the foundation I think of lessons learned, doing it well, we don't just talk about it at NASA, we really do it. It's part of the culture, it's in everything we do. When I came on board, they said, "Two things you've got to learn, as far as processes." One of those two things is NPR7120.7, that defines project process. At certain key steps it's prescribed that you capture lessons learned. And the second point is Governance.

We have a very strong governance structure. You have to go through a technical review, and then a stage gate review, to make sure the project is following the process to the letter. If you're not, if you're tailoring it, then you have a waiver, signed document. Lessons Learned are part of that, particularly when you're going from planning to execution in your project, you're going to be asked for lessons learned. When you go from execution to operational, at that point, you're going to be

asked for your lessons learned.

You can get a third party. When I was leading the IT PMO, at Goddard, we had people that would do that – go out and basically facilitate what we called a pause and learn session. And what you should come out with were basically: What we did well, of course; what didn't go well and why. And that information was meant to be available to everybody else in our organization and beyond. My group would just put it on the SharePoint site with an index in a spreadsheet, and then all the background information results of these facilitated workshops and Pause & Learn workshops were also in there.

Session Announcer (7:20): Next is Todd Archer. Todd recently joined the Energy Information Administration within the US Department of Energy, joining as a senior analyst and a program and project manager. Prior to that, he has 20 plus years in state or federal government, supporting key strategic initiatives, like process automation enterprise PMO and modernization.

Todd Archer: If anyone asks you, like what would you say a best practice is? Well, it's a procedure accepted as being correct or most effective. So, as someone who's responsible for delivery, I've been a Program/Project Manager most of my career, or led teams that way, you know…we're expected to deliver. And by repeating best practices, that's generally going to get you to that end. There's also an element of compliance and consistency. You know, GAO and IG and some of these folks…they care about your best practices too. It can affect your funding. And then there's always the instance, and I've been part of a lot of organizations, so what happens when that key expert walks out the door? The one person who was so good at this one task, but he didn't do a very good job of embedding best practices across your enterprise.

I think it's important to think about locating them, identifying what a best practice is. Is it staring you right in the face? Does it really apply? Look local.

I know we've talked a lot today about syncing up with communities of practice, which is important, benchmarking with other organizations, studying both private and public sector. But I'm almost positive that every organization has very talented subject matter experts and I think what you need to do is invest in them. Find out what they do really well, because that's probably where you're going to draw most of your best practices from. The flip side of that coin is there's nothing wrong with building relationship capital, right? Showing them that you trust them and that you value them. That's win-win. You get free Best Practices. You get people that are probably more inclined to follow you on your next efforts.

And then again, market research. My pet peeve is I think a lot of organizations do market research when they think they need something. I think market research should be like a program, it should be ongoing. How do you know what's out there, if you're not really investing in it? Simple thing I try to do is I try to budget about 15 to 30 minutes a week, just looking at maybe a new tool, or if I read about a different methodology. Just spend a little bit of time. It's worth that small investment.

Something that I just call Level Up: Bob might be doing something that's a best practice at NASA. To me, the Level Up concept would be that he raises that best practice for his whole team. If that whole team is doing it, maybe the best practices, the whole office or the whole department is doing it. Maybe a level up, if there's a departmental best practice. I think you guys get it, maybe then we're doing it at Enterprise.

Challenge your teams to identify best practices. Empower them. And maybe a quick way of doing this is like saying "Hey guys and gals, what do we do really well, and why do we do these things really well?" I think through that conversation, you're going to identify best practices. Flip side of that coin, "What are some areas that we can do better? Who is doing them better? Maybe we can do some research."

And the other thing is just about alignment. Someone might tell me, "Hey Todd, you ever tried it this way? The first thing I'm thinking is, "Alright, that is probably a best practice. Is it germane to the work am I doing?" And then further down the alignment conversation, "Does it trace back to what my organization is trying to achieve strategically?

To me, organizational adoption is the number one metric for success when you're trying to implement something, whether it be best practices, or Agile life cycle, or PMIIA…things like that. Your organization needs to be able to give people to runway to do it, they have to be authentically invested into this type of thing, they have to be brave enough to experiment, explore. I think one of the things you need to do is recognize your superstars. People that are doing these best practices and being so successful in helping you achieve your company goals…talk about them. What gets rewarded gets repeated.

One thing I can't stand is when best practices and lessons learned are just simply artefacts. They're just in a repository somewhere, that you leave people to go look at when they feel like it. Make it a daily expectation, to kind of make it part of your conversation. I think as leaders, as people of influence, we have to kind of take the bull by the horns and realize that we are responsible for and embedding lessons learned and best practices. Simply saying, "Here's my plan for collecting them and making them available," that's not going to be good enough. It has to be something that you practice.

