

UNIVERSIDAD PARA LA COOPERACION INTERNACIONAL  
(UCI)

DEVELOPMENT OF A PROJECT MANAGEMENT OFFICE (PMO) FOR THE BELIZE  
TRADE AND INVESTMENT DEVELOPMENT SERVICE

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This Final Graduation Project was approved by the University as  
partial fulfillment of the requirements to opt for the  
Master in Project Management (MPM) Degree

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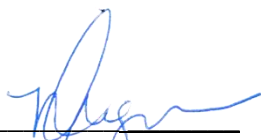
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## **DEDICATION**

This research is dedicated to my daughter, Chelsea who has encouraged me to keep pursuing my studies even when it is challenging some days.

Also dedicated to my coworkers who have worked tirelessly to get projects done without the resources that they need. Yet they remain committed to the organization and the people that we serve.

## **ACKNOWLEDGMENTS**

I would like to first and foremost give thanks to God for being the guidance that we all need to make it through this life.

Thanks to my friends, family and coworkers that have stood beside me and pushed me to be a better version of myself

Thanks to the professors of UCI whose knowledge and patience have allowed me to attain a degree that will bring tremendous benefit to my life.

## ABSTRACT

The goal of this FGP document is to develop a proposal for a Project Management Office (PMO) within the Belize Trade and Investment Development Center (BELTRAIDE). Following the guidelines provided by the Project Management Book of Knowledge (PMBOK), the PMO will be instrumental in improving the outputs of projects assigned to the organization through the development of better processes and structure.

A key deliverable of this project in the implementation plan on which the PMO will be developed which includes the identification on proper human resources inclusive of their roles and responsibilities, the development of the procedures and processes, inclusive of a communication plan and risk management processes etc., and the necessary training and workshops for PMO staff.

The FGP also complies with regenerative and sustainable development and addresses how the potential PMO will be an instrumental champion in this field. The GPM P5 and the SDGs will be a key part of project success for the organization and country.

**Key words:** Project Management Office, BELTRAIDE, PMO, Maturity Analysis, Implementation, Green Project Management, P5, Sustainable Development Goals

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## **ABBREVIATIONS AND ACRONYMS**

- 5Cs: Caribbean Community Climate Change Center
- BELTRAIDE: Belize Trade and Investment Development Service
- FGP: Final Graduation Project
- GOB: Government of Belize
- GPM: Green Project Management
- MREF: Monitoring, Reporting and Evaluation Framework
- MSME: Micro, Small and Medium Enterprises
- OPM3: Organizational Project Management Maturity Model
- PMBOK: Project Management Book of Knowledge
- PMI: Project Management Institute
- PMO: Project Management Office
- PMP: Project Management Professional
- SDG: Sustainable Development Goals
- SIB: Statistical Institute of Belize

## **EXECUTIVE SUMMARY**

The Belize Trade and Investment Development Service (BELTRAIDE) is a statutory body under the Office of the Prime Minister and the Ministry of Finance, Economic Development and Investment. BELTRAIDE's key mandate is focused on four core areas small business development, professional development, exports, and investments whose work are executed by four main units. To support the work of these core technical units, BELTRAIDE has the Marketing and Communication Unit and the Project Unit. Both the units are short staffed considering they are responsible to support the technical units that combined have over 30 staff.

A key aim of the current government who is now one and a half year in is to find more projects that support MSMEs through funding from international agencies. Many of these agencies including the IDB, UNDP, and the Embassy of the Republic of China (Taiwan) already use BELTRAIDE to execute projects but with limited staff, some of the projects have not been executed successfully. The challenge for the organization is that not only does it not have enough staff within the Projects Unit but also that the projects have not been completed in a timely manner. Additionally, there were several complaints from stakeholders on the incomplete scope of work not meeting their expectations.

The FGP provided a basis for why the implementation of a Project Management Office (PMO) will ensure successful execution of projects including the benefits that can be realized with a PMO especially client satisfaction and attaining the GOB's mandate under Plan Belize. It helped to answer how the Government of Belize (GOB) can benefit from a PMO through BELTRAIDE's office that does work in the specific areas that are important to the government including trade, investments, and business development.

To accomplish this mission the objective of the FGP focused on developing a plan for a Project Management Office (PMO) within BELTRAIDE that will ensure the successful execution of the Government of Belize's projects in investments, trade and Micro, Small, and Medium Enterprises (MSMEs) development. For this objective to be achieved, there are several specific steps the FGP conveyed including conducting a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, developing an Implementation plan and Project Management Manual for BELTRAIDE, developing an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards and recruiting and training ideal personnel.

The FGP assisted in conducting the research necessary for the GOB to make the best decisions via projects that will affect the economic, social, and political spheres of the country. For the specific objectives, the FGP identified the best methodology to gather data including the primary and secondary information sources such as interviews and textbooks, the descriptive analytical and quantitative research methods that will be employed, the tools needed to gather information such as questionnaires, market research and charts, the assumptions and constraints of accomplishing the FGP and the overall PMO, and the expected of the project.

The FGP concluded that there are significant benefits to the implementation of a PMO at BELTRAIDE, however, there needs to be several changes that must occur in order to successfully onboard the office. Particularly, the maturity analysis, inclusive of a gap analysis not only identified challenges in physically spacing at the organization but also human resource challenges which would pose significant risks to the prospective PMO. Notably, it is imperative that competent staff be hired to complete the PMO and their place within the organizational structure must be clearly understood and articulated to the entire staff.

It is recommended that to start the implementation of the PMO that there is clear communication with the Board of Director on the importance of the office and its scope inclusive of authority. Along with this, there is the need for the development of clear policies and guidelines on the processes that will be used by the organization and how reporting will be done on the programs and projects that are being led by BELTRAIDE.

Guided by the FGP, BELTRAIDE and in extension, the Government of Belize will be able to implement a Project Management Office that will be able to meet organizational goals, fulfill the GOB's mandate, and satisfy the stakeholders needs and requirements thereby improving the organization's reputation.

## **1 INTRODUCTION**

### **1.1. Background**

The importance of a project management office (PMO) with an organization cannot be understated and the PMI (2017) considers its existence necessary “to shepherd business value throughout the organization” to help its projects achieve their goals. Since the inception of BELTRAIDE, the organization has been leading various initiatives for the Government of Belize as its statutory body responsible for investments and enterprise development. The competence of the organization has attracted several funding agencies to use BELTRAIDE as a lead project executioner.

The PMO at BELTRAIDE will serve as the GOB’s PMO when it comes to investments, trade and entrepreneurial development which are key to the government’s plan. A full team office will ensure that the country benefits from the numerous funding opportunities that are available from international partners and that they are able to then assist in the social and economic development of the country. Most importantly, by employing project managers with Green Project Management Certification will ensure that they are adhering to the SDGs which is important to the Plan Belize Manifesto.

What is needed within the organization is a proper management structure that standardizes the project-related governance processes and facilitates the sharing of resource methodologies, tools, and techniques. To achieve this objective, this FGP will gauge whether the organization does in fact need the PMO to accomplish its mission. While there have been several challenges when it comes to the successful execution of some projects, the

organization has performed relatively well given the absence of human resources in the Projects Unit.

### **1.2. Statement of the problem**

The Government of Belize has placed significant responsibility on BELTRAIDE to be the institution that leads projects for enterprise and economic development. Notwithstanding the willingness of the organization to take on the work, they lack the human resources to successfully fulfill the commitment of the GOB. The organization is short staffed leading to some projects not being completed on time or to the scope of the funding partners. With the addition of a fully staffed PMO, the organization will be able to effectively contribute to the mandate of the Government.

### **1.3. Purpose**

The FGP will determine whether a PMO should be implemented at BELTRAIDE through research of the systems currently in place and what will be needed to successfully implement one. The research will uncover why certain challenges persist in the Projects Unit including responding to why:

- Projects are often delivered later than promised or not within budget
- Stakeholders complain about project delivery or incomplete scope of work
- Stakeholder expectations are not formally managed and are often misunderstood
- Skilled human resources are not available within the organization

This FGP research will indicate that with the implementation of the PMO, several benefits can be delivered including according to Merla (2005):

- Adequate human resources to successfully complete work
- An improvement in meeting project scope objectives and client satisfaction
- An alignment of projects with the strategic objectives of the Government of Belize

#### **1.4. General objective**

To develop a Project Management Office (PMO) within BELTRAIDE that will ensure the successful execution of the Government of Belize's projects in investments, trade and Micro, Small, and Medium Enterprises (MSMEs) development.

#### **1.5. Specific objectives**

1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.
2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.
3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)

4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.
5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual
6. To recruit ideal personnel (where necessary) and train and sensitize existing staff on the new institutionalized project management system and associated procedures (i.e., training manual, procurement manual, fiduciary policies, etc.)
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.



## 2 THEORETICAL FRAMEWORK

The BELTRAIDE serves as Belize’s national Investment Promotion Agency, and Export and Trade Promotion Agency, and is focused on Micro, Small and Medium Enterprise (MSME) Development, Innovation, Entrepreneurship, and delivery of industry specific training. These functions are carried out by the four sub-units of BELTRAIDE namely: (1) BelizeINVEST, (2) EXPORTBelize, (3) Small Business Development Centre (SBDCBelize), and (4) Belize Training and Employment Centre (BTEC). The administrative and corporate functions are also complemented by the Marketing and Information Unit, a Projects Unit, an Information Technology Unit, a Finance Unit as well as Administration and Human Resources.

**Figure 1**  
**BELTRAIDE Strategic Areas**



Note: This figure shows the four technical areas of BELTRAIDE and their interconnectivity to the organization’s mission. This figure was sourced from BELTRAIDE’s website.

The Projects Unit of BELTRAIDE will be the main unit in which this research will be carried out. The goal is to look at the systems in place in the procurement of projects and measure how impactful they are to the organization. Additionally, the research will determine the need to integrate sustainability into the Projects Unit/ Project Management Office. This integration is key as studies have shown that “the integration of sustainability into project management and sustainable project management is considered one of the most important global project management trends today” (Silvius, 2021).

## **2.1 Company/Enterprise framework**

### **2.1.1 Company/Enterprise background**

The Belize Trade & Investment Development Service (BELTRAIDE) was launched in the year 1999 as the Trade and Investment Promotion Service (TIPS), which was mandated to provide only two functions: 1) Investment Promotion and Trade Promotion. By 2000, BELTRAIDE was providing business facilitation under the Government’s fiscal incentives program and providing a “one-stop-shop” service to local and foreign investors.

In the year 2005, the Enterprise Development function was assigned to BELTRAIDE; and in 2007 the SME Development Unit came online for the first time. However, by 2011 BELTRAIDE needed to be reorganized to better serve the business community. By late 2011, the investment promotion functions were completely redesigned and deployed as the new BelizeINVEST unit, tasked with investment promotion, attraction, and generation. This unit

complemented the already existing Business & Investment Facilitation Unit, which focused on investment aftercare and administering GOB's Fiscal Incentives program and later in 2013 the Export Processing Zone (EPZ) program.

The next technical function to be redesigned was enterprise development. In October 2012 the Small Business Development Centre Belize (SBDCBelize) came online, with technical assistance from the University of Texas at San Antonio. The year 2012 saw the creation of three sub-units: 1) Events Planning and Public Relations (E&PR), 2) Projects, and 3) Research, which all provide corporate support services to the technical units. The E&PR sub-unit is tasked to brand BELTRAIDE and increase public awareness to the public and to our stakeholders and coordinate all events by the organization. The Projects sub-unit allowed for all projects to be centrally administered, to increase coordination, implementation, and monitoring and evaluation, while the Research sub-unit provide research support.

In May 2014, the trade and export functions were brought back online under the new unit brand of EXPORTBelize. The most recent family member has been the Belize Training & Employment Centre (BTEC) which provides demand-based fast-track employment training to aid the closing of the gap between employer needs and employees' skill sets.

To date BELTRAIDE continues to provide support in these technical areas and also focus on garnering funding for projects that support their mandate.

### **2.1.2 Mission and vision statements**

**Mission:**

Design a PMO that enables and facilitates innovative and competitive business development by paving new paths, utilizing technology, critical alliances and aggressively promoting investment. (BELTRAIDE, 2021)

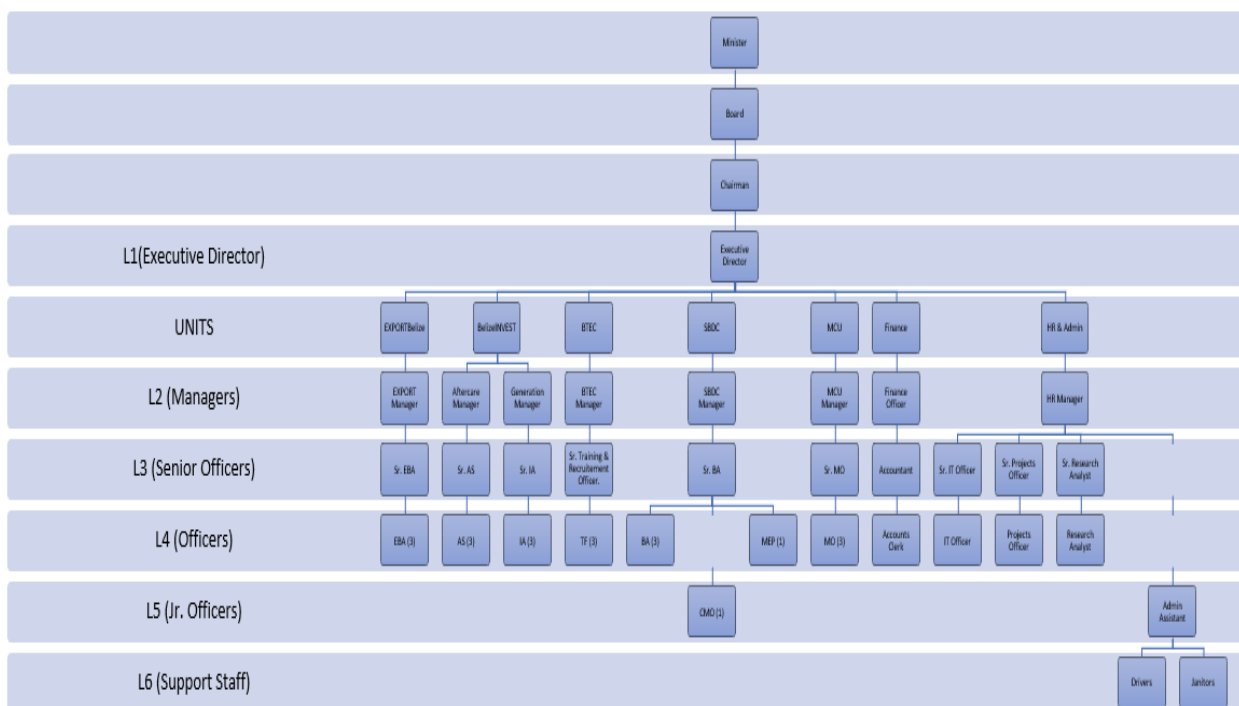
**Vision:**

BELTRAIDE: the portal for project management that contributes to the sustainable, socio-economic development of Belize. (BELTRAIDE, 2021)

### **2.1.3 Organizational structure**

The BELTRAIDE organizational structure is headed by the Minister with responsibility for Investment who is the current Prime Minister of Belize, John Briceno. Within the structure there are the four technical units (BelizeINVEST, EXPORTBelize, SBDCBelize and BTEC) that are supported by other units inclusive of the Project Unit. As is the Projects Unit does not have a manager and the goal of the FGP is to integrate the PMO into the structure of BELTRAIDE. Figure 24 indicates what the proposed new organizational structure would be with the PMO.

**Figure 2**  
**BELTRAIDE's Organizational Structure**



*Note.* The figure shows BELTRAIDE's current organizational structure as reflected in its 2020-2025 Strategic Plan.

The new organizational structure will include the addition of the Project Management Office and the staff required.

### 2.1.4 Products Offered

BELTRAIDE was established by the BELTRAIDE Act, Chapter 282 of the Laws of Belize on March 18th, 2000. Based on the Act, BELTRAIDE maintains fifteen legally mandated functions:

1. Giving advice and tendering recommendations to the Minister on the formulation of appropriate policies and projects to guide trade and investment promotion activities. This will be in line with the environmental and Social Management policy.
2. Designing and assisting in the implementation of export promotion programs, particularly for Belizeans and non-traditional export products;
3. Liaising with relevant stakeholders under the Designated Processing Area (DPA) and the Commercial Free Zone Act, in the promotion of local and foreign investments in Belize;
4. Implementing multilateral and bilateral loan-assisted projects for the development of medium and small enterprises in line with fiduciary policies;
5. Collecting, storing and disseminating, on a continuous basis, reliable and timely information and trends in international trade and investment; and
6. Undertaking publicity campaigns on programs to promote Belizean products in the international markets; Both in line with training and sensitization activities; and finally
7. Establishing and maintaining a register of exporters, importers, investors and other relevant partners in trade. For the regular supply of trade and market information which sets clear guidelines for processes.

## **2.2 Project Management concepts**

The following concepts are frequent lexicons that are used in project management and will be integral to the development of the FGP.

### **2.2.1 Project**

PMI defines a project as “a temporary endeavor undertaken to create a unique product, service, or result” (PMI, 2017). Within the project there is a goal that set out what the aim of the project is inclusive of objectives that will also set out wat the constraints on how the project will be delivered to be successful. Objectives usually capture elements such as time, cost and quality.

Closely related, APM (n.d.) defines a project “a unique, transient endeavor, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes or benefits”. In addition, a project should have: clearly identified stakeholders, activities, management plan and financing or procurement arrangements inclusive of a monitoring and evaluation system; and an appropriate level of financial and economic analysis, which indicates clear cost-benefit ratio. A project is usually deemed to be a success if it achieves the objectives according to their acceptance criteria, within an agreed timescale and budget.

### **2.2.2 Project Management**

While a project includes the collaboration to achieve a single well-defined objective, project management is seen as the process undertaken to achieve the organizational objective. This process typically falls into five groups: initiating, planning, executing, monitoring, and controlling, and closing. Though project management has been around for centuries as we have seen in the design of world wonders including the Pyramids of Giza, it was not until 1969 that discussion to formalize the practice began.