KL (12:56): Ahah! Now the connection between the government and industry. That interface has its own universe of risks, issues and tension. Talk about alignment, this is where the two worlds come together, in the "contracting" knowledge area. The two worlds definitely use different language, but it's more than that. The language reflects a difference in the underlying thought patterns and world view, in the understanding of risks, incentives, of things that matter. We have a need for a focus on inclusion between the two worlds.

And next we have Krista Sweet: Engaging with Industry for Optimal Project Results.

Session Announcer: Krista has served as the Director of Policy at Homeland Security and Defense Business Council for past 8 years. She's responsible for designing and meeting the Council's advocacery, education, and thought leadership programs on behalf of federal contractors, with the Department of Homeland Security.

Krista Sweet: The Council is an industry association, and we're made up of companies that provide products, technologies and services to the Department of Homeland Security and really across the federal government. My work focuses really on developing and leading programs, between government and industry, that build relationships, create forums for information sharing and really trying to improve the way we conduct business together. And a lot of this really relates to the acquisition process. Our motto is kind of Industry in Support of the Homeland Security mission. And while my job has a homeland security focus, the concepts that I want to talk to about today

really apply across the federal government. So I don't want anyone to think these only apply in a Homeland Security setting, because there's something that's going on everywhere really across the federal government.

The federal government spends about $500 billion on contracts for goods and services. There's obviously an obligation to use that money effectively, and efficiently. Government can't execute, all their core missions and functions by themselves, so it's really critical to get the things that mission owners and operators need into their hands as quickly as possible.

So if communication's done at the right time, in the right form, with the right people with the right information, you really can achieve a lot of different outcomes. Saving time, money, and resources. Really understanding what are all the different things that are possible and trade-offs between different approaches to how you might solve a problem. Understanding what to buy and how to buy it. You know, really, how do you incentivize industry to invest and perform? Overall improving the acquisition process and really at the end of the day, really letting government achieve its mission in whatever department that is.

Why is communication so hard? And despite multiple myth-busting memos, a lot of different efforts that have gone on across the federal government, there's still this kind of unwillingness and fear to want to talk to industry. And I think a lot of people are sometimes surprised when they really realize how permissive the FAR is – not just in permitting, but encouraging engagement with industry. But you always kind of hear a lot of similar things. And the problems are not just governments, here, it's really a fear on both sides, usually always related to... "I'm going to get in trouble." "I shouldn't do this." "It's unethical." "I'm giving someone an unfair advantage." "Someone's going to protest." "I don't want to delay to my program."

A lot of agencies are understaffed. They have time constraints. They're like... I just, I don't have time to go do that or they don't necessarily know how... And one of the big ones, which is something that we'll talk a little bit more about is, there's a lot of people that have never worked in the private sector. They don't know how the private sector works, they don't know how they make decisions or how they operate, so it's kind of hard to go about engaging with them if you're not quite sure how that works. And there's similar problems on the industry side of…a lot of times government will say, "Well I went to talk to industry, but they didn't they didn't really tell me anything."

One of the examples I want to talk about first today was within DHS there is an intelligence and analysis group that were really looking to improve operations and maintenance of their classified IT environment that was used by all their components. They wanted to better understand some of the factors that influenced pricing. How could they improve the quality of service delivery? And also just the overall customer experience.

As some of you, depending on your background, a service level agreement kind defines the level of service that's expected by a customer from a vendor. It lays out metrics that they're going to be measured by, and any penalties or things that might happen if you don't perform.

So they really came into this saying, "I want to understand SLAs from an industry perspective." And normally what they might have done is said, "Maybe we'll issue a request for information within a specific procurement and we'll put that out and ask industry about their business practices."

But instead, the approach they did, I think I was a lot more effective and saved a lot of time and money. They came to us and kind of said... Can you find us six to eight subject matter experts? We're looking for people with direct experience. These are people that work on Service Level Agreements every day. They manage them, they write them, they really understand how these things work. "Bring them to us. We're going to give you in advance some copies of the language that we're proposing for SLAs. We want to have a discussion, and we want to look at how some best practices from other agencies, help us understand how to assess and evolve these Service Level Agreements over time. How do we understand trade-offs? Help us understand industry methodologies. How do you develop, how do you monitor these things? Help us understand how to avoid specific pitfalls. Some of the problems that…we're really frustrated…we keep getting the same result and that's not what we intended.

So what they did was they held a three-hour session, where they had eight government and eight industry, and they talked through this draft language. It wasn't procurement-specific, so there was no perceptions of conflict, there was no sort of... I'm worried it's unfair because I'm meeting these people from industry and not them. The language that was under discussion was going to be commonly used across multiple contracts. They didn't need to budget funds to hold an event or anything like that. But one of the, I think, the best benefits, was really that ability to hear different perspectives. We had people in the room from small companies and some from large and they got to hear where there was disagreement or why maybe a small company approaches that issue differently or has a different business practice related to that.

They were also, I think, the government walked away and they got some really great examples from other agencies like... Oh, you're looking for metrics around this, why don't you go look at what the CIA did? Or you know, some other intel agency, and they could go to contact them to see how that language was drafted. But from an industry perspective, they really appreciated the opportunity just to better understand some of the government's frustrations with Service Level Agreements, as well as an opportunity to kind of share their knowledge and experience. And no one was worried about competitive advantage in that type of environment.

KS (20:00): The next example is intended to show you the importance of timing when it comes to engaging with industry. If done too late, in the process, there's kind of a lost opportunity there. So this was a research and development project with DHS: one of the national labs and another outside organization that was really hired just to help manage and run the project. And they were trying to bring together the key players in the first responder community, and looking at... Let's define a future vision for what clothing, technology support systems…what is the first responder going to look like in 15 years? And then how do we develop those products and services?

So, we were excited when they came to us, as they were planning these industry workshops. And they wanted to get some insights into what some of the industry challenges would be that they should be talking about at the workshops, about commercializing the concepts that they developed as part of a requirements document. And we pointed out a lot of different things that they were going to need to focus on in terms of.. what's the business case? What's the return on investment? How do you incentivize the right parts of industry? Understanding market dynamics, things like that.

But the problem came when the project team did not involve industry in their concepts and requirements document. And so they intended the requirements to be capabilities-based versus sort

of technology-specific. But they technically over-defined the requirements. And what I mean by that is they defined the desired approach to solving a problem versus saying, "This is a problem we're trying to solve, can you give us some different approaches and then we could sort of weigh the cost and benefits of that different approach?" And the example is one of the requirements was a bay slayer shirt, and they wanted that shirt to be able to monitor and transmit location information and health status information, such as heart rate, hydration, body temperature. But what they really did was they defined a solution. You know, a shirt might be one solution, but it's not necessarily the only solution.

There's a lot of clothing companies, or wearable device technologies for amateur athletes, making a lot of similar things in a commercial setting, and if there had been a little bit a better market research up front, they could've realized that they wouldn't have to wait 15 years to address the problem of monitoring health status and location, they would have to do it through a different approach. And so it was a little bit sort of late in the process to have brought industry in, because they could have gotten what they wanted faster and really cheaper. Because one of the things with the industry is it's always easier to incentivize industry to invest in something when there's a commercial market for something or when it's not going to be as much tailoring to what the commercial market looks like.

Does anyone know what a Reverse Industry Day is? Instead of having government get up and tell industry, "Oh, here's our upcoming procurements," things like that, they kind of flipped it and they brought industry up to tell government about the industry perspective of doing business with the federal government – some of the challenges and also just how industry makes decisions, what the process looks like.

Why do they do this? They were looking for a lot of ways to overcome the barriers to communication that we talked about earlier. They wanted to show that they supported engagement with industry, that they were trying to encourage their employees to go out and engage with industry. And there's the fact that there's a lot of people in government that have never worked in the private sector, and just don't know how they operate. And so when you have that information, you really can make decisions in a much different way than you would before. Because the information that's being shared at these type of events, really helps you understand factors that drive risk, factors that drive competition, innovation, that create performance incentives, or create delays perhaps unintentionally, or that increase price.

So the goal is really around providing knowledge that helps the government make better decisions and get better outcomes, all while saving time and money. There's obviously a lot of focus on helping government understand what communication and engagement might look like through the process, and some of the value of that, and kind of like, Why does industry want that information? What do they do with it? And then, how does that come back and impact the government when they have that?

And I guess that's sort of an example. And if you don't understand how industry might interpret your requirements or your evaluation criteria, you may unintentionally dis-incentivize them from doing business with you. If you knew that each page of an RFI response, or an RFP response cost the company $5000, would you ask for a 10-page limit or 50-page limit? You might sort of consider, Do I really need 50 pages? Or do I only need 10? And kind of having information like that really helps you think through the process differently.

These have been kind of some of the frequent topics at events, the hot ones of helping, How does industry make decisions? What are cost drivers? How does the level of engagement and strategy affect price, teaming, delivery? Interpreting requirements. One of the things we always talk about is unintended signals. Sometimes you write an RFI or something, and you think you're asking for something, but then you realize, "Oh when industry sees those words, they don't read it that way. This is how they interpret it, and they do something different."

KL (25:26):And now, addressing one of the most challenging aspects of project management for the federal government, Jacki Ponti-Lazaruk speaks on developing tolerance and appetite for risk in a federal organization. That is not the government's natural tendency.