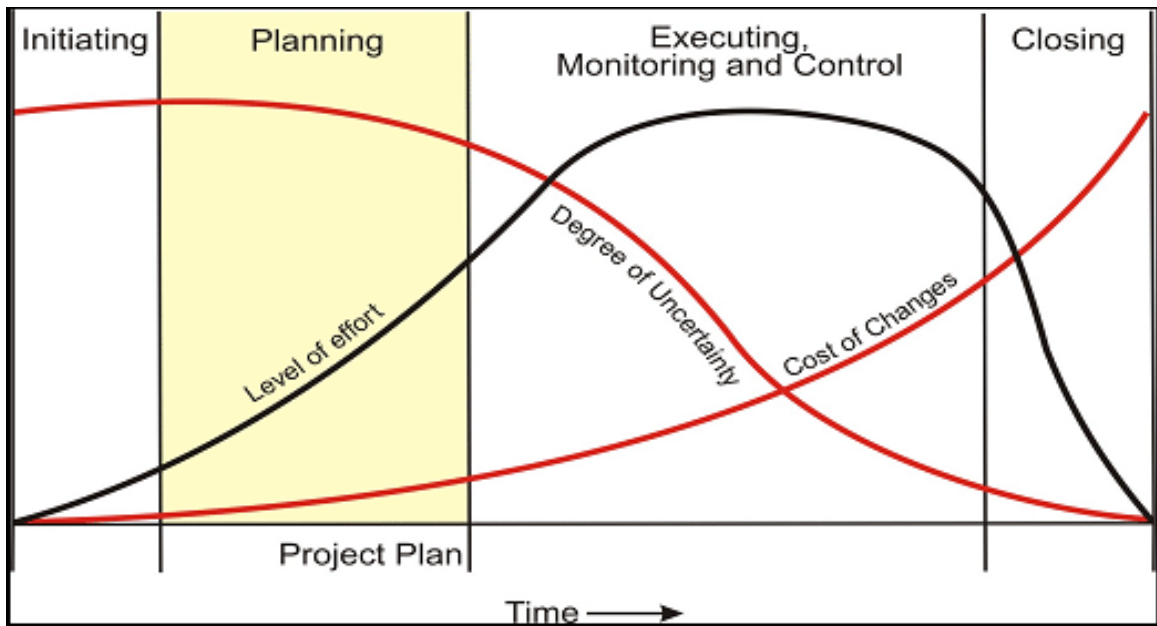
Throughout this time, the Project Management Institute, the largest institute for project management has continued to “foster recognition of the need for professionalism in project management; provide a forum for free exchange of projects management problems, solutions and applications, coordinate industrial and academic research efforts; develop common terminology and techniques to improve communications” (Weber, 2018) and much more. These terminologies are an important part of project management common vocabulary that is used in this discipline. According to the PMBOK), “The PMI Lexicon of Project Management Terms provides the foundational professional vocabulary that can be consistently used by organizations, portfolio, program and project managers and other project stakeholders” (PMI 2017).

### **2.2.3 Project life cycle**

The series of phases from initiation to closing that a project passes through from its start to its completion. For the Project Management Office, these stages within the lifecycle are important as they help to ensure that that the timeline is being kept.



Figure 3  
Project Life Cycle



*Note.* The figure shows the lifecycle of a project from inception to closing. This figure was retrieved from the Project Management Institute (PMI), 2013.

#### 2.2.4 Project management processes

According to the PMI (2017), the Project Management Processes are often defined by the activities they include such as:

“Initiation— The start of a project which may include a preliminary scope statement detailing what exactly the project is expected to deliver.

Planning — Planning begins with the outputs of initiation (charter, preliminary scope statement, and project manager). At the end of planning, the entire project has been thought through: what will be done; how; in what order; and at what cost.

Execution —Executing is the act of doing what it says to do in the plan. It is completed when all the work is completed.

Controlling — Controlling is the act of making sure that the work being executed complies with the plan and is complete when it meets the prescribed quality standards defined in the plan and are accepted by the customer.

Closing — Taking stock of what was learned throughout the project and documenting for reference on future projects. It involves making sure that all the necessary paperwork is completed in terms of contract administration and sign off.”

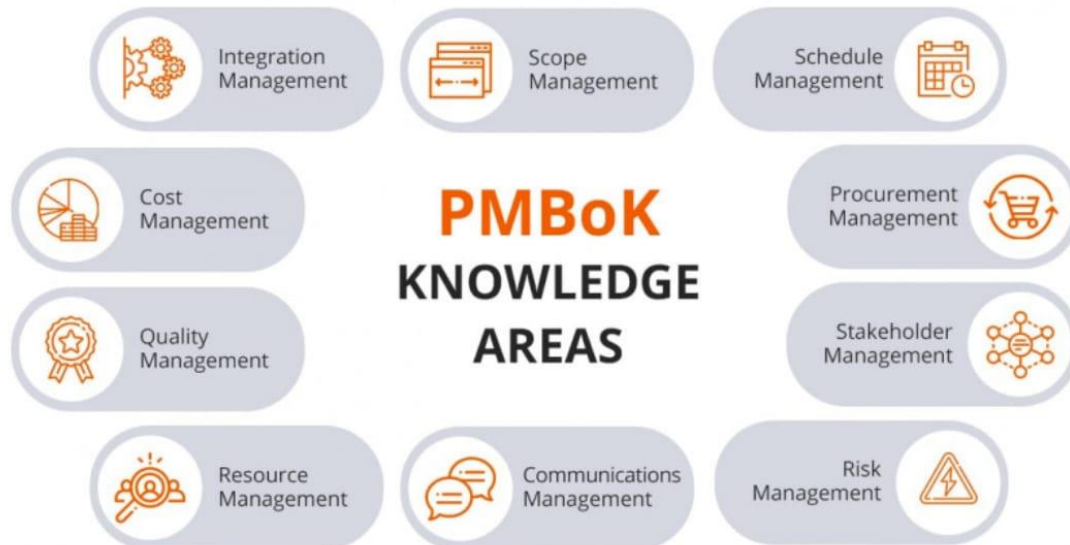
**Figure 4 Project Management Processes**



*Note.* Retrieved from a later version of the PMBOK, 2017, the figure shows a further expanded project lifecycle inclusive of the project management processes.

## 2.2.5 Project management knowledge areas

Figure 5  
Project Management Knowledge Areas



*Note.* The figure shows the ten knowledge areas of the Project Management that will be used throughout the document and retrieved from the PMBOK, 2017.

**Figure 6**  
**Project Management Knowledge Areas**

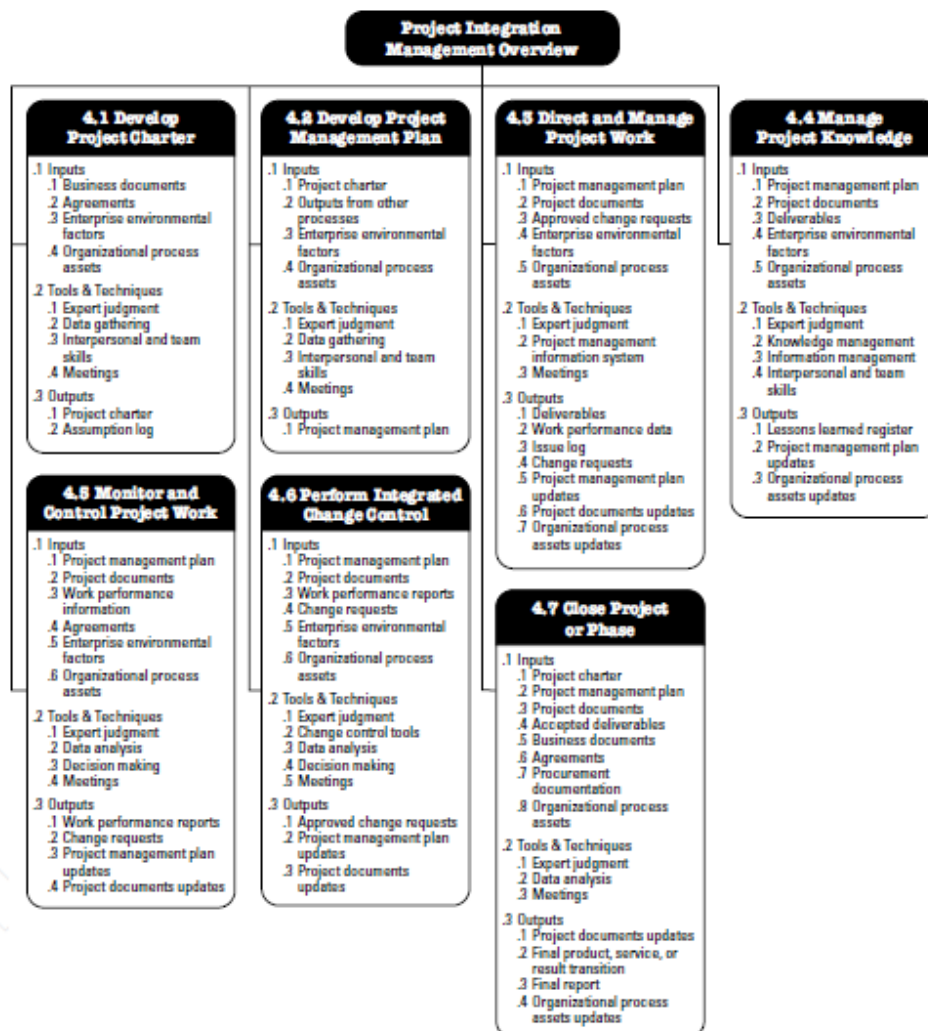
Knowledge Areas	Project Management Process Groups				
	Initiating Process Group	Planning Process Group	Executing Process Group	Monitoring and Controlling Process Group	Closing Process Group
<b>4. Project Integration Management</b>	4.1 Develop Project Charter	4.2 Develop Project Management Plan	4.3 Direct and Manage Project Work	4.4 Monitor and Control Project Work 4.5 Perform Integrated Change Control	4.6 Close Project or Phase
<b>5. Project Scope Management</b>		5.1 Plan Scope Management 5.2 Collect Requirements 5.3 Define Scope 5.4 Create WBS		5.5 Validate Scope 5.6 Control Scope	
<b>6. Project Time Management</b>		6.1 Plan Schedule Management 6.2 Define Activities 6.3 Sequence Activities 6.4 Estimate Activity Resources 6.5 Estimate Activity Durations 6.6 Develop Schedule		6.7 Control Schedule	
<b>7. Project Cost Management</b>		7.1 Plan Cost Management 7.2 Estimate Costs 7.3 Determine Budget		7.4 Control Costs	
<b>8. Project Quality Management</b>		8.1 Plan Quality Management	8.2 Perform Quality Assurance	8.3 Control Quality	
<b>9. Project Human Resource Management</b>		9.1 Plan Human Resource Management	9.2 Acquire Project Team 9.3 Develop Project Team 9.4 Manage Project Team		
<b>10. Project Communications Management</b>		10.1 Plan Communications Management	10.2 Manage Communications	10.3 Control Communications	
<b>11. Project Risk Management</b>		11.1 Plan Risk Management 11.2 Identify Risks 11.3 Perform Qualitative Risk Analysis 11.4 Perform Quantitative Risk Analysis 11.5 Plan Risk Responses		11.6 Control Risks	
<b>12. Project Procurement Management</b>		12.1 Plan Procurement Management	12.2 Conduct Procurements	12.3 Control Procurements	12.4 Close Procurements
<b>13. Project Stakeholder Management</b>	13.1 Identify Stakeholders	13.2 Plan Stakeholder Management	13.3 Manage Stakeholder Engagement	13.4 Control Stakeholder Engagement	

*Note.* The figure shows the various project management processes and the groups found in each knowledge area retrieved from PMBOK, 2017.

### 2.2.5.1 Project Integration Management

This is the document determines the plans for developing the project including the project charter with a roadmap. The Integration document also presumes that assignment of the project manager and includes other aspects of project success and monitoring. For the FGP, project integration management will be used to develop a project charter that sets up the roadmap and assigns the team needed for the successful creation of the project management office.

**Figure 7**  
Project Integration Management Overview

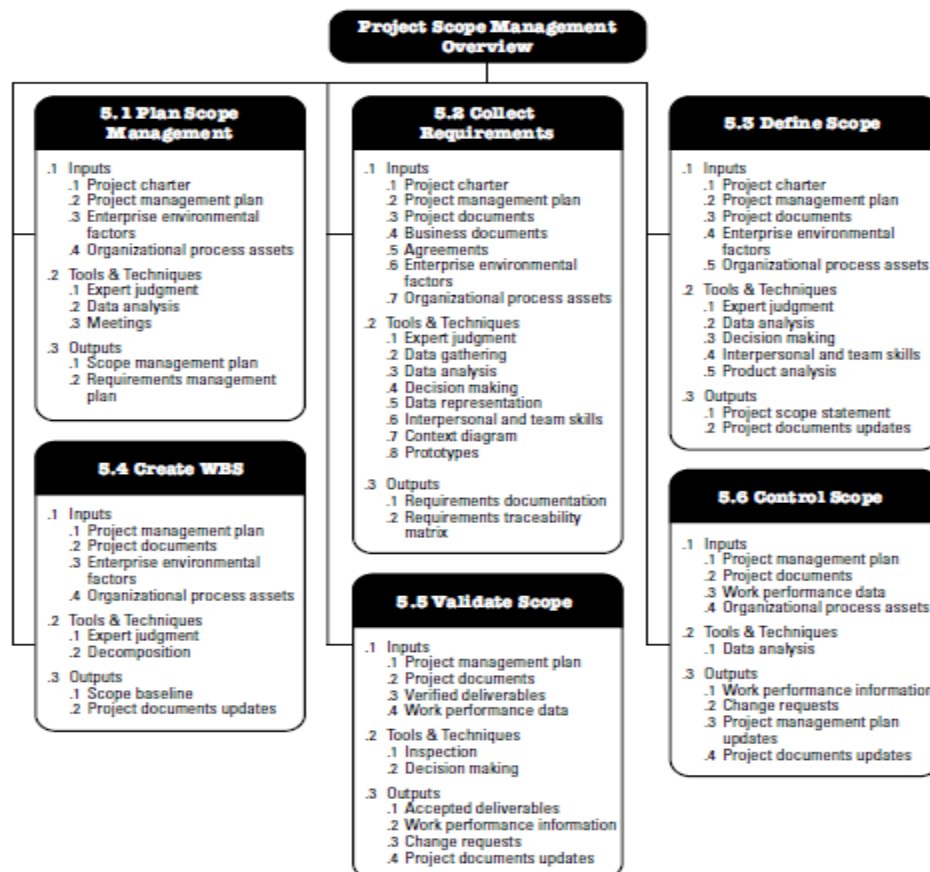


*Note.* The figure shows the project integration management overview from PMBOK (2017)

### 2.2.5.2 Project Scope Management

The scope of the project will be detailed in the plan scope management. This plan is necessary to indicate any challenges in the scope that may present risks that can impact project success. Included in the project scope management is a work breakdown structure (WBS), which is a graphic breakdown of project work and key to note is that deliverables of the WBS can also be monitored via the Validate Scope which ensures that approved deliverables are laid out to stakeholders. For this FGP, Project Scope Management will be used to create a scope management plan inclusive of a work breakdown schedule (WBS) and statement of work (SOW) that details the deliverables needed for the creation of the PMO.

**Figure 8**  
**Project Scope Management Overview**

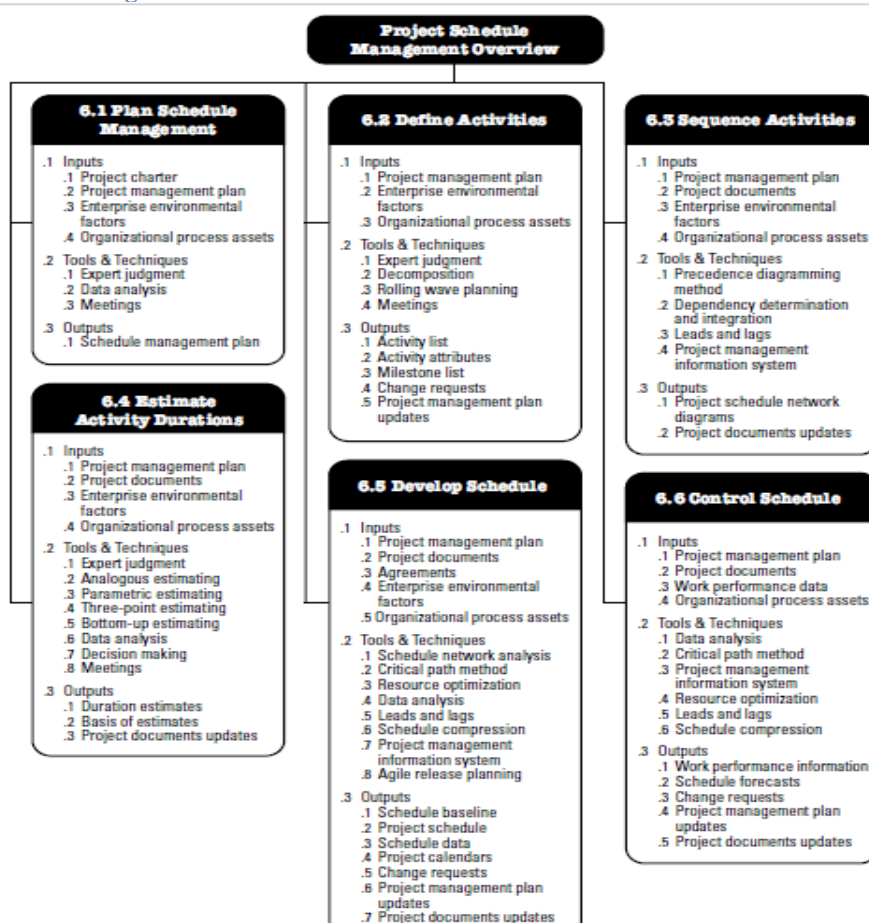


*Note.* Figure 8 shows the project scope management overview from the PMBOK, 2017.

### 2.2.5.3 Project Schedule Management

One of the most important elements of a project is to ensure that it is complete on time and that is done through the project time management. In this process, tasks are detailed, a start and end date are designated, and a budget is assigned for each task. This monitoring is important considering there are often changes or delays in the project that can impact project deadlines and the plan schedule management used to ensure that persons assigned to tasks complete them on time. Simply put, the Project Schedule/ Time Management aims to create a schedule for the project, define and prioritize activities, assign team responsibilities, and determine and estimate the resources required for each activity.