Session Announcer: Jacki leads the USDA's Rural Development Innovation Center as the Chief Innovation Officer. She has extensive leadership experience across multiple USDA programs and business areas.

Jacki Ponti-Lazaruk: I started my federal career at the FCC, spent 15 years there doing great work on telecommunications, did both international and domestic work, and really got involved in satellite work and rural areas. And that led me to go and run the program of telecommunications and broadband loans and grants at the USDA Rural Utilities Service. We do loans and grants and guarantees and we have over 400 state and local offices. A lot of people to manage, a lot of geographic diversity. We deal with individuals on housing loans, we deal with businesses on business loans and grants, we deal with tribes, we deal with communities, we deal with water and waste Utility Districts, we deal with electric utilities. We manage an over $250 billion loan and grant portfolio. Each year, we add to that about $24 billion.

So we are, I think, the 9th largest bank in the world and we have a terrific, terrific delinquency rate. Overall, the portfolio has a 2% delinquency rate on $250 billion.

We also have a mission, and that is to drive community and rural economic development. It is not a small mission when you're talking about the types of communities, the sizes of the communities, the remoteness of the communities that we deal with. Our goal is to improve their quality of life.

I am the Innovation Officer, I am still the acting Risk Officer as well. And when I was asked to step up into the innovation role, I asked for consideration for the two to be combined. We have a very good and well-established risk program. It's new. We're only a couple of years in, but it is recognized across USDA and across the ERM sphere for the way we're going about doing it and the results that we're getting. And so, I want to share with you some of the lessons we've learned from that today.

Risk and innovation. Do they belong together?

Attendee: Well, the more out on the thin ice of innovation you go, the more risk you're taking, and you don't really know whether it works or doesn't work.

JPL: Right. You have to take risks, to innovate. Can risk tell you where there's opportunity for innovation? Can risk information tell you that? If you're trending the wrong way? Absolutely. So to me, it makes sense. Those of you who work in the federal space, maybe those of you who don't,

know that that sometimes is a hard concept. People get used to things being done a certain way, and thinking about them in certain compartments. And the job, for me, is to break all that down and to think about how we can leverage both sides of that.

I was appointed in November of 2016. There was never a risk officer in all of USDA. I'm the first one in USDA, I'm the first one in rural development and I'm the first one in USDA to stand up an enterprise risk management program. We had 8 people on our original committee. That's it. For an organization of 5000 people, 8 people were tasked with thinking enterprise-wide, and driving information to the Under Secretary on which to make or base decisions.

We've developed a risk taxonomy. We have a process, we have rating criteria. I work with bankers and grants managers. They need process. So we built them a process, and it was great. But from the very beginning, we spent a lot of time on the human component, messaging to people about why they should participate. And that was what was different about our program. We included everyone from the top leadership all the way down to everyone in the staff. Didn't matter. We had webinars, we had different convenings around the country, we gave opportunities for people to provide input. Our risk taxonomy, our rating criteria, every employee had the opportunity to weigh in if they wanted to.

From the very beginning, what I promised my colleagues was, if it didn't produce anything real, we would shut it down and we have produced good and real things.

The digitization project is one of them. And it doesn't sound all that sexy. Records retention. But we did some research, it became one of 43 risks that we looked at in our first year, and we were able to establish through information that there was a severe risk here. It affected the way our programs ran, and how people had access to documents, the mobility of our staff, the safety of our staff. It affected operational activities, it affected our portfolio. If you have loan files dispersed across the country and lots of people have access to them, things can get lost, right? There are procedures in place, the program's been around a long time, but we've grown. The program's grown, the world has grown up around us, and everything is digital and stored centrally, and we are changing the way we are doing business – from a local feel on some back-end operational things to a more secure, more manageable centralized approach.

We also had problems with data quality. Everybody has problems with data quality – naming conventions, data dictionaries. We are an agency that's been around a long time, since the New Deal, and its components we're not all together the whole time. My water program used to be part of Farmers Home, and over time, things got reorganized, data got moved around. Change is constant. And so we are working now to make a big dent in getting our data structured the way it needs to be. And the tools are around now to finally get it to where we want to.

What drives an agency to set appetite and tolerance levels? Inherently, you do it every day, but to document it takes time and to think about it and be deliberate about it takes effort. So Congress can direct us in that lane. Congress sometimes tells us, Here's money, but you can only use it these ways, and you can only have this much failure, right? Sometimes they're very specific. So that's one way. OMB of course gives us a thousand million things to follow. Things that you have to think about as you set your program up, but also as inherently you're looking at appetite in tolerance. And then there are agency directives.