**Figure 9**  
Project Schedule Management Overview



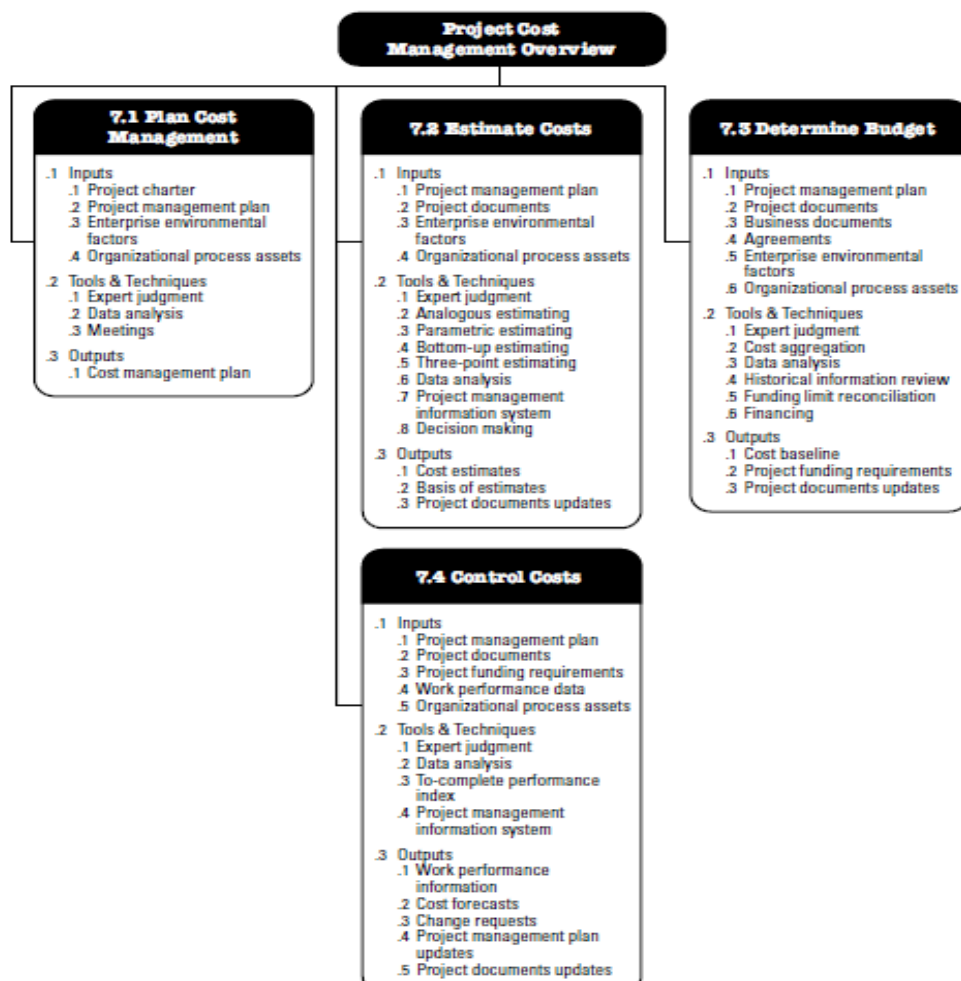
*Note.* This figure shows the project schedule management overview from the PMBOK, 2017.



### 2.2.5.4 Project Cost Management

Westland (2019) considers the Plan cost management to be the method “to establish the budget, which includes how and if it will change and what procedures will be used to control it.” It is necessary for a good system to be in place to estimate costs of labor, equipment, human and other resources needed for project completion. For this FGP, this system will help to establish the budget which needs to be constantly evaluated throughout the project lifecycle to ensure that the project remains within the funding assigned for implementation.

**Figure 10**  
Project Cost Management Overview



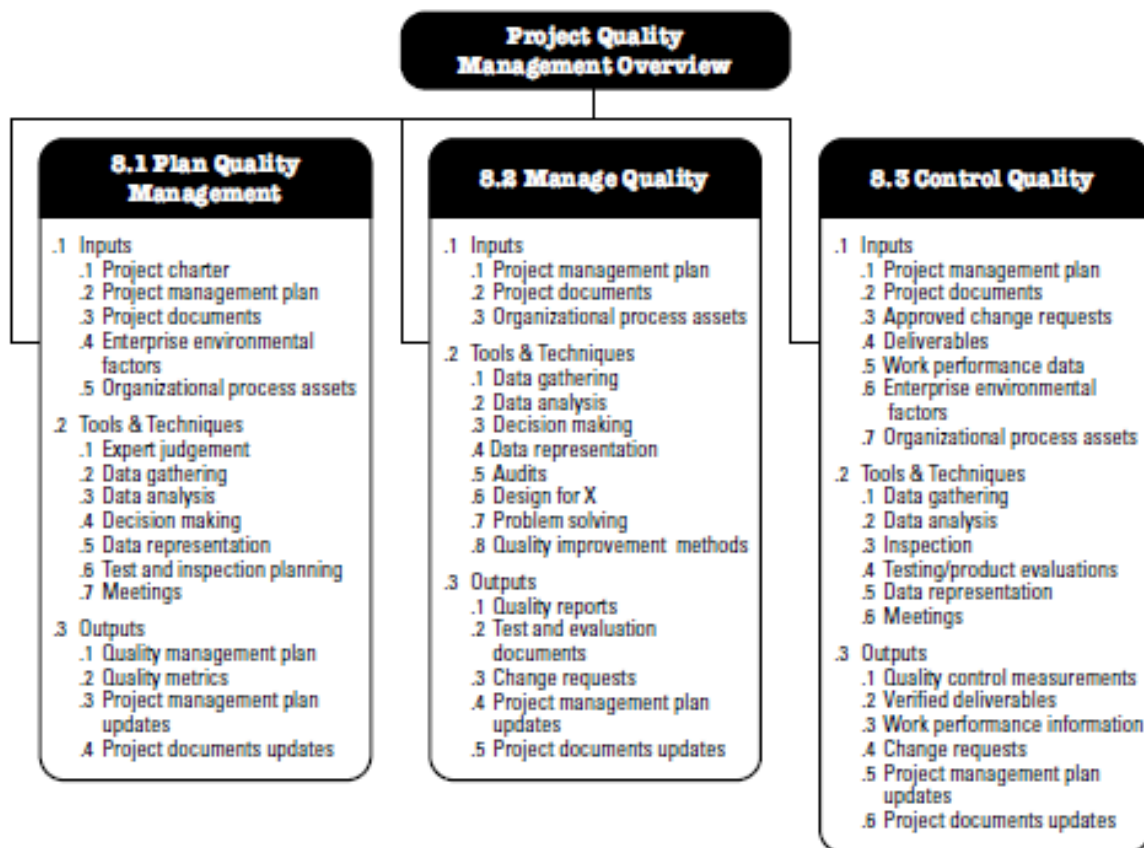
*Note.* This figure shows the project cost management overview from the PMBOK, 2017.



### 2.2.5.5 Project Quality Management

An important element of the project is ensuring the end product, whether a good or service meets the quality standards of all stakeholders within the project. Through plan quality management quality specifications are determined inclusive of quality assurance which ensures that the inspected product is qualified to be presented to market or the sponsor. Using this process, the FGP will indicate the importance of developing a quality assurance plan that ensures that the PMO will provide work that meets the standards of the PMI and the GOB.

**Figure 11**  
Project Quality Management Overview

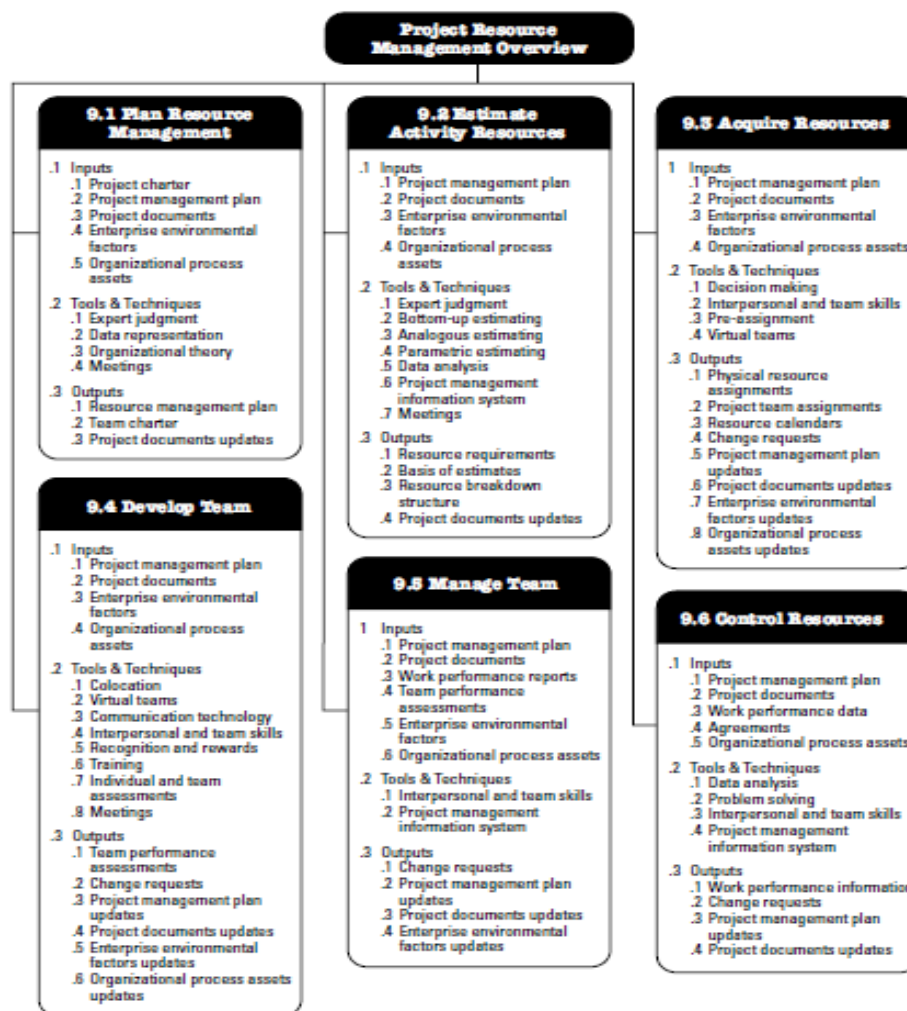


*Note.* This figure shows the project quality management overview from the PMBOK, 2017.

### 2.2.5.6 Project Resource Management

The goal of this process is to create a human resource management plan will identify team roles, their fit for positions within the project structure as well as track their performance during the project. The importance of having the right team for a project cannot be ignored and this plan will also help to determine what the team will need in terms of technical support or training.

**Figure 12**  
Project Resource Management Overview

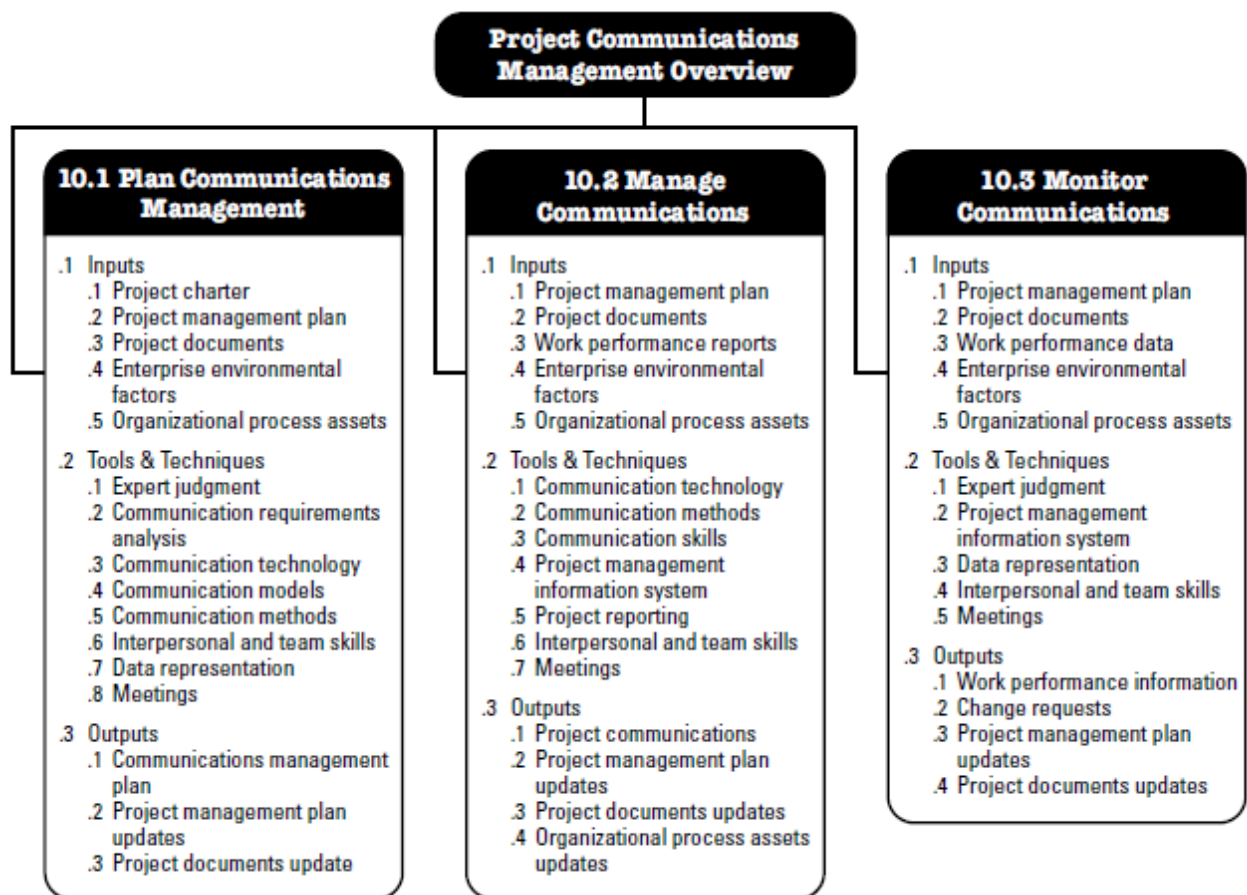


*Note.* This figure shows the project resource management overview from the PMBOK, 2017.

### 2.2.5.7 Project Communication Management

As one of the most important processes for project success it is imperative that there is a communications plan that is used to inform the team and stakeholders about the progress, changes and approvals needed for the project. This plan will indicate who speaks on what aspects of the project and who makes certain decisions when the project faces any challenges or must respond to an impending risk.

**Figure 13**  
Project Communication Management Overview

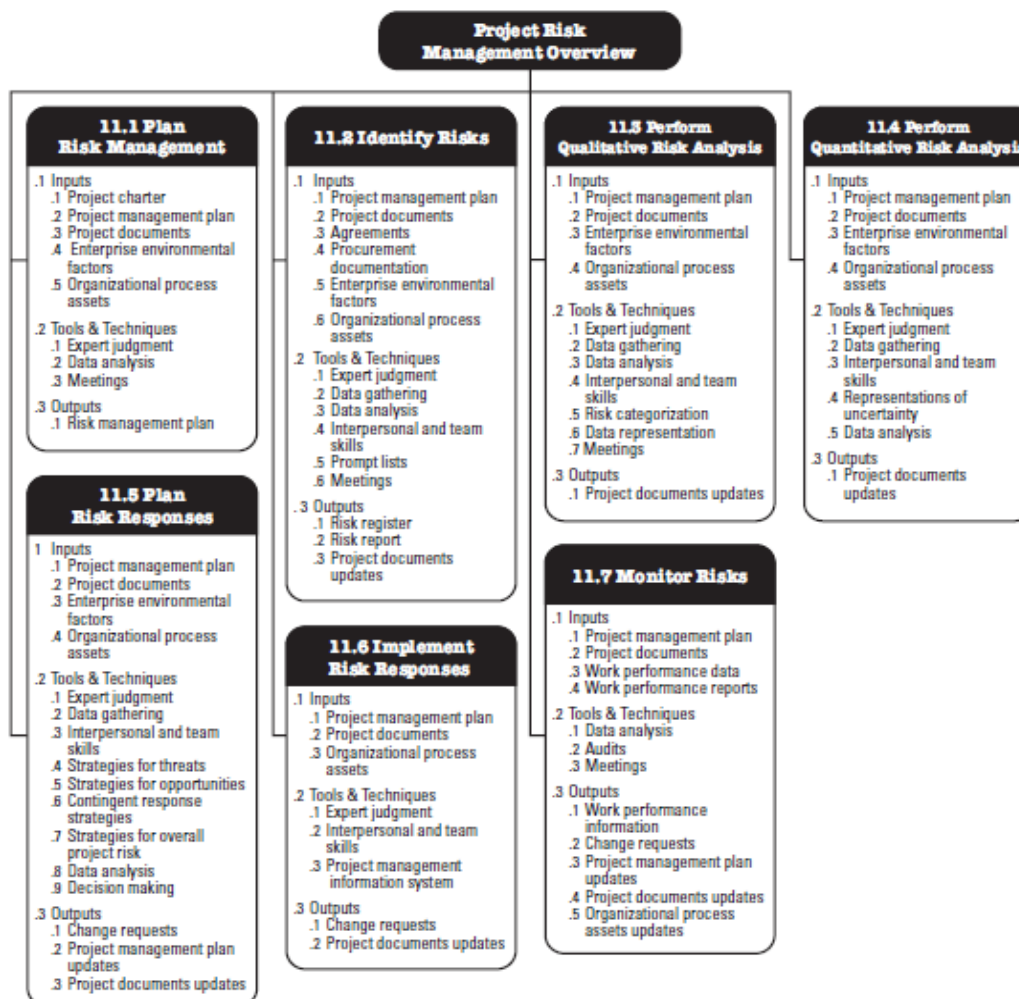


*Note.* This figure shows the project communications management overview from the PMBOK, 2017.

## 2.2.5.8 Project Risk Management

“Risk management plans will identify how the risks will be itemized, categorized, and prioritized. This involves identifying risks that might occur during the execution of the project by making a risk register (Westland, 2019). It is important for project managers to design a risk register that will identify and prioritize risks in order to perform qualitative risks analysis and properly respond to them.

**Figure 14**  
Project Risk Management Overview

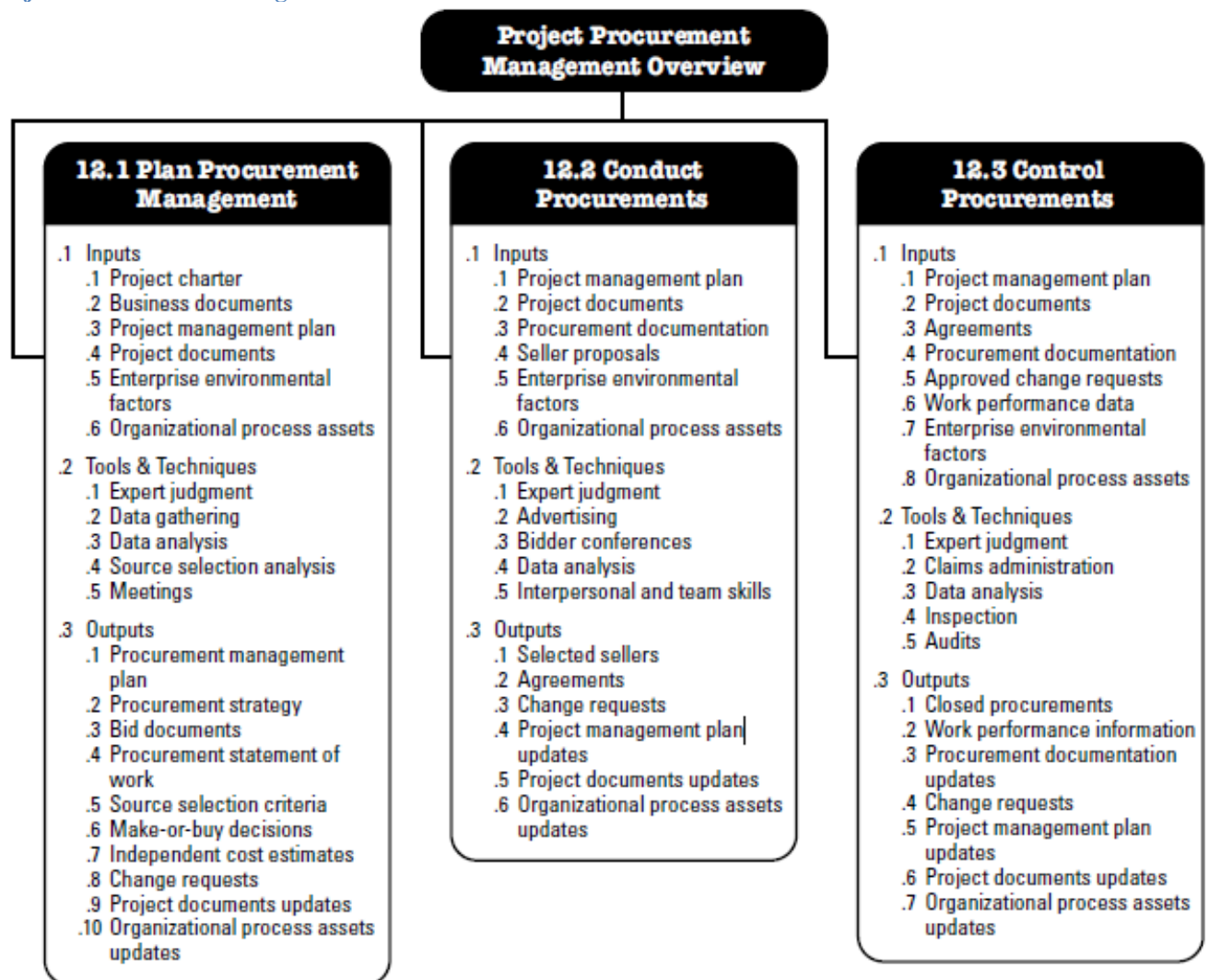


*Note.* This figure shows the project risk management overview from the PMBOK, 2017.

### 2.2.5.9 Project Procurement Management

It is necessary to create a procurement plan that defines the needs of the project, addresses how resources will be procured and indicates how the contracts will be monitored and managed. This entails the hiring of contractors and other elements of external procurement and must also be closely monitored because of its ability to impact project budget and schedule.

**Figure 15**  
Project Procurement Management Overview

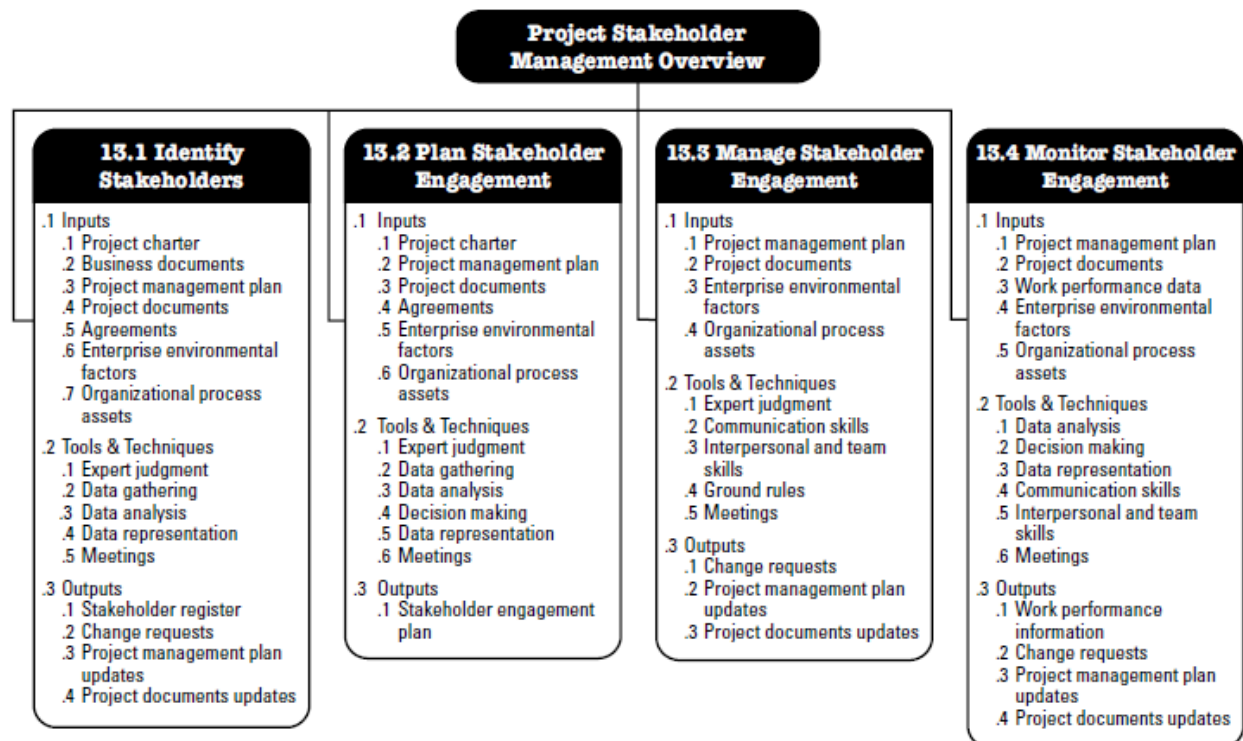


*Note.* This figure shows the project procurement management overview from the PMBOK, 2017.

### 2.2.5.10 Project Stakeholder Management

This process creates a stakeholder analysis that chronicles their expectations and ensures that the project meets the needs of all stakeholders. In this plan all stakeholders are listed, prioritized and their concerns are registered to weigh how much impact they may have on project success. Where adjustments need to be made to satisfy stakeholders, those will be made and properly communicated to the team so that risks of stakeholder objections to the project are limited.

**Figure 16**  
Project Stakeholder Management Overview



*Note.* This figure shows the project stakeholder management overview from the PMBOK, 2017.

## **2.3 Other Concepts**

### **2.3.1 Project Management Office**

A project management office (PMO) is a unit or department within an organization that defines and maintains standards for their project management. The primary goal of a PMO is to achieve benefits from standardizing and following project management processes, policies and methods. According to the PMI (2017), it “exists to shepherd business value throughout the organization. It might do this by helping projects achieve their goals”.

Bouchrika (2021) lists five main objectives of the PMO which are plan for projects, ensure governance, institutionalize best practice, oversee resource management and secure needed resources.



Figure 17  
PMO Management Structure



*Note.* Retrieved from Research.com, this figure shows the standard project management structure as sourced from Toptal, 2019.

### 2.3.2 Competencies of the Project Manager

Refers to the skills needed and the roles that the project manager plays “in the leadership of a project team in order to achieve the project’s objectives” (PMI, 2017, p56) and relates to three key skill sets: Technical project management, leadership and strategic business management. Much like the triple constraint’s triangle, these abilities in leadership and business intelligence are broken down into a triangle for the competencies of a project manager.



“Technical project management skills are defined as the skills to effectively apply project management knowledge to deliver the desired outcomes for programs or projects” (PMI, 2017). The Project Manager should be able to develop, plan and schedule the ideal strategy and mission for the execution and completion of the project. Also important is the PM’s abilities to create and analyze reports, handle risks and issues and gauge the financial implications amongst other factors that may determine project success.

### **3 METHODOLOGICAL FRAMEWORK**

#### **3.1 Information sources**

We have been taught that information is power, and it is the tool that is needed for proper decision-making especially in the government system. It is important for government to ensure that they collect the information from proper sources so that they can make proper decisions to economic, social, and political issues. Dwivedi et.al. (2018) defines an information source as “a person, thing, or place from which information comes, arises, or is obtained.” Information sources usually are primary, or secondary depending on how the author receives and conveys the information being shared.

It is important to use several different sources to ensure that you are receiving accurate data but also because various types of information help you to properly conduct your research and findings. This FGP will be using a combination of primary and secondary to gather information for the project of implementing a PMO.

##### **3.1.1 Primary sources**

A primary source is written by someone who experienced an event firsthand and is original materials on which other research studies are based. The Seton Hall University (n.d.) goes further to say that “these sources have not been modified by interpretation and offer original thought or new information.” In history primary resources are considered a gem because they “help us see history from a different perspective by revealing information about the culture at the time of the event” UHV Library (2022). For research and project management purposes, primary resources can help with the accuracy of the work being done. The input of

the source helps us to better understand people's feelings and wants, therefore allowing us to tailor our work to them.

There are several different types of primary resources including journal articles, autobiographies, laws, speeches, photographs, video recordings and interviews. For this FGP different types of primary sources will be used including articles and speeches from the organization. However, the main primary source being used will be interviews. Interviews held with the Minister, Executive Director and staff will help solidify the research supporting the need for the BELTRAIDE PMO.

### **3.1.2 Secondary sources**

On the other hand, secondary sources are usually derived from primary sources and “created by someone who did not have firsthand experience or did not participate in the events or conditions being researched” (ADHL, n.d.) However, they are also important because they can complement primary sources because it helps to build a convincing argument. While most research would like to use primary sources, secondary sources provide “analysis, interpretation and restatement of primary sources” UHV Library (2022).

Newspaper articles, textbooks, biographies, Analysis are all considered secondary since they are not really evidence but rather offer commentary on or discussion on the topic. The FGP will be using textbooks, reviews of laws and legislation, and commentaries as its mains secondary sources. This will be gathered from the information already available at BELTRAIDE, through websites such as PMI's and most importantly through the PMBOK.

**Chart 1 Information sources (Source: UHV Library, 2022)**

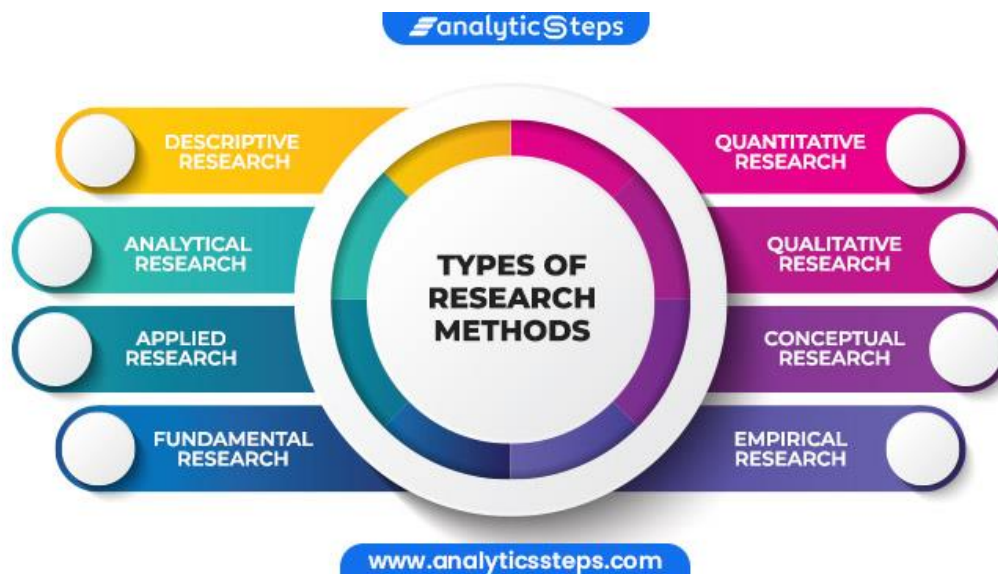
Objectives	Information sources	
	Primary	Secondary
1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.	Interview with the members of staff	Textbooks: PMBOK, BELTRAIDE policy document Online sources: websites
2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.	Staff surveys, focus group sessions, and workshops reports	Guidebooks and manuals: PMBOK, Organizational policies Online sources: websites
3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)	Interviews, Meetings	Organizational policies and manuals

4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.	Journal articles, surveys, and statistics	Reviews of laws and regulations, articles such as literature reviews, PMBOK
5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual	Statistics, interviews	Reviews of law and legislation, Organizational policies, and manuals
6. To recruit ideal personnel (where necessary) and conduct training and sensitization with existing staff on the new institutionalized project management system and associated procedures (i.e., training manual, procurement manual, fiduciary policies training sessions with technical units etc.)	Interviews, Staff meetings, surveys	Organizational Policies and manuals
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.	Organizational Charts, Interviews	Reviews of law and legislation, Organizational policies, and manuals

### 3.2 Research methods

Developing your research is key in gathering data as it assists project managers in determining whether or not their project will be feasible. Research methods relate to the “specific procedures or techniques used to identify, select, process, and analyze information about a topic.” Rangaiah (2021) identifies eight (8) different types of research methods as seen in the image below.

**Figure 18**  
Types of Research Method



*Note.* There are 8 different types of research methods as listed above by Analytic Steps, 2021. While they may not all be used for the purpose of this paper, it is important to know what they are.

This FGP will be using three types of research methods to complete the research on the development of the PMO for BELTRAIDE: Descriptive, Analytical and Quantitative Research. Must include the definition of research methods, using APA style cites as needed.

### 3.2.1: Descriptive Research Method

Descriptive research “is a form of research that incorporates surveys as well as different varieties of fact-finding investigations” (Rangaiah, 2021). It is a type of research that describes the situation that is being studied so that the researcher can get answers on how, what and when a situation occurs in order have a proper understanding of it.

### 3.2.2 Analytical Research Method

Analytical Research is a form of research that uses critical thinking skills so that the researcher can “make do with the data and factual information available at their behest and interpret this information to undertake an acute evaluation of the data” (Rangaiah, 2021). The researcher must evaluate the facts and data gathered in relation to the research being conducted.

### 3.2.3 Quantitative Research

Quantitative Research “focuses on gathering and interpreting numerical data and can be adopted for discovering any averages or patterns or for making predictions” (Rangaiah, 2021). The difference with this form of research is that it is based on numbers and often uses tables, data, and graphs to reach a conclusion.

**Chart 2 Research methods (Rangaiah, 2021)**

Objectives	Research methods		
	Descriptive Method	Analytical Method	Quantitative Method
1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.	This method used surveys and interviews to conduct gap and capacity needs analysis to determine the need for the PMO.	Critical thinking was necessary to understand and evaluate the data that was provided.	Tables and graphs were used to share the data into materials that were easy to read
2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.	Staff surveys, focus group and working sessions was used to help design the manual	Data was gathered from market research to get a clear understanding of processes.	This was not applied in this area.
3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)	Research was done related to the policies in place with hopes of using it to design the manuals	Analytical skills were used to determine if the information researched suited the FGP and PMO development	Tables were used to present data for the different policies i.e. monitoring, evaluating and reporting.



4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.	This FGP use surveys and interviews to gauge how receptive the organization is to social and environmental policies.	Journal articles were used to help analyze the current environment to best determine what policies need to be in place to meet objectives.	Quantitative analysis was done and presented in diagrams to look at the potential impact the policies have on the organization.
5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual	Research was done on the current policies to determine what, if anything needed to be changed	From the research, new policies were designed that needed to align with other policies within the organization	Graphs were used to outline the process of the system in relation to these policies
6. To recruit ideal personnel (where necessary) and conduct training and sensitization with existing staff on the new institutionalized project management system and associated procedures (i.e., training manual, procurement manual, fiduciary policies training	Staff surveys and interviews provided insight into staff fit for positions and helped to determine where a gap existed which indicated the need for new hires.	Critical thinking and evaluation allowed proper trainings and needs assessment for staff	Graphs and charts determined level of education and needs.

sessions with technical units etc.)			
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.	Research will be conducted to review the current structure in place	Critical thinking skills will determine how much authority is given to the PMO and decide the roles and functions of the PMO team	Diagrams and charts will provide a clear vision of where the PMO fits within BELTRAIDE's structure.

### 3.3 Tools

Data collection tools are the devices or instruments for gathering data, such as a paper questionnaire or computer-assisted interviewing system. The PMBOK (2017) identified 6 groups of tools and techniques along with 60 different types that are considered ungroup. The following tools and techniques groups are used throughout the PMBOK® Guide:

- “Data gathering techniques. Used to collect data and information from a variety of sources. There are nine data gathering tools and techniques.
- Data analysis techniques. Used to organize, assess, and evaluate data and information. There are 27 data analysis tools and techniques.
- Data representation techniques. Used to show graphic representations or other methods used to convey data and information. There are 15 data representation tools and techniques.
- Decision-making techniques. Used to select a course of action from different alternatives. There are two decision-making tools and techniques.

- Communication skills. Used to transfer information between stakeholders. There are two communication skills tools and techniques.
- Interpersonal and team skills. Used to effectively lead and interact” (PMBOK, 2017)

Several of the tools under these groups will be used to complete the FGP project. These are listed in the chart below.