Would setting risk appetite and tolerance be easy and just kind of cookie cutter?

Attendee: Could be.

JPL: So it could be. Except what's the piece that makes it not?

Attendee: People.

JPL: People! You have your own set of core values. Do people stretch a regulation as far as they can? Do they interpret things differently? Yes. So they can alter how that appetite and tolerance gets set. You have various influencers. Does the press matter? You bet. Reputational risk is serious. Does the audits and reviews? Yes. How about Congress? Does Congress ever give you money and tell you, you need to get to this high-risk community to spend that money, but then as you're issuing that money say, "We will not tolerate any defaults." Yup.

So part of the risk officer's job is to find that balance and to have that conversation to get your leadership, whether it's your risk officer, in conjunction with your agency, to be able to sit down with Congress and say "Here's what you're giving us. Here is the appropriate appetite we have for this. If you want us to do this, here's what we need." That's what we're heading towards. Things that are needed to drive successful appetite and tolerance discussions on the left-hand side, right? You see all those things that are more process-driven, very specific: agency and program goals, transparent data and analytics, risk framework. All these things on the right are all those soft things. But without these, without leadership engagement and support, without good communication and trust amongst your leadership team, without you having situational and emotional awareness…It may sound soft, but it can make or break you.

Risk appetite. One of the things we did in our approach was use relatable examples. We used an example of approaching a yellow light in DC. What you would do in that situation, and then added factors in. Is there a traffic camera? What is the dollar limit of the fine? Those kinds of things. We began talking about impact and likelihood, rating it and getting people around the idea of tolerance and appetite.

We broke down our data walls, we built dashboards for them, and now they own them. But guess what? This is my data too. So now we can talk apples to apples. They own it, they use it, they feel comfortable with it. If you set your appetite and tolerance, programs are run better, and by the way, all these dashboards will look better. Congress will have more confidence in you.

Who's this guy? Ron Popeil. Nobody remembers him? Set it and forget it. Can you set and forget an appetite and tolerance level? No, you've got to go back and look at them over time. Because change happens. All these things change. Thank you.

KL (35:19): I recently spoke with John Cable, Founder and Executive Director of the Project Management Center for Excellence at the University of Maryland. I wanted to find out his take-aways from the 2019 symposium. What's new on the agenda for next year? And the prospects for the field of project management in the future. Here are some excerpts from our discussion,

I wanted to ask you if you had any thoughts on the role of project management with the federal government from where you're perched on the edge of the DC environment here.

John Cable: Project management is a really hot topic of interest to the feds because across agencies so many of them are really dealing with project and program management and they're working to continuously try to improve, which is a big challenge in a bureaucratic environment like that.

My team and I have been working with the Community Of Practice, where all the agencies are members of the one group and we've worked with them to attract speakers that are going to speak on topics that are definitely of interest to the federal community: updates to the legislation, program and project management challenges for the federal employees.

KL: How are you feeling about the symposium overall? And what's going to be new next year?

JC: Each year, we've been growing at about 10% in terms of participation. That means the event is really useful to people and that makes us feel good about what we're trying to do, which is to bring all the parties together from across the different government agencies and different industry sectors, with a common interest in the management of projects and to share ideas and listen to the latest research and hear what everybody's doing. This year, we're extremely happy with the lineup. We're going to have a senior executive from Gallup talk about creating positive workplaces. And we've got a senior VP from Clark Construction that is going to share her insights relative to the importance of early engagement with the client. Then we've got a team coming in from the West Coast, and their theme is to redesign project management around the brain. So the more we know about how the brain works, how can we translate that knowledge into better performance of individuals and teams?

KL: Oh, that's Josh Ramirez!

JC: Josh Ramirez and Jodi Wilson are coming in.

KL: Yeah, yeah, so stay tuned, PMS, because that's going to be next month's podcast episode. I went out there in May and interviewed them.

JC: In addition to that, we've got a CEO coming in from the Department of Education and he's going to talk about organizational change. And then our fifth speaker is Ed Hoffman, who used to be at NASA, but he's now retired, and he's a strategic advisor to the CEO at PMI. And his title's going to be navigating the future of project work. And we know that with the tremendous advances in machine learning and AI and technical advances, it's changing the footprint of how we're going to do things in the management of projects.

JC: The day before the symposium begins, we're going to have a day-long work session on PM trainers, working with people that are involved in training project management people, to understand best practices and try to instill some of the best practices that we know about teaching and education into the training environment.

KL: John you buried the lead! That's a big deal, man. You're developing the trainers and coming from an academic institution that is absolutely a sweet spot.