**Chart 3 Tools (Source PMBOK, 2017)**

<b>Objectives</b>	<b>Tools</b>
1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.	Brainstorming, checklists, focus groups, interviews, market research, stakeholder analysis, questionnaires, and surveys
2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.	SWOT analysis, Market research, focus groups, interviews, cost-benefit analysis, Assumptions and constraints analysis, Histograms, Feedback, communications
3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)	Histograms, Feedback, presentations
4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.	Political awareness, Market research, statistical sampling, surveys and questionnaires
5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual	Brainstorming, market research, interviews, risk data quality assessment
6. To recruit ideal personnel (where necessary) and conduct training and sensitization with existing staff on the new institutionalized project management system and associated procedures (i.e., training manual, procurement manual,	Observation/ conservation, teambuilding, influencing, focus groups, performance reviews

fiduciary policies training sessions with technical units etc.)	
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.	Organizational charts, interviews

### 3.4 Assumptions and constraints

An assumption is what you believe to be true even when it cannot be proven but rather derived based on whatever information one may have available. Usmani (2021) mentions that “these are anticipated events or circumstances that are expected during your project’s life cycle.” However, they play a vital role in project management as it gives a team an opportunity to think about what may go wrong and weigh its potential impact

Project constraints, on the other hand, are limitations imposed on the project, in relation to budget, schedule, or resources. The PMBOK Guide (2017) recognizes six project constraints: scope, quality, schedule, budget, resources, and risk. “The most common constraints cited in project management are: scope (what the project needs to deliver), schedule (how much time do we have to deliver that scope), and cost (how much funding has been allocated) (Usmani, 2021).

The FGP will use assumptions and constraints in various ways to evaluate what challenges may arise in the PMO project so that they can determine the best ways to mitigate the risks.

**Chart 4 Assumptions and Constraints (Source: BELTRAIDE)**

Objectives	Assumptions	Constraints
<p>1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.</p>	<p>1. Meaningful participation of staff in the process.</p> <p>2. The most efficient and effective tools and resources to achieve project outcomes.</p>	<p>1. Government policies or political influences that directly oppose the aim of the project.</p> <p>2. Timely identification of suitable consultant/ consulting firm</p>
<p>2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.</p>	<p>1. Activities support multi-stakeholder dialogue and capacity building in project management systems.</p> <p>2. The most efficient and effective tools and resources to achieve project outcomes are selected.</p>	<p>1. Government policies or political influences that directly oppose the aim of the project.</p> <p>2. Slow uptake and adoption of new policies and guidelines by staff.</p> <p>3. Timely identification of suitable consultant/consulting firm.</p>

Objectives	Assumptions	Constraints
	<p>3. Taking a bottom-up and inclusive approach to staff development is essential to uptake of the materials delivered.</p> <p>4. Finance, technology, and expertise to support delivery successfully mobilized.</p>	
<p>3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)</p>	<p>1. Activities support multi-stakeholder dialogue and capacity building in project management systems.</p> <p>2. The most efficient and effective tools and resources to</p>	<p>1. Government policies or political influences that directly oppose the aim of the project.</p> <p>2. Slow uptake and adoption of new policies and guidelines by staff.</p> <p>3. Timely identification of suitable consultant/consulting firm</p>

Objectives	Assumptions	Constraints
	<p>institutionalized Monitoring and Evaluation systems are selected.</p> <p>3. Taking a bottom-up and inclusive approach to staff development is essential to uptake of the materials delivered.</p> <p>4. Finance, technology, and expertise to support delivery successfully mobilized.</p>	
<p>4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.</p>	<p>1. Meaningful participation of BELTRADE stakeholders (i.e., NGOs, private sector and government staff).</p>	<p>1. Government policies or political influences that directly oppose the aim of the project.</p> <p>2. Slow uptake and adoption of new policies and guidelines by staff.</p>



Objectives	Assumptions	Constraints
	<p>2. Finance, technology, and expertise to support delivery successfully mobilized.</p> <p>3. Delivers a set of appropriate policies and guidelines to promote Environmental and Social Safeguards.</p> <p>4. The process is gender responsive.</p>	<p>3. Timely identification of suitable human resources</p> <p>4. Limited technical capacities, resources, and knowledge to design, implement and maintain Environmental and Social systems.</p>
<p>5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual</p>	<p>1. Meaningful participation of BELTRADE stakeholders (i.e., NGOs, private sector and government staff).</p> <p>2. Finance, technology, and expertise to</p>	<p>1. Government policies or political influences that directly oppose the aim of the project.</p> <p>2. Slow uptake and adoption of new policies and guidelines by staff.</p>

Objectives	Assumptions	Constraints
	<p>support delivery successfully mobilized.</p> <p>3. Delivers a set of appropriate policies and guidelines to promote Environmental and Social Safeguards.</p>	<p>3. Timely identification of suitable.</p>
<p>6. To recruit ideal personnel (where necessary) and conduct training and sensitization with existing staff on the new institutionalized project management system and associated procedures (i.e., training manual, procurement manual, fiduciary policies training sessions with technical units etc.)</p>	<p>1. Finance and expertise to support delivery successfully mobilized.</p> <p>2. Timely identification of suitable persons with the relevant expertise.</p> <p>3. Taking a bottom-up and inclusive approach to staff development is essential to uptake</p>	<p>1. Slow uptake of capacity building and guidelines by staff.</p> <p>2. Government policies or political influences that directly oppose selection of suitable candidates for training.</p>

Objectives	Assumptions	Constraints
	of the training and capacity materials delivered.	
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.	Upper management will be receptive to the new office  GOB will accept the placement of the PMO at BELTRAIDE	Slow recruitment approval process and review of PMO roles and functions

### 3.5 Deliverables

The PMBOK defines a deliverable as “any unique and verifiable product, result, or capability to perform a service that must be produced to complete a process, phase, or project” (PMBOK. 2017). In project management these deliverables help to keep track of the project and provide resources that the project team can reference, track their performance, and also provide transparency to stakeholders on the work being completed.

#### Chart 5 Deliverables (Source PMBOK, 2017)

<b>Objectives</b>	<b>Deliverables</b>
1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.	Institutional Gap Analysis, Capacity Needs Assessment Report, Maturity Analysis Report (inclusive of updated organizational structure)
2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.	Project Management Manual
3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)	Monitoring and Evaluation Policy and Procedural Manual
4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.	Environmental and Social Management Policy Gender Policy
5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual	Procurement Policy (inclusive of rules and guidelines)
6. To recruit ideal personnel (where necessary) and conduct training and sensitization with existing staff on the new institutionalized project management system and associated procedures (i.e., training manual, procurement manual, fiduciary policies training sessions with technical units etc.)	Training Manual, Training and Capacity Building Materials, Staff Policy
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.	Organizational Chart, Terms of Reference (TOR)

## 4 RESULTS

### 4.1. Maturity Analysis Report

Given the complexity and dynamics of the business environment, it is complicated to have a universal M&E framework that applies to all portfolios. However, As presented by Project Management Institute (2017), there are six domains that can be used to measure effectiveness of an organizational portfolio. These domains are:

- **Strategic Alignment:** ensures alignment of portfolio components (programs, projects, and operations) with organizational strategic objectives, goals, and priorities.
- **Governance:** ensures the establishing of governance model, developing the portfolio management plan, and approving the portfolio.
- **Capacity and Capability Management:** ensures that competent staff and adequate resources are present.
- **Risk Management:** ensures the balancing and management of portfolio risk consistent with the risk appetite of the organization and facilitates decision making.
- **Stakeholder Engagement:** ensures the continuous engagement/communication with stakeholders. This is for understanding their needs and expectations; addressing issues as they occur; managing conflicting interests; and fostering appropriate stakeholder engagement in portfolio decisions and activities.
- **Value Management:** ensures that investment in a portfolio delivers the required return as defined in the organizational strategy.

One of the first steps for the development of the Project Management Office (PMO) is to determine how ready the organization is for a PMO. To determine this is to first conduct a gap analysis using SWOT in terms of project management practices that currently exist and then to further determine how these will be filled. Through an interview with managers within the organization and key partners, reasons for the existence of these gaps and their potential impact on organizational and project performance.

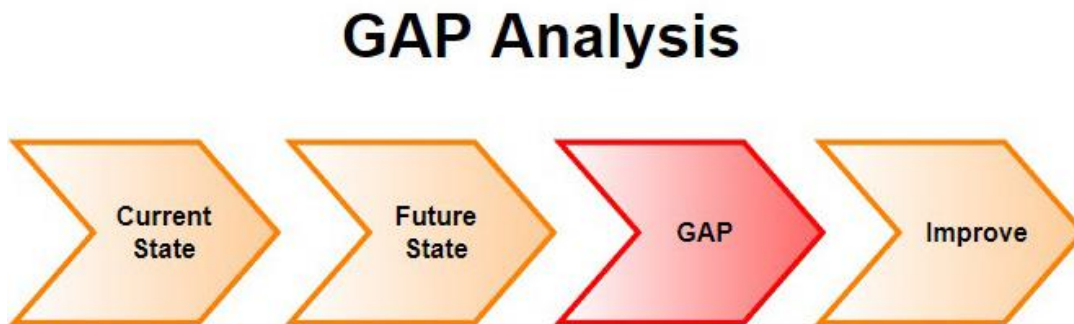
**Figure 19**  
PMO SWOT Analysis

<b>BELTRAIDE PMO OFFICE</b>	
<b>SWOT ANALYSIS</b>	
<b>Strenghts</b>	<b>Weaknessses</b>
Current staff competent Reputation Government Support Local Project Managers	Insufficient staff to do w ork Late project delivery Limited resources Quality of w ork Time delivery
<b>Opportunities</b>	<b>Threats</b>
Can meet Government initiatives Better delivery time Access to new funding agencies	Competition from other agencies Access to finance reduced

*Note.* This figure shows the SWOT analysis for the prospective PMO of BELTRAIDE. Th source of this analysis is the author.

In determining one of the challenges of the organization, it was noted that BELTRAIDE struggles with not only completing projects on time but meeting some of the standards set by funding agencies. Through this study, the gap analysis between recent projects and project management standards and methodologies will be carried out.

**Figure 20**  
**Gap Analysis**



*Note.* The figure above reflects the stages of measuring gaps within a specific project and as shared by Opinaldo, 2022, provides a blueprint for the analysis.

**Chart 6 Gap Analysis (Source: Author)**

Focus	Current state	Future State	Gap	Action to Improve
<b>Office Space</b>	150 sqft	500 sqft	30%	Restructure current office
<b>Office Equipment</b>	Lack resources for new staff	Tables and chairs for staff	50%	Purchasing office equipment for new staff
<b>Project Management Software</b>	Using illegally downloaded software programs	Professional project management software installed	90%	Purchasing software that will help to better manage projects
<b>New Staff</b>	3 employees	10 employees	30%	Hiring new employees to meet demands of the PMO
<b>PMO Manuals</b>	Procurement manual exists	Manuals completed	80%	PMO processes in place for PMO success
<b>Current Projects</b>	Outstanding pipeline projects needs evaluation	Pipeline projects will meet time timelines	50%	Meeting stakeholder standards
<b>Stakeholder Satisfaction</b>	Unhappy with project execution time and quality	Satisfaction increase to 100%	60%	Using surveys to measure increase in satisfaction

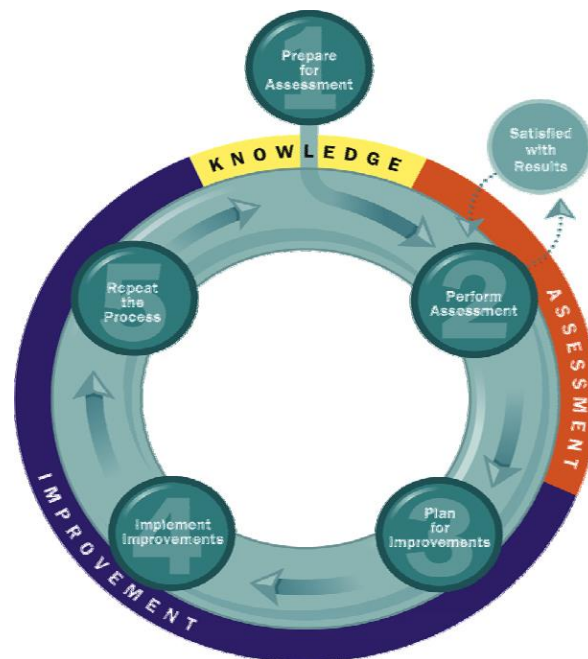
Following the Gap Analysis which will be used to compare the organization's current state with industry benchmark data and stakeholder requirements the maturity analysis will be done. The current state of OPM maturity is typically determined through an OPM maturity assessment using an OPM model.

For the development of the PMO it is important to conduct a maturity analysis in order to identify the organizational needs and identify its readiness for the Project Management Office (PMO). Using the OPM3 which helps companies to understand the management of projects, programs and portfolios at an organizational level and measure the capabilities in relation to a set of accepted best practices, as does the PMBOK (PMI, 2017).



Developing a maturity analysis will help to design a model that can be used to measure the current maturity level of a certain aspect of an organization in a meaningful way, enabling stakeholders to clearly identify strengths and improvement points, and accordingly prioritize what to do in order to reach higher maturity levels.

**Figure 21:**  
**OPM3 Model**



*Note.* The OPM3 Model (PMI, 2004) shows additional steps for when conducting a maturity analysis.

According to the OPM3 the steps when conducting a maturity analysis are as follows:

**Prepare for Assessment.** Which requires a good grasp of the OPM3 concepts and organizational project management that will be used to develop the analysis.

**Perform Assessment.** Using the OPM3 Self-Assessment and its tools to help assess BELTRAIDE's degree of maturity and identify areas of strength and weakness.

During this step a detailed assessment will be done to determine what best practices exist within the organization in order to figure out improvements and decide where resources need to be allocated. According to the MBA Knowledge Base (MKB) (n.d.), “following the assessment phase, an organization might take one of three paths: 1) continue into the improvement planning process, 2) repeat some part of the assessment, or 3) exit the process, if they are currently comfortable with their maturity in organizational project management”.

**Plan for Improvements.** Organizations that choose to exit can revisit the assessment stage to ensure that they are monitoring progress. This that choose to pursue and implementation plan (which will be discussed later) they will need to develop an improvement plan. This will include ensuring that they have permits and best practice information that will result in the best outcomes for the projects and office.

**Implement Improvements.** In this step, the plan starts to come into place and the necessary organizational changes start to occur opening way for the implementation plan to come into effect. This includes the “development activities to attain the needed capabilities and advance on the path to organizational project management maturity” (MKB, n.d.)

**Repeat the Process.** As BELTRAIDE is constantly receiving new projects and funding, after completing the implement improvements with change activities the organization may need to reassess the level of maturity. It may also be necessary for the organization to investigate areas that may have been missed before but can benefit from the best practices.

Finally, the goal is to give recommendations to BELTRAIDE on how improve project management and identify any necessary improvements for an implementation plan.

#### **4.2. Implementation Plan and Project Management Manual**

There are several benefits to launching a PMO which is an organizational change project which would help with better strategic alignment, use of better resources, prioritization of projects and most importantly for BELTRAIDE, increase productivity. For the BELTRAIDE PMO, an Implementation plan and Project Management Manual will include clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.

The Implementation Plan comes after the gap and maturity analysis which would have produced the improvements and recommendations that are needed. It also starts to allow for the prioritization of activities and projects which will come with its timelines, costs and needed resources.

There are several steps to developing an Implementation plan for a PMO including:

1. Establishing the role, scope and outcomes
2. Reviewing existing projects and skills levels to identify needs
3. Planning the implementation according to needs
4. Establishing procedures and processes
5. Reviewing of the PMO

### **Establishing the role, scope and outcomes**

In this phase, a clear establishment of what the role of the PMO will be for the organization needs to be set in place. This will include the roles of the different stakeholders and board towards PMO success. Additionally, this will also indicate what the outcomes of the office should be.

The role of the PMO will be to lead all project and program initiatives of BELTRAIDE in relation to investment, trade and entrepreneurship. It will be headed by the Program Manager who will be responsible for overseeing the day-to-day work of the PMO team and will report to the Executive Director and the Board where necessary. Specifically, the functions of the PMO are to:

- Develop project management methodologies
- Implement the professional project and program management tools
- Coordinate Program and Portfolio Management
- Facilitate and improve Strategic Project Management
- Optimize Resource Allocation and maximize Resource Utilization
- Create and maintain Collaboration-Conducive Work Environments
- Provide Information and Training for Institutional Improvement
- Monitor and Control Project Execution Performance

**Reviewing existing projects and skills levels to identify needs**

This should encompass how the projects are currently being done in the organization and based on gaps that were initially identified, there should be a review on any existing project-based structures and project portfolios. In this phase it is also necessary to identify the skills of the team members and determine their fit and qualifications for the PMO.

Currently there are three employees within the Projects Unit of BELTRAIDE:

**Employee 1: Senior Projects Officer**

The incumbent has a Masters Degree in Project Management and has led the implementation of several of the projects/programs received by BELTRAIDE. She is bilingual which is necessary considering the majority of the countries that provides funding or programs to the organization are Spanish-speaking countries. However, she lacks skills in procurement management and still struggles to communicate with stakeholders on projects. Reports from the unit area often late and comments from some partners are not favorable on her competence.

**Employee 2: Projects Officer**

The incumbent is currently pursuing a Masters Degree in Project Management and holds a degree in International Relations. She has the capacity but lacks the experience in implementing projects as that role was always placed on the Manager of whatever technical unit the project may be assigned to. She is an important addition to the team, however she has expressed her desire to leave the organization at the completion of her studies. This will

create further challenges within the organization and is a risk that needs to be taken into account.

### **Employee 3: Projects Assistant**

Possesses a bachelor's degree in Business and shows interest in learning more about project management but will need to be further qualified. He aids the team in data entry and other smaller assignments and can remain at the assistant level or can be further developed to be more integral to the team.

The PMO will require the hiring of additional staff that will complement the current staff and occupy the vacant positions. This will increase the project management staff from three to ten allowing the organization to meet the demands of the organization and the Government of Belize. These staff should be able to meet the basic requirements for work within the PMO which includes:

<b>PMO Staff</b>	<b>Minimum Requirements</b>
Program Manager	Master's degree or higher in project management, or finance with at least 10 years' experience in a managerial position.
Project Manager	Master's degree or similar qualifications in project management with at least 5 years' experience.
Procurement Manager	Master's degree or similar qualifications in project management or at least 5 years' experience in procurement.
Project Officer	Bachelor's degree on project management or at least 3 years' experience in project management.

Procurement Officer	Bachelor's degree in management, business with 3 years' experience in procurement.
Office Assistant	Associate degree in management, business, or any related field

### **Planning the implementation according to needs**

The gap analysis will provide a great idea of what the needs of the organization are and combined with the overall purpose of the PMO, an implementation plan will be prepared on the way forward.

Currently there are a few projects either in the pipeline or currently being executed by the projects unit but led by technical managers. These include the Female Entrepreneurship Program (upcoming cohort), Covid Relief for Women in Emerging Industries (Seaweed & Music), The Telecenters, The SBDCBelize Incubator, and The Mobile Incubator. The projects have all been behind schedule with the telecenter and incubators being delayed. This delay has led to the withholding of finance that is needed for the other projects to close.

This disclosure will ensure that the implementation plan considers the need for staff as a priority and also the need to respond to stakeholder needs. Apart from the need for staff, there is also need for space within the organization to house the PMO. In planning the implementation a maturity analysis revealed that the organization is moderately prepared for the development of a PMO at BELTRAIDE that will serve not only the organization but also the Government of Belize.

## **Establishing procedures and processes**

For the BELTRAIDE PMO there are several documents needed on training and the processes that the organization will take, and, in this phase, those are ironed out. The templates will be created, and the different reporting mechanisms, timeframes, roles, and reporting responsibilities will be developed.

The procedures and processes that need to be in place reflect those deliverables from 10 processes as presented by the PMBOK. These deliverables, specific to the implementation of the BELTRAIDE PMO are captured in Chart 5 (Deliverables) and include:

- **Institutional Gap Analysis**

This will enable the organization to truly assess where it stands, what is missing in line with the organization's goals and what steps they need to take to determine how they will get to where they need to be. This is crucial to the growth of the project's unit within BELTRAIDE and will also assist with proper resource allocation. At the end of the gap analysis there will be a clear understanding of what is preventing the current state from getting to the desired state and will respond to why the organization needs to hire additional staff.

- **Capacity Needs Assessment Report**

After having a clear idea of what the gaps are within the organization, to ensure that the PMO will align with the needs of the organization, a report can be done to evaluate



whether the current staff on board have the training, resources, and qualifications that they need to get the job done. In doing so, this will divulge into employees' current performance, their readiness for training and their fitness for the new roles within the PMO.

- Maturity Analysis Report

“Project management maturity refers to an organization’s development of a project management approach, methodology, strategy, and decision-making process” (PMSolutions, n.d.). The report will evaluate the goals, resources, scope and needs of the organization in order to determine how it will adapt. Guided by a project management expert, this analysis will determine the level of maturity that BELTRAIDE has in project management and will indicate, via a roadmap the necessary steps that the organization need to take to reach maturity and improve the projects unit or the PMO.

- Project Management Procedural Manual

To assist project management staff and stakeholders with the requirements of project management, what is needed at different stages of the project and provide links to key reference materials. A key document that will be used for developing this manual as a part of the implementation plan will be the Guide to the Project Management Body of Knowledge (PMBOK), 6<sup>th</sup> edition. Using this resource, the manual will provide a set of proven techniques and tools that will guide the team to complete their responsibilities in line with the organization’s goals and as effective as possible.

- Monitoring and Evaluation Policy

The M&E Policy will be crucial in assessing if progress is being made for the expected results of the projects. This policy will be used to systematically organize the collection of specific data to be assessed, indicating roles and responsibilities of the team members for the project. It will also be used to guide the PMO team from the inception of the project until its closure. Not only is it required for each project or program, but it will also determine whether there are any unintended effects from a particular project so that the team can immediately respond to ensure the least number of failures.

- Environmental and Social Management Policy

The focus of the ESMP is to assess the impact of the projects or programs being undertaken by BELTRAIDE and measure and quantify the degree to which the organization is operating in a sustainable manner regarding the environment and climate. Using this policy to guide the selection and implementation of projects, the organization will be able to ensure that it is operating within the regenerative framework and in line with the sustainable development goals. It is imperative that BELTRAIDE prioritizes this policy as most of its funding is dependent on conducting projects that positively enhance the environment and disadvantaged social groups.

- Gender Policy

Belize has a National Climate Change Gender Action Plan (2022-2017) that is integral in integrating gender considerations into socioeconomic development within vulnerable groups across the country. This policy will ensure that in the design of projects or

programs, the effects that they will have on women, especially, will be taken into consideration. The gender policy will also extend to the hiring of staff within the PMO enabling the team to be inclusive.

- Procurement Policy

The policy will provide a detailed guide on the planning process which identifies the resources needed, the selection of vendors and the administration of those resources that are needed as a part of the project or program. This will include how the organization will go about purchasing, renting, or contracting the resources that are needed to meet the project goals and who will be responsible for decision making. The procurement policy will especially ensure that there is a checklist that the team must capture for successful closing of the project with a summarizing of future needs.

- Training Manual and Staff Policy

The training and staff manual will provide the guidelines that governs the instructions that improve the quality with which a job, process, or task is performed. The staff manual will focus on the human resources aspect of the organization in terms of the hiring process ensuring that the right employees are within the right jobs, and that they are qualified to get the job done with the resources to complete their tasks. Each of these members will be required to do training for their roles to either refresh their skills or to ensure that they are aware of what the guidelines are especially when it comes to the work within the project management office.

- Organizational Chart with Terms of Reference for PMO staff

The organizational chart will provide the structure of BELTRAIDE inclusive of the new PMO and the terms of reference that accompanies that chart will provide staff roles, functions, minimum qualifications etc. The organizational chart will be key in the project management process, inclusive of the communication, power and authority chain and will be used to inform staff on who they need to report to throughout projects or programs.

### **Reviewing of the PMO**

It is important to frequently review the overall scope of the PMO to ensure that it is up to date as the methodologies and structures continually evolve. BELTRAIDE's PMO is likely to see many changes as it starts to get more responsibility from the Government of Belize and regularly reviewing its performance will ensure that it is meeting the GOB's mandate.

A quarterly report must be presented on the status of the PMO from implementation to operation. This will include providing updates to the Board of the current projects and programs, those in the pipeline and whatever request that the PMO is making for future projects that fit within the organization's and government's mandate.

**Chart 7 PMO Installation (Source Author)**

<b>PMO Install</b>	<b>Timeline</b>
<b>1.0 Establishing the role, scope and outcomes</b>	
1.1 Finalize the vision & role of the PMO within BELTRAIDE	Week 1
1.2 Finalize the scope of the office	Week 1
1.3 Define and finalize overall outcomes of the PMO	Week 1
1.4 Finalize PMO plan	Week 3
<b>2.0 Reviewing existing projects and skills to identify needs</b>	
2.1 Establish project review process	Week 4
2.2 Review reports on status of other current and pipeline projects	Week 4
2.3 Determine the qualifications and skills of current staff	Week 5
2.4 Identify the needs based on gaps	Week 5
<b>3.0 Planning the implementation according to needs</b>	
3.1 Complete gap analysis	Week 6
3.2 Standardize project deliverables	Week 6
<b>4.0 Establishing procedures and processes</b>	
4.1 Change management process	Week 7
4.2 Project initiation & plan templates	Week 7
4.3 Project milestone standards	Week 8
4.4 Scope management process	Week 8
4.5 Project acceptance process	Week 8
4.6 Procurement Process	Week 8
4.7 Resource management process	Week 9
4.8 Monitoring, Evaluation & Reporting Process	Week 9
4.9 Training and Mentoring	Week 9
<b>5.0 Reviewing the PMO</b>	
5.1 Roll out the PMO	Week 10
5.2 Review of the PMO status	Week 20 +

### **Project Management Plan**

The BELTRAIDE PMO will be responsible for several projects as directed by the Government of Belize and its stakeholders and through a standard project management plan, a breakdown of the vision and goals to execute the project will be provided. The success of the projects will be dependent on a well-defined plan that will plot out the timelines, budget, procurement plan, deliverables and other activities that are necessary for project execution.

For this paper, a Project Management Plan will not be created for a specific project but rather the template of the project management plan will include the following sections:

**Executive Summary:** A short description of the contents of the plan

**Project Scope & Deliverables:** An outline of the confines of the project, and a description of how the project will be broken down into measurable deliverables

**Project Schedule:** A high-level view of project tasks and milestones

**Project Resources:** The financial, human resources, and other resources required to meet project goals

**Risk and Issue Management Plan:** A list of factors that could derail the project and a “systematic process of identifying, analyzing, and responding to project risks” (PMBOK, 2017).

**Procurement Plan:** A plan to specify the approach to identifying and recruiting potential sellers.

**Communication Management Plan:** A plan for how team and stakeholder communication will be handled over the course of the projects.

### **4.3. Monitoring, Reporting and Evaluation Framework**

A monitoring and evaluation framework that is well thought can greatly assist with developing programmatic strategies, objectives, and planned activities, and determining whether they are the most appropriate ones to implement.

The success of the PMO is also highly dependent of a proper Monitoring, Reporting and Evaluation Framework (MREF). This will enable the Government of Belize to analyze the extent of influence the projects done through BELTRAIDE has on accomplishing their goals within their strategic development plan, Plan Belize. There is often a very strong positive relationship between an M&E framework and public trust within the communities and other stakeholders including the funding institutions.

The entry of M&E into Belize was largely done by these same donor agencies including IDB, UNDP and GCF who called for greater transparency and accountability in projects where their funding is being used. Understandably, this also supports deepening the ties between Belize and other countries in the region and internationally who maintain a thriving relationship.

While monitoring is considered a “systematic and routine collection of information from projects and programmes”, evaluation is a “systematic process used to determine the merit or worth of a programme or strategy in a specific context” (Wilson, et al, 2020). Equally important is the implementation of principles for the development of an M&E strategy to ensure that there is accountability and good ethical practices.

**Chart 8 Monitoring and Evaluation Principles (Source Author)**

<b>Principle</b>	<b>Recommendation</b>
<b>Transparency</b>	BELTRAIDE will monitor the progress of actions identified in the Implementation Plan and provide an annual report on progress. They will maintain the overall M&E strategy and will engage in ongoing dialogue with stakeholders inclusive of the Government of Belize, Funding agencies and any other parties responsible for carrying out actions or benefitting from programs.
<b>Simplicity</b>	The M&E strategy will employ a straightforward, simple approach that will aim to minimize the reporting burden for BELTRAIDE and other relevant stakeholders. Using a self-reporting strategy, organizations identified in the IP will be responsible for notifying BELTRAIDE of progress against targets. This notification process will have a low resource requirement.
<b>Integration with Environmentally Sustainable Management Plan (ESMP)</b>	In many cases the monitoring and evaluation of progress on adaptation may not be very different from monitoring and evaluation of progress towards development goals (or indeed other areas). While the development of adaptation indicators is a new field, and best practice is still emerging, using the ESMP defined in this paper and following the

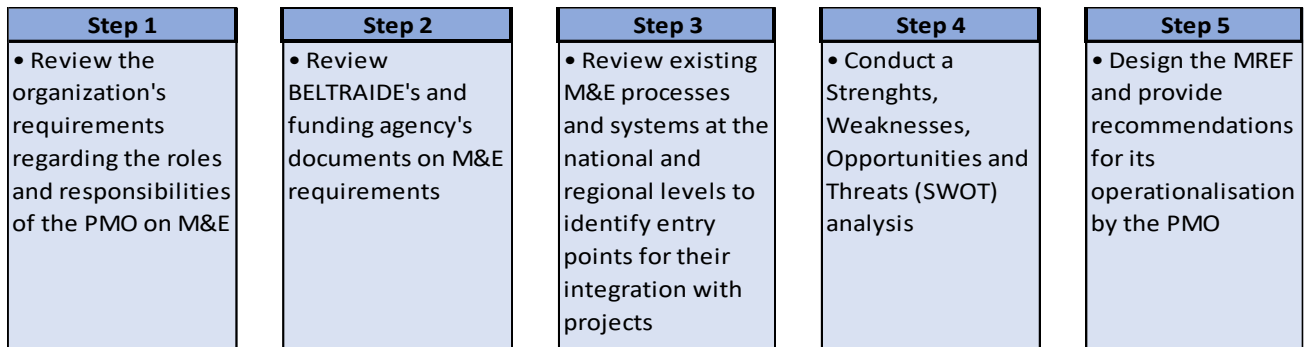


	<p>SDGs will provide a good tool to monitor Belize's sustainable development indicators.</p>
<p><b>Relevant to the Organization's Mandate</b></p>	<p>BELTRAIDE's mandate is centered around investments, exports, small business development and capacity building. Projects that are adapted by the organization must remain relevant to what the organization represents. This means that they must benefit the clients of BELTRAIDE and must reflect an improvement in the lives of beneficiaries.</p>
<p><b>Relevant to the regional and national specific challenges</b></p>	<p>Most of the projects are either done with financing from regional and international bodies so it will require that the indicators and measures used in M&amp;E are relevant and specific to that country. However, it must still hold some uniqueness to Belize and its own priorities on the national level especially where Plan Belize is concerned.</p>

## Methodology

The figure below provides the method that will be used to advance the MR&E framework that will be used for the organization.

**Figure 22:**  
**M&E Methodology**



*Note.* The figure shows the measuring and evaluation methodology to be used in the PMO design. Source of the figure is the author.

## Chart 9: M& E Reporting Requirements

Reporting Document	Function	Frequency	Responsible Authority
Inception Report	To review and sequence activities and, if necessary, to reorganize the project or program work plan and implementation schedule.	At commencement of the project	Program Manager
Mid-term Evaluation	A preliminary evaluation that measures and reports on performance to date and recommends adjustments (activities and outputs) that may need to be made to ensure the successful implementation of the project.	At mid-point of the project/program implementation (i.e. 6 months after start)	Project Managers
Annual Performance Report (APR)	Records the status of implementation of each project activity, updates achievement indicators against targets and identifies implementation-related problems and mitigation measures. This includes a narrative report, accompanied by supporting qualitative and quantitative data as needed submitted in the funding proposal that specifies project component outputs, outcomes and activities. The APR shall also indicate challenges or problems (if any) encountered during implementation, as well as identifying lessons learned.	Yearly and final	Program and Project Managers
Final Evaluation	To measure the overall impact, effectiveness, efficiency, sustainability, replicability and lessons learned of a project/program.	Upon completion of the project	Program Team
Yearly audits and financial information	Regular financial reports and yearly/final financial statements.	On annual basis	Executive Director, Program Manager

#### 4.4. Environmental and Social Management Policy

The Belize Constitution provides the primary policy direction on the environment, with its preamble that states that “the people of Belize require policies of state which ... protects the environment, promotes cooperation among nations and respect for international law and treaty obligations”.

The Environmental and Social Management Plan (ESMP) establishes the environmental and social impacts of projects, programs and proposed activities. The overall objective of environmental and social monitoring is to ensure compliance with the Government of Belize

in line with the SDGs and ensure that mitigation measures are implemented and are effective. Environmental and social monitoring will also enable response to new and developing issues of concern during the project implementation hence ensuring that project activities comply with and adhere to environmental provisions and standard specifications of the country of Belize.

The specific objectives of ESMP are: (i) to establish clear procedures and methodologies for the environmental and social screening, planning, review, approval and implementation of projects and programs; (ii) to specify appropriate roles and responsibilities, and outline the necessary reporting procedures, for managing and monitoring environmental and social concerns related to projects and programs; (iii) to determine the training, capacity building and technical assistance needed to successfully implement the provisions of the ESMP; (iv) to propose and establish the funding required to implement the ESMP and subsequent environmental and social assessments, monitoring and management; and, (v) to provide practical information resources for implementing the ESMP. (MoA, Eritea, 2018)

The overall responsibility of ensuring adherence to the environmental and social monitoring will lie with the Project Management Office of BETRAIDE through collaboration with relevant ministries including the Department of Environment and the Ministry of Human Development. Using guidance and expertise from the Caribbean community Climate Change Center (5Cs) and other such agencies, the PMO will also ensure adherence prior to project approval and throughout its execution.

The PMO will ensure regular reporting, which will be on a monthly, quarterly, or annually basis depending on the specific program and its longevity. This will help to avoid any serious environmental challenges and ensure that solutions are quickly developed should there be any problems. Because of the relationship that BELTRAIDE has with the Government of Belize and other local and international stakeholders, especially those who fund projects, the ESMP will also safeguard the policies that these other entities have for their environmental and social requirements.

The following will present the reporting requirements corresponding to the level of environmental and social risks and impacts of funding proposals that are led or proposed to be led by BELTRAIDE.

Chart 10: Environmental and Social Management Plan (ESMP).