JC: Our launch last year of mastering Agile Project Management Certificate on edX has really been a re-immersion into all of the research that Harvard and MIT do on education, and we're plowing

that into our classrooms, and it's part of that initiative where we wanted to share the learning about the different things to do to communicate an idea, to get hands-on experience with it, etcetera. Right now we're working on launching a whole new 50 courses on edX, so people will be able to, free of charge, enroll and take a course.

KL: Where can they get hold of your program? And also about edX? Can you give us a link?

JC: If you go to our website at pm.umd.edu, there's a link to edX.

KL: And they can find out how to enroll in your program itself. Beyond the symposium.

JC: Absolutely.

KL: So that's the scoop from the top at the Project Management Center for Excellence. The 2020 symposium, will take place on May 7 and 8 at University of Maryland's College Park campus. Sign up now at https://pmsymposium.umd.edu/pm2020/ to get the early bird special.

And now, back to the 2019 symposium.

KL (40:45): In the federal government, the relationship between PMs and contracting officers representatives or CORs is key. Bianca Roberson and Tim Whalen give us an overview of what's involved.

Session Announcer: Bianca is the director of business planning and governance within the US Department of Transportation Office of the Chief Information Officer. She is an Excellence in Government fellow, and has a double Masters, in Business Administration and Community/Regional Planning. Also with us this morning is Tim. Tim currently serves as the Department of Homeland Security's Information Technology Acquisition Career Manager. He assumed this position upon retiring from the US Coastguard in 2011, with over 21 years of progressive IT program manager and operational leadership experience.

Tim Whalen: People have asked me for a long time what it's like being a project manager/program manager or mentoring people and things, and I have said a repeatedly, the most critical role is being a translator, especially as an IT project manager. There are a lot of business people out there that don't speak IT; there are a lot of IT folks that don't speak business. And as a project manager and as a COR, you have to be able to be able to translate that. One of the key roles that we find ourselves in is being able to convey that in terms that the people understand – whether that is conveying the project's needs to a contracting officer, and then the COR stepping in to making sure that those standards are measurable and can be confirmed. Communications is the most key role in being able to communicate differently to the individual audiences, and being able to make sure that they understand each other.

Attendee: Do you actually do a communication plan, wherein you are looking at the members of the group, whether they are for or against, and other characteristics, let's just put it that way. And you communicate with them accordingly?

TW: Either formally or informally, yes. In some cases, for larger programs and things that a written communication plan is often done and implemented. And also things change. Partnerships change.

Goals change. Laws change in the government, that affects that. When I worked for the Domestic Nuclear Detection Office, when I was detailed there, I was the one and only federal employee on the program. Everybody else was either contract support or worked in another organization. So I was managing a matrixed organization program. Developing a communications plan? That was too much pulling on my limited resource time constraint of me as a program office of one to be able to do that. But there were definite rules. I had to follow the rules of the Customs and Border Protection, and state and local government folks. The importance is to know the rules. It may be very beneficial to put them in a formal plan. You may not have the resources to be able to do that.

Bianca Roberson: One of the key skills that I think that a PM should have is to be able to integrate different activities and thoughts. As being able to be that visionary, being able to see, "Okay, this is A, but this is B over there. But what is really that connection?" And being able to make sure that the business requirements are articulated, and that you can have kind of a vision or foresight to say, "Okay, wait, this mandate just changed, or I just saw a draft of some report and directive, and that could possibly impact that requirement or this development of this system or this part of the contract. So there may need to be a potential mod to the contract. Maybe I need to have a conversation with the CEO in advance." So being able to have that risk hat, and I think of risk as being able to integrate all the different areas, the technical and the business aspects of it. That's very key.

TW: In the project and program management role, there's a couple of pitfalls that you find yourself in, and it goes to that translation role, where you have to communicate things in the terms that governance wants to see. People look at things differently. Contracts tend to look at the period of performance and a program may last forever, so people ask their questions in different ways based upon those.

So you have to be able to... to target, re-translate that into the audience that you're working on. because requirements to contracting officer are usually tied to that particular contract. From a program perspective, they're going to last long before that period, of performance. And if you just use the word requirement, it means something completely different, depending on the community that you're talking to.

So that little tap dance, translation is, is once again is the key thing for a Program Manager.

Attendee: On one hand, it's great to say, "Well, you've got these skills, these good cross-functional skills. But my experience in my last three organizations is the silo effect. It's really been a challenge for me in my career, being able to switch back and forth through these profiles and not become siloed in that particular function. This is what you are, and that's all you are kind of thing. I think that somehow those barriers have to be overcome, and it's hard to articulate that at times, when you're dealing with…

BR: Good point.

Attendee: …different opponents…

TW: And I fully recognize that. After the Program Management Accountability Act was passed, Gerry Connolly, one of the congressmen that promoted it, was having a Question and Answer is sponsored by the Washington Post. And I actually asked him, I said, "So now you have the Program

Management Improvement Officer who is going to create great programs across the government. But a couple of years before that you had FITARA that said the CIO was going to creat great programs across the government. And before that, you had the OFPP act that said the Chief Procurement Officers and Chief Acquisition Officers were going to make great programs across the government. So Congress has three different side-load roles that are all kind of basically focused on program improvement.

And he recognized it right off and he said, "Well if we ever want to get anything passed, we can't cross committees. We have different committees that do this, and if we try to involve another committee it's going to double or triple the time to get legislation passed, because that committee's going to have their bite on the legislation." So some of that, congressionally, within the federal government, keeps the silo system in place. Some of our IT systems keep the silo system in place.

How many people only do work in their job series if you're a federal employee? Job series are kind of 1950s-era technology-driven that say, "You're going to specialize in one thing, and that's the only thing you're going to think and do." Reality of the modern world is completely different in that. Our job as project and program managers, as senior people in the government, is to work around the rules in place, and show reality. Because those common goals, that strategy, the big picture, is always there. We just have to work together to meet that.

KL (48:24): And finally, LaTanya Anderson moderates a panel of federal government PMs. We hear from Bianca Roberson, again, with Scott Hine and Robert McManmon. They tackle such topics as the differences between private and public sector, risk management, using an agile approach in government projects, and how to increase the probability of success. That's what we're all here for, right?

LaTanya Anderson: I'm LaTanya Anderson, and I am the Associate Dean of Program Management and Training Delivery of the Department of the Interior's University. And as a real PM of the federal government, I would like to ask you to join me in welcoming our diverse and esteemed panel of real government PMs. So first I'd like to introduce Scott Hine. He's a member of the executive leadership team within the Department of Energy Office of Energy Efficiency and Renewable Energy, where he is the director of the Information Technology Services Office. And then next we have Bianca Roberson, the director of Business Planning and Governance in the US Department of Transportation's Office of the CIO. And lastly but not least, is Rob McManmon. He is the team lead for the Project, Management Office at the Energy Information Administration within the US Department of Energy. He helped build the EIA enterprise PMO from the ground up, over a four-year span, to address agency challenges, delivering on new initiatives.

LA: What do you see as the differences of skills needed to be a PM in federal government versus private industry?

Bianca Roberson: It's really being able to be flexible and understand that there are different restrictions and mandates that we have to live by than when I was in the private sector, I never even knew existed. Not only do we have different mandates as to how we can spend our money – talk about color of the money – when we can spend it, where we can spend it, who we can spend it with from time-to-time…Those are different restrictions that, within the private sector, I didn't experience, and I don't think a lot of PMs have to live by. In addition to that, there are additional stakeholders that I think as a PM within the federal space that you have to learn to love. Such as

GAO and OIG, where their perception and their understanding and their value that they place on your portfolio, your project, is important. And being able to articulate that and continue with that message and make sure that you do the right marketing to ensure that they understand what your portfolio is trying to achieve and how you're achieving it and that you're doing your due diligence with it. And lastly, I think that within the private sector, and the public sector, our ultimate goal can differ. So when I was in the private sector, the dollar, the value, the bottom line, that was what we wanted to make sure that our projects were successful, and made the most money, and had the widest spread, and people were buying into it. But within the government, our mission is different. And so it may not be the most economical or may not be the cheapest product, but it provides the best value to help the American people.

Scott Hine: My belief would be, certainly, in addition to what Bianca mentioned, is ownership, and looking at the bigger enterprise and how a particular project fits in, as opposed to perhaps private-sector folks that might go from project to project, from different client to different client. There's more of a start and a stop, as opposed to within the federal government, we have projects that go on for a long time. Again, we're not for-profit, and it's more about doing the right thing for the greater good. Sometimes you have to spend a little bit more money, be a little bit more bureaucratic, but it's better perhaps, big picture, for whatever reason. So I think it's ownership and long-term stewardship as opposed to perhaps in private sector, it's jumping from one to another.

LA: How is Agile impacting project and portfolio management in the federal government, and is its impact only on federal PMs of IT projects or programs? Or beneficial to managers of any federal project or program?

BR: One, I think when it is plausible and feasible, and you actually have the support to actually really do that Agile or iterative development, then it's great. I don't believe that every federal project or program can support iterative or Agile or Scrum. I say that because I think that our infrastructure, our structure internally, is different from the private sector. I don't know about you all, but my PD and my work as well as everyone on my team, there's that other line that says "Other duties as assigned."And because of that, that means that I manage my schedule the best that I can. Time management. But I am not able to be there at a daily stand-up. I can't.