The table below provides the summary of the project impacts and the intended mitigation measures

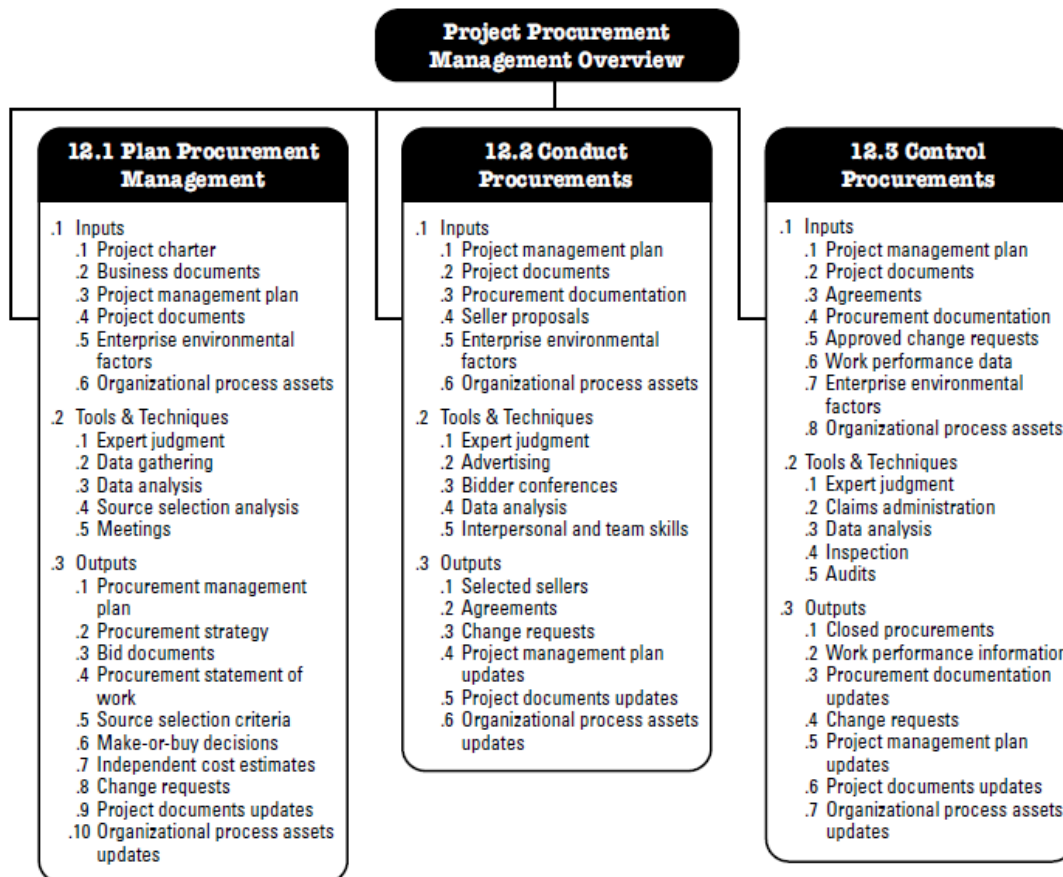
Phase	Impacts Identified	Nature of impact (negative/positive)	Duration of impact	Scope of impact (local, regional or global)	Level of risks associated with the impacts (See Pxi)	Proposed mitigation measures	Capacity building required	Reporting Frequency	Responsibility
Development	Occupational health & Safety hazards	-	3 months	Local	Medium	Use of proper construction gears and adherence to safety procedures	Training in construction safety and first aid procedures	Monthly	Human Resources
	Environmental Challenges	-	Short term, for duration of construction	Local	Medium	Purchase of environmentally safe materials	Training in proper waste disposal methods	Monthly	Executive Director/ Department of Environment
	Employment Opportunities	+	3 months	Local	Low	Not required	Employ skilled labor	Quarterly	Executive Director/ Human Resources
	Noise Pollution	-	Short term base on construction	Local	High	Working after hours and weekends	None	Monthly	Department of Environment
	Delays	-	Base on construction time	Local, regional or international	Medium	Find a temporary location to house displaced staff	None	Monthly	Projects Unit
Operational	Employment Opportunities	+	Long Term	Local	None	Not required	Hire skilled staff	Yearly	Executive Director/ Human Resources
	Public awareness & knowledge	+	Long Term	Local, regional or international	None	Not required	Informational sessions with stakeholders	Quarterly	Marketing & Communications Unit
	Improved knowledge base and support for women other vulnerable groups	+	Long Term	Local	None	Not required	Training development programs & funding agency requirements geared towards women, youth and vulnerable communities	Yearly	Projects Unit
	Developed entrepreneurial skills	+	Long Term	Local	None	Not required	Training in entrepreneurship development	Yearly	Technical Units/ Projects Unit
	Greater access to finance	+	Base on availability of funds	Local	None	Not required	Knowledge of different project financing available by local, regional and international agencies	Quarterly	Projects Unit
	Enhanced Export Capabilities	+	Long Term	Local, regional or international	None	Not required	Market Intelligence training	Yearly	Technical Units/ Projects Unit
	Greater Promotion for Investments	+	Long Term	Local, regional or international	None	Not required	Knowledge of local, regional and international investment portfolios	Yearly	Technical Units/ Projects Unit
Institutional Strengthening	Improved knowledge base	+	Long Term	Local, regional or international	None	Not required	PMO policies training	Yearly	Technical Managers
	Enhanced staff capabilities	+	Long Term	Local, regional or international	None	Not required	None	Yearly	Technical Managers
	Increased access to funding	+	Med- Long Term	Local, regional or international	None	Not required	MREF or Policy per funding agency	Quarterly	Projects Unit
	Improved credibility	+	Long Term	Local, regional or international	None	Not required	Reporting policies	None	None
	Greater Collaboration with GOB Ministries	+	Log Term	Local, regional or international	None	Not required	Knowledge of programs for collaboration	Yearly	Executive Director

#### 4.5. Procurement Policy

Project procurement is one of the processes that is critical in Project Management, particularly due to the significant legal obligations and penalties that can be tied to the procurement process. According to PMI (2017), Project Procurement Management is the knowledge area that includes the processes necessary to purchase or acquire products, services or results needed from outside the project team. It includes the management and control processes required to develop and administer agreements such as contracts. In the development of a procurement policy for the PMO of BELTRAIDE, the processes from the PMI will be used, which are (*See Figure 23*):

**Plan Procurement Management:** According to PMI (2017), procurement management is a process necessary for the acquisition of products or services needed for a project. Plan Procurement Management is the process of documenting project procurement decisions, specifying approaches and identifying potential sellers. A Procurement Management Plan establishes the procurement framework for a project. It is used to guide the process of purchasing goods or services on the project and is updated based on the needs of the project. It also helps project teams identify what needs to be purchased, the contracts that support the purchases, the process for approving a contract, and the decision criteria. The Plan facilitates procurement management and allows project teams to make more effective use of project resources which ultimately reduces the costs needed to support the project.

Figure 23:  
Project Procurement Management Overview



*Note.* This figure shows the project procurement management overview from the PMBOK, 2017.

**Conduct Procurements Analysis:** Analysis according to PMI (2017) is the process of obtaining seller responses, selecting a seller, and awarding a contract. The key benefit of this process is that it selects a qualified seller and implements the legal agreement for delivery. The end results of the process are the established agreements including formal contracts.

**Control Procurements Analysis:** PMI (2017) defines Control Procurements as the process of managing procurement relationships, monitoring contract performance, and making changes and corrections as appropriate; and closing out contracts. This third and final procurement process ensures that the buyer and



seller are aware of what their responsibilities are and act to ensure that “both parties meet their contractual obligations and that their own legal rights are protected” (PMI, 2017). This process falls in the monitoring and evaluation group so it requires the Project Manager to monitor performance based on what was contracted even though adjustments to the contracts can be made during this time.

These processes will be implemented to develop a Procurement Plan that will be the template used by BELTRAIDE. It will not only apply in this instance to the procurement necessary for the development of the PMO, but the project procurement plan (See Appendix 6) may also be used as a matrix for future projects or programs.

### **Managing Procurement Risks**

Key in the Procurement Management process is the identification of risks that may present themselves during the phases i.e., plan, conduct, and control. Once these risks are identified, they are assessed, and mitigation controls/measures are put in place to minimize risk to the lowest level reasonably practicable.

There is not a huge risk overall for the development of the PMO for BELTRAIDE as a Projects Unit already exists for the organization. The increase in the scope of work for the organization may pose some risks as this will require the approval of the Government of Belize to determine whether BELTRAIDE will be a good fit to lead majority of the projects and programs. Once that hurdle is crossed the risks that will then be posed are centered around procurement in relation to three processes.

For the development of the PMO, there are various risks that have been identified. Additionally, some of these risks can also be used as a measuring stick in the development of projects and programs for the PMO.

A probability and impact scale will be used to determine the impact that each risk may have on the project. Every project's context is specific to the definition of the risk probability and impact levels that reflect the risk appetite and thresholds of the organization and key stakeholders (PMI, 2017). Both probability and impact are important when identifying and analyzing risks in the project. Probability expresses whether an event (risk or opportunity) will occur, and it ranges from 0% (does not occur) to 100% (occurs certainly). Subsequently, impact describes the possible damage (or benefit) when a risk (opportunity) occurs (Wanner, 2013).

For this project, the range for the probability matrix would be from 1 (unlikely to occur) to 3 (likely to occur) and the scale will also be used for the impact from low chances of impacting the project to the highest chances. This matrix will then be used for the risk register that lists the different risks, the possible consequences for them, the response and the owner.

Chart 11: **Probability and Impact Risk Matrix**

		Threats		
		Low 1	Medium 2	High 3
Probability	Likely to occur: 3	3	6	9
	May or may not occur: 2	2	4	6
	Unlikely to occur: 1	1	2	3
		Negative Impact on Project		

Chart 12: Risk Management Plan

Phase	Identified Risk	Likely Consequence	Risk Response	Probability	Impact	Pxl	Risk Owner
Plan	Misinterpretation or lack of understanding of needs	Procurement of unsuitable product or service	Reevaluate to ensure that the specifications are clear	1	2	2	Procurement Officer
	Inadequate Statement of Work	Variety of offers not meeting needs	Ensure that the specifications are consistent with the needs analysis	2	3	6	Project Manager
	Unrealistic timeframe	Lack of quality responses from bidders	-Prepare an Expression of Interest with enough time -Share EOI with database of known sellers/ consultants	2	2	4	Project Manager
	Insufficient funding	Delayed Project	Obtain appropriate approvals and details on funding to be made available	2	3	6	Project Sponsor/ Project Manager
	The Board of Directors do not support the development of the PMO	Project closes or does not begin	Accept the risk and continue working with resources already in place	1	3	3	Executive Director
	Government of Belize does not support BELTRAIDE as the leading PMO for the country	PMO stalled	Accept the Government's decision and enable BELTRAIDE to continue developing the PMO for its projects/programs	2	2	4	Executive Director
	Integrity issues	- Project or Program recalled from organization - Unqualified cronies given contracts	Implement organization's best practice that governs ethics and conflict of interest	2	2	4	Project Owner
Conduct	Improper verification method	Having to provide clarifying information, causing delays in tender closing	Ensure that staff are qualified and have the appropriate knowledge to complete relevant documentation	1	2	2	Procurement Manager
	Insufficient responses or qualified potential sources	Expense to undertake the procurement process again	Open procurement to regional sellers/bidders	2	3	6	Program Manager
	Unacceptable bidder terms and conditions	Withdrawal of offers	Review all the appropriate documents and ensure that they are accurate for the type of procurement i.e., service or product	2	3	6	Procurement Manager
	Inadequate information on invoices or offers	Cost variations that may affect the budget	Carefully and frequently review tender documents before preparing relevant documentation	2	2	4	Procurement Manager
	Failure to adequately address inquiries	Delay in the project/ program	Ensure that all inquiries are immediately responded to and create log of inquiries for the procurement process	2	3	6	Program Manager
	Breach of confidentiality	Bidders raise concerns on the procurement process requiring the process to restart	Establish security procedures and ensure that staff and sellers/bidders are updated with all pertinent information	2	2	4	Executive Director
	Environmental/ weather effects	Delay in the project/ program	Center project activities, where possible around the country's dry season and where not possible add contingency days to the project	2	2	4	Program Manager
	Legal challenges by unsuccessful bidders	Claims of unfair practices that may open door for lawsuits	Ensure that the appropriate tender methods and evaluation criteria is used and that necessary information is clearly shared	2	3	6	Executive Director
	Failure to accept or reflect the terms offered and agreed in the contract	Contract disputes or loss of relationship with clients	Check and verify final drafts of contracts before signing and keep records of all conversations, negotiations and agreements	2	2	4	Executive Director

Control	Failure of either party to fulfill the conditions of the contract	-Delay in project completion - Possible legal action	Maintain good record keeping and confirm details of contracts through frequent meeting	1	3	3	Chief Executive Office/ Project Sponsor
	Inadequately administering the contract	- Contract disputes - Unsatisfactory delivery or product or service	Conduct frequent inspections, hold regular meetings to track progress and ensure approvals are received before progressing to next steps	1	3	3	Program Manager/ Executive Director
	Unauthorized increase in scope of work	Increase in cost of the project	-Ensure that all changes to the contract are recorded and any amendments are issued beforehand via writing and approved for organization - Record in change management log	1	3	3	Program Manager
	Failure to identify and address problems	Objectives not achieved or incomplete project	Agree on a performance criteria and ensure that there is good communication with suppliers	2	3	6	Program Manager
	Loss or damage to goods in transit	Project delays	-Ensure that all products are insured and perform inspection on delivery -Maintain backup supplier for lengthy delayed items	2	3	6	Procurement Manager
	Fraud	- Misuse of funding or resources - Cancellation of project	-Maintain ethical environment and chain of command with open communication -Ensure that the contract has strict clauses on fraud	1	3	3	Program Manager/ Executive Director
	Change in lead personnel	-Less expertise - Progress disrupted leads to downtime	-Ensure that within contract negotiation that there are contingencies in place if lead is unable to perform - Prepare to manage possible delays and have a proper communication and risk response in place to update stakeholders	2	2	4	Program Manager

Using expert judgment, risk identification was conducted in order to assess the probability of risk exposure and determine the best possible responses should that risk occur. Using probability and impact calculation, twenty-three (23) possible risks were identified and categorized by the phases. These risks were prioritized based on their probability of occurrence and impact on the project's objectives using the Probability and Impact Risk Matrix for the project, as well as the risk classification levels of high, medium, and low and then further mapped for risk exposure at each level in these categories. The results revealed that the greater occurrence of risks to the project will be found during the Conduct phase of the project. This is because majority of the work to be done will be dependent on external factors that will be harder for BELTRADE to control. The greatest challenge in the Plan phase is centered around having the finance necessary to develop the PMO and ensuring that a proper SOW is produced so that it can be accepted not only by the BOD of BELTRAIDE but also overall by the Government of Belize.

While there are very little other external risks such as weather conditions that cannot be managed by the Project Manager, mitigation strategies will have to be put in place of activities that can be controlled before project commencement. For the other risks identified after project start, and where able to control, the Project Manager must have a contingency plan to easily contain. Failure to do so will severely impact the life cycle of the project and more than likely lead to greater exposure of the employees and a higher project cost to the organization. The PMI framework provides awesome guidelines on how to address risk issues in both project opportunities and threats, to achieve greater success in projects.

#### **4.6. Recruitment and Training Policy**

To ensure that the PMO accomplishes its mission and remains high performing throughout its operations it is important that the staff receives the training and development that they need. While for the

implementation of this PMO at BELTRAIDE there is a need for new staff, those who are already at the organization and those joining must be trained in the fundamentals and principles of project management. Training and development for the PMO will focus on the knowledge, skills and competencies required to perform and progress the work of the organization measuring where each staff is and where they need to be. Each member of the PMO will be provided with training material on the following knowledge areas:

**PMO Framework:** The PMI's Pulse of the Profession: PMO Frameworks provides a standard that the PMO will be able to use to help employees understand the type of PMO BELTRAIDE will be using and the standards, methodologies and processes that guides performance. It will include a training manual for each functional area and how they integrate into the overall mission of the organization.

**Project Management:** The PMBOK will be the guiding document used to provide a standardized training manual on the project management approaches with a special emphasis on the use of the Agile approach. Staff will be trained in the tenets of the agile mindset and principles and workshops will be done in specific approaches such as Scrum and Kanban.

**PMO Tools:** A training manual will be developed for the project management related software that the PMO will be using. This includes Microsoft projects and/or JIRA which the organization currently needs and must move away from using Microsoft teams for the creation of projects.

**PMO Reporting:** Training will be done with all staff on the format to develop all required reports done by the PMO with regards to portfolios, programs, and projects inclusive of the procurement reports.

**Communication Standards:** With communication being one of the most important tools needed by the organization, a communications manual will be developed to indicate how to communicate with internal and external stakeholders, when it should be done (frequency or what prompts it) and who is to take the lead to communicate based on what is being communicated i.e. reporting, managing risks etc.

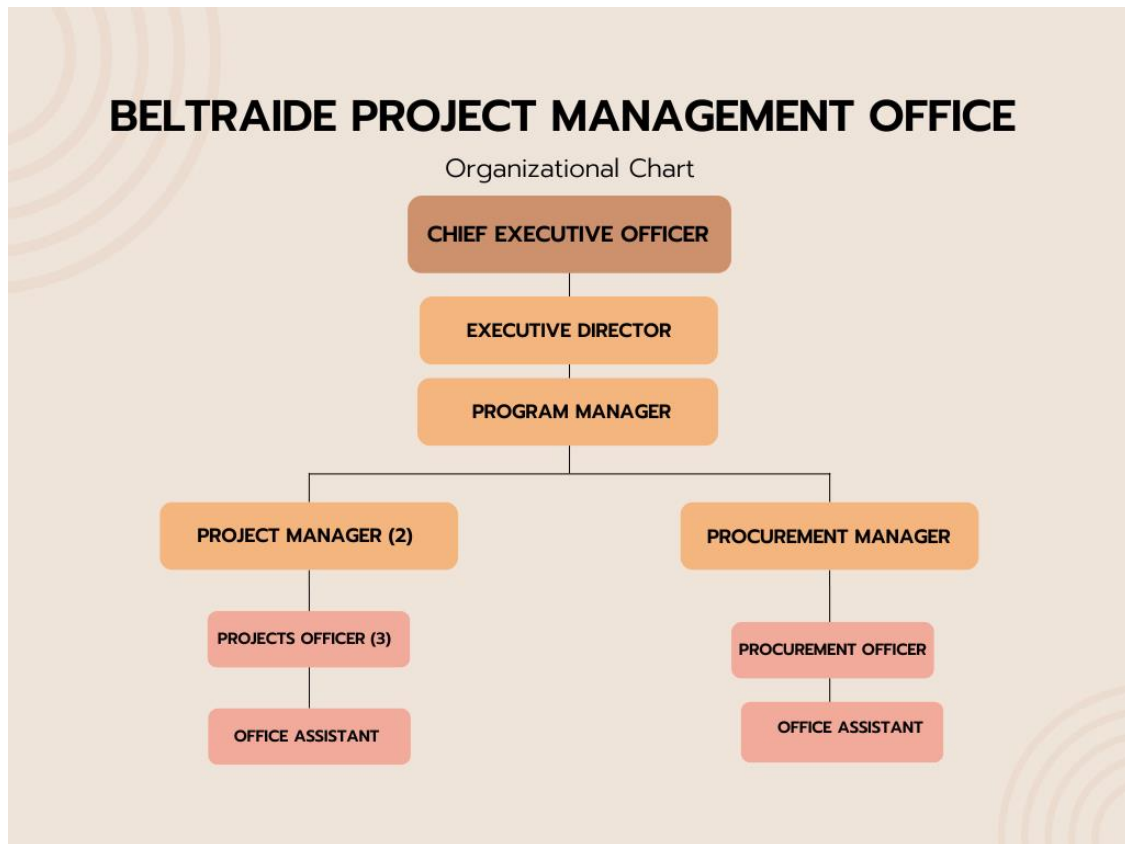
#### **4.7. Roles and Functions**

BELTRAIDE currently functions with two staff members in its projects Unit, a Senior Projects Officer and a Projects officer. These are the sole people who are responsible for the projects that come into the organization including the monitoring and evaluation. Because of the lack of human resources, several projects were not completed within the scope of the project causing the institution to start losing credibility.

According to Miller (2017) “a PMO makes sure company procedures, practices and operations go right — on time, on budget and all in the same way. PMOs are there to ensure project and program success, and that’s critical because organizations deliver value through projects and programs.”

If BELTRAIDE wants to regain its credibility it must, therefore, ensure that it has a functioning PMO that is able to ensure that “operations go right” leading to successful execution of the projects. To do so, new staff must be employed with the PMO. They include:

**Figure 24:**  
**BELTRAIDE PMO Organizational Chart**



*Note.* The figure, designed by the author shows the update to the organization structure in relation to the new staff additions for the PMO.