Attendee: What do you think the key levers might be to help us in, say, federal government, to increase the probability of success for our projects? Whether they're large or small.

BR: Having a successful portfolio in my opinion is having a successful risk management process and understanding across the department or across your organization. I think if you actually employ risk management strategies and methodology, then you have available data so you can have data-driven business decisions, you understand what that data is, you understand who needs to receive that information, that communication, as well as you're able to connect the dots. You're able to look at the larger picture.

SH: It is to me all about Change Management. You can have, from a project management standpoint, you can meet cost, schedule and scope. You can meet all of your deliverables. But if your organization's culture is not ready to adopt it and embrace it and to use it, it's a failure. Change Management actually starts before project initiation. When you have an understanding of what a project concept might be, but before you actually start off the project, you have to start engaging your organization to figure out how best you can actually deploy this and engage your community

all the way up through executing, controlling, and then closing out the project. Otherwise, in my mind, that's the leading cause of project failure other than the obvious of missing major milestones.

Because I think too many times, from a parochial standpoint, from an academic standpoint, PMs think about cost, schedule and scope, and they disregard the human element, which is actually, "I've never done it this way." "I'm a long-time fed. I've been doing this for 30 years." "Who's new millennial come in and tell me how to change my business process? I'm not going to do it." "I don't know how to use automation." "I don't want to do X, Y, or Z." "I'm not going to do business intelligence and business analytics, I don't want to push a button and just have a report come out. I want to use my mind." This to me is the biggest part of project failure or success.

Attendee: Get it off your chest!

[Laughter]

LA: So we have people who are retiring in the federal government, we have millennials coming into the federal government, we have new people to the DC area, and we also have those mid-career people, who are kind of sandwiched in between. What do you think the impact of a multi-generational workforce is on the recruitment and and retention of PMs in the federal government?

SH: I think it's a great opportunity to actually prepare for and be part of your succession plan. We've done a little bit of this in the past in a different role I've had, where we've had some more senior folks that have been around, but then we also, if we were hiring some junior folks right out of school, or Presidential Management fellows, we had former fellows, that have gone through the process, we had them participate in the process as well. Because they look at things differently. They perhaps might hear a question or an answer to a question different than someone who's been in the government a little bit longer. So it's a great opportunity to actually infuse additional talent on the front end in terms of folks coming onboard, but also during the interview and hiring process.

BR: For the hiring we have to be a little bit different than we have in the past, meaning we are really, especially on the technical side, on architecture side, and so forth, we are really having to compete with the private industry. And we can't necessarily compete with the dollars, but there's other ways that we are trying to support hiring, especially those who are directly out of college, that have their skills are certainly up to par, they've been doing it more frequently than some of us. So we're being creative with or our practices. And I just wanted to say this week alone, we are actually participating in cyber coding challenge. So that's one of the ways where folks are able to learn about getting in with our agency.

LA: So I want to thank the panel, thank you.

KL: For those of you who are not working in the federal government space, I hope this episode gave you a taste of what it's like…of what our PM cohort confronts regularly. For those of you who are already there…well maybe you learned some things about what's happening in other agencies and other departments, and some new techniques. There is a lot going on, and plenty of opportunities to do challenging work that has high impact.

JKL: Special thanks to all the presenters in this episode: Todd Archer & Robert Spector; Krista Sweet; Jacki Ponti-Lazaruk; LaTanya Anderson, Scott Hine, Robert McManmon, Bianca Roberson,

and Tim Whalen

I would also like to thank the recordists, Marci Owens, Felicity Keeley, and Prusha Hassan. And most of all, I would like to thank John Cable and his team at the University of Maryland's Project Management Center for Excellence, for making this all possible.

Announcer: Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Feldman, Rich Greenblatt, Lionel Lyles, and Hiroaki Honshuku. Post production performed at M Powered Strategies.

KL: PMPs who've listened through this complete podcast may submit a PDU claim, 1 PDU in the talent triangle Strategic, with the Project Management Institute's CCR system. Use provider code 4634 and the title PMPOV0068 Project Management in the Federal Government. Or just use the PDU claim code 4634PDT97I.

And remember to tune in to next month's episode on project management in neuroscience with Josh Ramirez, Dr. Jodi Wilson and Carole Osterweil.

Josh Ramirez: You would go and re-design project management process based on human factors, and based on the science behind it, to improve performance,

Jodi Wilson: Because our attention spans tend to be more of those short blips, the short meeting sessions where you're talking about, "This is what I have accomplished, this is what's on my to-do list, this is what I will have accomplished by the end of the day," function more the way that the brain actually functions.

KL: Yeah, it turns out not all our behavior is in our training.

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Announcer: This has been a Final Milestone Production, sponsored by M Powered Strategies.