### **Chief Executive Officer:**

The current CEO of BELTRAIDE is Narda Garcia and she is responsible for devising and implementing operational plans. This is often done through the Executive Director but all final decisions with regards to the running of the organization will be channeled through her. With a Board of Directors, the CEO is responsible for the functioning of the entire organization including putting the big picture into perspective in line with the Government's Plan Belize. Oversees the ongoing operations of all divisions in the company.

### **Duties and Responsibilities**

- Manages and directs the organization toward its primary goals and objectives.



- Oversees employment decisions at the executive level of the organization.
- Leads Board of Directors towards major decisions including partnerships and agreements with other institutions and create objectives and long-term goals
- Promotes communication and cooperation among Board and management to create unity in the organization.
- Directs the team towards the creating plans and policies for the organization

### **Executive Director**

BELTRAIDE's current Executive Director, Leroy Almendarez is responsible for leading the overall mission of the organization by creating business plans, overseeing day-to-day activities, improving BELTRAIDE's performance and developing organizational culture. Additionally, he is responsible for supervising the other managers, reporting on revenue, and directing organizational strategy.

- Presents regular reports on the status of the company's operations to the board of directors and to company staff.
- Oversees the organization's financial structure, ensuring adequate and sound funding for the mission and goals of the company.
- Reviews the financial results of all operations, comparing them with the company's objectives and taking appropriate measures to correct unsatisfactory performance and results.
- Ensures the company's compliance with all applicable laws, rules, regulations, and standards.
- Negotiates with contractors, sellers and bidders for procurement activities.

## **Program Manager**

Currently, there is no Program Manager at BELTRAIDE and the creation of this post will help to alleviate some of the strain that is currently placed on the Senior Projects Manager. A program manager acts as a coordinator between multiple projects and ensures that they are aligned with overall organizational goals. They are different from project managers because they do not directly oversee individual projects.

- Organizing programs and activities in accordance with the mission and goals of BELTRAIDE
- Writing program funding proposals for prospective projects or programs for BELTRAIDE or the Government of Belize
- Evaluating programs to assess strengths, analyze risks and identify areas for improvement.
- Developing a budget and operating plan for programs.
- Creating and managing long-term goals and ensuring that they meet stakeholder requirements.
- Implementing and managing changes and interventions to ensure project goals are achieved.
- Producing accurate and timely reporting of program status throughout its life cycle.
- Meeting with stakeholders to make communication easy and transparent regarding project issues and decisions.
- Managing a team, especially project officers and program managers to ensure effectiveness.

## **Project Manager (3)**

Project Managers are generally responsible for the completion of an organization's most important projects, and as such, they need to have excellent leadership skills, coordination abilities, and motivational skills. "The project manager is the person assigned by the performing organization to lead the team

responsible for achieving the project objectives. The project manager’s reporting relationships are based on the organizational structure and project governance” (PMI, 2017).

- Ensure that the project team is staffed with procurement expertise at the level required for the project
- Coordinate the work, collaborate with stakeholders, solve problems, and make decisions
- Managing team schedule and ensuring they achieve their commitments to the project
- Estimate project cost and develop budget
- Review contracts to make sure that the team moves in accordance with the plan.
- Monitoring progress and tracking roadblocks
- Maintain records of project milestones and ensure that the project satisfies all the project requirements
- Oversee the progress of projects and prepare risks and change management documents

### **Procurement Manager**

“Project Procurement Management includes the processes necessary to purchase or acquire products, services, or results needed from outside the project team.” (PMI, 2017). The Procurement Manager takes the lead in sourcing the products and/or services needed by the organization. He/She negotiates with sellers and creates a buying strategy that takes into account the budget, quality of the materials and time to procure and find the best possible vendors.

- Forecast project/program needs and supplies and manage inventory
- Finalize purchase orders and delivery of products/service
- Find credible and competent suppliers and negotiate contracts with vendors and suppliers
- Draft, review and approve requests for proposals (RFPs)
- Collaborate with stakeholders to ensure expectations are met and there is clarity on needs

- Track and report key metrics to reduce expenses and improve effectiveness
- Performing risk assessments on the contracts and agreements

The **Project and Procurement Officers** will offer assistance to the managers to ensure that the work of the Project Management Office gets done. The overall goals of the unit will be captured in their day-to-day work and they will follow and enforce the organization's project and procurement policies and procedures.

The **Office Assistants** for the PMO will aide in entering, creating, and maintaining information into the PMO database and any other clerical duties or errands required for the office.

## 5 CONCLUSIONS

1. A Project Management Office (PMO) plays a vital role in an organization, and it is key to ensure project success. Using the Project Management Book of Knowledge (PMBOK) 6<sup>th</sup> edition, this will help guide the implementation of a PMO within BELTRAIDE as it relates to the ten knowledge areas. The Program Manager of the PMO will be essential in carrying out the most critical responsibilities from the initiation of the projects/program to their closure. With a strong and competent PMO team, the stakeholders will always be updated on the progress of the implementation and will be receiving all necessary reports on the progress and issues in the project.
2. Using the OPM3 framework, a maturity analysis assesses the readiness of the organization for the implementation of the PMO and using the three elements of knowledge, assessment, and improvement. The report also provided a SWOT analysis of the PMO based on the current projects unit that is place at the organization and found that with the implementation of the office, the organization will be able to meet its objectives and will be able to successful advocate to be the organization for projects and programs for the Government of Belize in relation to investments, trade, and entrepreneurship. The actions needed to improve the state of the Projects Unit to the PMO are feasible and will be beneficial for the organization.
3. The success of the PMO at BELTRAIDE will be highly dependent on firstly developing a strong implementation plan that details what the role of PMO will be. In the case of BELTRAIDE, the PMO will be the unit that ensures that the policies guiding the office are adhered to including those on procurement, communication, and monitoring, evaluation and reporting. This will ensure that

the organization will be able to carry out any projects or programs assigned to them meeting the Government of Belize's mandate under Plan Belize.

4. The Monitoring, Reporting and Evaluation Framework provides the guiding principles on proper monitoring and reporting that is needed to improve and maintain the reputation of the organization. These principles emphasize the importance of transparency, simplicity, integration with the ESMO, relevance to mandate and relevance to regional and national challenges. It is the basis for which BELTRAIDE will provide efficient reporting and auditing throughout each project and will henceforth be used as a tool to measure the annual performance of the PMO.
5. Furthermore, the ESMP will establish clear procedures and methodologies for the environmental and social screening, planning, review, approval and implementation of projects and programs. Guided by the GMP P5 standards, projects or programs must fulfil some type of regenerative dimension that ensures that no harm is done socially or environmentally. Additionally, as Belize has signed on to the SDGS, projects will capture some aspect of a goal towards the 2030 vision for the country.
6. To meet much of the ESMP and organizational goals, the procurement policy of BELTRAIDE will ensure that any product or service that is acquired meets the standards of the organization. Using expert judgment through the Plan, Conduct and Control phases, the Program or project manager will carefully ensure that quality products and services are being procured meeting the SOW. They will also identify possible risks within the procurement process and ensure that they are prepared to respond to them with the least possible impact on the development of the PMO during implementation and operation.

7. According to the needs analysis there is a need for new staff to join BELTRAIDE to tackle the quantity of work that needs to be completed. For this reason, the onboarding process is extremely important but there needs to be equal importance placed on acquiring the right, qualified talent. To efficiently implement the office new and current staff need to be trained on the role of the office and the various processes within the office inclusive of how communication will be channeled and what type of reporting templates will be used.
  
8. While the training will ensure that the PMO staff has the correct knowledge and training, it is imperative that there is clear establishment of the PMO within the overall BELTRAIDE organizational chart. The Program Manager will assume the same level of authority as the other technical managers of the organization and will report directly to the Executive Director. The Program Manager will be responsible for supervising the two other units within the office: the projects unit and the procurement unit.

## 6 RECOMMENDATIONS

1. It is recommended that the Board of Directors for BELTRAIDE conduct a strategic session that looks at the readiness of the organization for the implementation of the PMO and the importance of its establishment at BELTRAIDE.
2. BELTRAIDE's Senior Projects Officer should develop plans that clearly states the guidelines for the operation and implementation of the PMO inclusive of the communication methods that will be used.
3. It is necessary for BELTRAIDE's Executive Director to develop a comprehensive monitoring and evaluation policy that will be used to guide the PMO and provide updates and reports to stakeholders within specific projects and programs.
4. A key recommendation is that BELTRAIDE'S CEO reviews the Government of Belize's existing Environmental and Social Policy and develop one for the organization that will be aligned with the GoB's.
5. It is recommended that BELTRAIDE's Senior Projects Officer review the organization's current procurement policy and update to be aligned with the Government's so that they meet the necessary standards for all relevant stakeholders and so that it has clear communication and risk response guidelines.
6. BELTRAIDE's Executive Director should evaluate the qualifications of the current staff and initiate the recruitment process internally for the Program Officer and start external recruitment process for other roles within the PMO structure that will be key in guiding the implementation process.



7. It is recommended that the selected Program Officer will guide the development of training and communication materials for the organization and develop an implementation system that will guide the phases of the PMO development to meet organizational objectives.
8. It is recommended that the Executive Director communicate with all staff of BELTRAIDE on the development of the PMO and its place within the organizational structure, its functions, authority, and designations of each member within the office.

## 7 VALIDATION OF THE FGP IN THE FIELD OF REGENERATIVE AND SUSTAINABLE DEVELOPMENT

In recent years, more emphasis has been placed on the importance of sustainable development and in 2015 193 Member States of the United Nations unanimously adopted the Sustainable Development Goals, new global agenda to end poverty by 2030 and pursue a sustainable future. By making the decision to pursue sustainable governments are making the decision to be accountable, fair, transparent, and responsive to stakeholders. It means that they will be making all efforts to do good by all involved. According to the GPM Reference Guide on Sustainable Project Development (2018) “Corporate governance also provides the structure through which the objectives of the company are set, and the means of attaining those objectives and monitoring performance are determined.”

**Figure 25**  
UN Sustainable Development Goals



*Note.* A huge part of the projects coming out of the country must fall within the UN’s Sustainable Development Goals and the figure, retrieved from UN, 2022 website.

In sustainability projects, organizational governance has a huge role in determining not only the success of the project but also the impact that it may have on a community or country whether good or bad. If organizational governance is poor there are several ways that it may impact a community including the improper procurement of materials and the unscrupulous project management processes. When good organizational governance is practiced there are also more chances that organizations can get funding to help develop projects that will lead to improving the livelihood of their stakeholders.

Regenerative Development “is the use of resources to improve society's wellbeing in a way that builds the capacity of the support systems needed for future growth” (Gabel, 2015). UCI, 2019 has listed 6 main areas in which regenerative development can be applied to improve our lives on earth and maintain the earth for the generations to come.

**Figure 26:**  
**Regenerative Development Main Areas**



*Note.* A key aspect of projects is ensuring that they fall within the regenerative aspect as shown within the regenerative development figure with the different groups (UCI, 2019).

Regeneration seeks to promote a more resilient environment that can withstand natural challenges. The key difference between regenerative and sustainable programs are being proactive versus reactive.

Regenerative programs have three primary goals:

- increase health of human and natural environments
- foster positive feedback loops
- respect to local contexts (Riley, 2021)

The Sustainable Development Goals (SDGs) and Social Regeneration is about finding ways to improve our lives on earth through the preservation of human life and the earth. Projects are often developed in hopes of meeting the goals of both these areas not only because they often stand a better chance to get funding but because they recognize the importance of having the participation of our most vulnerable populace.

The FGP will present a PMO that will be a champion of Regenerative and Sustainable Development through the projects that are being channeled to the institution. As the government's PMO, it must be cognizant of the global requirements and the contributions that must be made when planning and executing projects. Project sustainability and in extension, regeneration, involves both individual and organizational responsibility "to ensure that outputs, outcomes and benefits are sustainable over life cycles and during their creation, disposal and decommissioning" (APM, 2019). Incorporating these methodologies into its project management strategy, the positive outcomes create a ripple effect throughout the organization and throughout communities.

The SDGs are targets for global development that are set to be achieved by 2030 and consists of an SDG Tracker that presents data across all available indicators within their database. This database can provide an overall picture of Belize's performance in achieving the SDGs. However, the organization will be using

charts and graphs from data collected from surveys and interviews with participants and beneficiaries which will indicate the impact of the projects on their livelihoods. The FGP addresses SDGs in relation to Gender Equality, Decent Work and Economic Growth, Quality Education and others.

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## Appendix 1: FGP Charter

### CHARTER OF THE PROPOSED FINAL GRADUATION PROJECT (FGP)

1. Student name

Nikki S. Augustine

2. FGP name

Development of a Project Management Office at the Belize Trade and Investment Development Service (BELTRAIDE) that meets the PMI's standards to facilitate the Government of Belize's increased demand on organization as project management leads.

3. Application Area (Sector or activity)

Government (Trade and Investment)

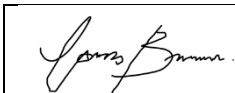
4. Student signature



5. Name of the Graduation Seminar facilitator

Prof. Carlos Brenes

6. Signature of the facilitator



7. Date of charter approval

July 31, 2022

8. Project start and finish date

July 18, 2022

December 18, 2022

9. Research question

How can the Government of Belize through BELTRAIDE benefit from a PMO developed in accordance with the PMI Guidelines?

#### 10. Research hypothesis

Is it necessary to implement a Project Management Office within BELTRAIDE that will meet the needs of the Government of Belize in line with their Plan Belize?

#### 11. General objective

To develop a Project Management Office (PMO) within BELTRAIDE that will ensure the successful execution of the Government of Belize's projects in investments, trade and Micro, Small, and Medium Enterprises (MSMEs) development.

#### 12. Specific objectives

1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.
2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.
3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)
4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.
5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual
6. To recruit ideal personnel (where necessary) and train and sensitize existing staff on the new institutionalized project management system and associated procedures (i.e., training manual, procurement manual, fiduciary policies, etc.)
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.

#### 13. FGP purpose or justification

The BELTRAIDE is the statutory body under the Office of the Prime Minister and Ministry of Economic Development and Investments. BELTRAIDE mission is based upon four main pillars: (i) Promotion of Foreign Direct Investment, (ii) Development of Export Capacity, (iii) Facilitation of Small and Medium Enterprise Development, and

(iv) the advancement of Employment Training in Belize. As such it is responsible for planning and coordinating several initiatives in line with the Government of Belize's Plan Belize for the clients of BELTRAIDE and for entrepreneurs in the country. In the last audited 5 years (2015-2020) the organization has brought in over BZ\$900M in capital investments and secured \$200M for social projects. These initiatives are often funded by international donor agencies who offer funding to support small businesses especially those for women, youth, and other vulnerable communities.

BELTRAIDE presently employs two people who are responsible for finding funding opportunities and drafting the project proposals that are necessary for the country to receive that funding. As is currently, the Government does not have a project management office and institutions are left to search for funding on their own. This often cause duplication of efforts or competing for similar funding when the better option would have mean combining efforts. Additionally, there has been times when lack of staff has led to the institution losing funding because of inability to meet deadlines. There is currently over BZ\$50 million in funding from Taiwan, UNDP, IDB and the World Bank that the government must utilize or risk losing which a PMO will help to secure.

The PMO at BELTRAIDE will serve as the GOB's PMO when it comes to investments, trade and entrepreneurial development which are key to the government's plan. A full team office will ensure that the country benefits from the numerous funding opportunities that are available from international partners and that they are able to then assist in the social and economic development of the country. Most importantly, by employing project managers with Green Project Management Certification will ensure that they are adhering to the SDGs which is important to the Plan Belize Manifesto.

14. Work Breakdown Structure (WBS). In table form, describing the main deliverable as well as secondary, products or services to be created by the FGP.

## 1. FGP

### 1.1 FGP profile

#### 1.1.1 Introduction

#### 1.1.2 Theoretical framework

#### 1.1.3 Methodological framework

#### 1.1.4 Preliminary bibliographical research

#### 1.1.5 Annexes (FGP schedule, FGP WBS, FGP Charter)

### 1.2 FGP development

#### 1.2.1 Institutional and Capacity Needs

##### 1.2.1.1 Existing capacities, strengths, and way forward

##### 1.2.1.2 Maturity Analysis

##### 1.2.1.3 Institutional structures, leadership, and management

##### 1.2.1.4 Human resources and professional development

##### 1.2.1.5 Communication, coordination, and planning

#### 1.2.2 Implementation Plan and Project Management Manual

##### 1.2.2.1 Project identification'

##### 1.2.2.2 Project Appraisal

##### 1.2.2.3 Project Preparation

- 1.2.2.4 Project Oversight and Control
  - 1.2.3 Monitoring and Evaluation Functions and Procedures
    - 1.2.3.1 M&E policy and templates
    - 1.2.3.2 Manual of Procedures
  - 1.2.4 Environmental and Social Management Policy
    - 1.2.4.1 Environmental and Social objectives and Principles
    - 1.2.4.2 Environmental and Social standards and guidelines
    - 1.2.4.3 Procedure for identifying ESS risks and impacts using P5 Analysis
    - 1.2.4.4 Gender policy
  - 1.2.5 Fiduciary Policies
    - 1.2.5.1 Summary of procurement method
    - 1.2.5.2 Evaluating bid criteria
    - 1.2.5.3 Contract management
  - 1.2.6 Training Manual
    - 1.2.6.1 Overview of the training strategy and plan
    - 1.2.6.2 Thematic area 1: personnel recruitment
    - 1.2.6.3 Thematic area 2: project management systems
    - 1.2.6.4 Thematic area 3: monitoring and evaluation functions
    - 1.2.6.5 Thematic area 4: ESS management systems
    - 1.2.6.6 Thematic area 5: procurement and tender procedures
  - 1.2.7 Organizational Structure
    - 1.2.7.1 Organizational Chart
    - 1.2.7.2 Roles and Functions
  - 1.2.8 Conclusions
  - 1.2.9 Recommendations
  - 1.2.10 Reference lists
  - 1.2.11 Annexes
  - 1.2.12 Tutor approval for reading.
- 1.3 Reader's review.
- 1.4 Board of examiners evaluation.

FGP Budget			
Description	Quantity	Cost	Total
<b>1. Travel &amp; Accomodations</b>			
1.1 Travel to other government offices under the OPM	4	\$150.00	\$600.00
1.2 Accomodations	3	\$325.00	\$975.00
1.3 Food	4	\$75.00	\$300.00
		<b>Total:</b>	<b>\$1,875.00</b>
<b>2. Research</b>			
2.1 Purchasing & Printing of Materials	10	\$200.00	\$2,000.00
2.2 Interviews (Incentives)	3	\$50.00	\$150.00
		<b>Total:</b>	<b>\$2,150.00</b>
<b>3. Human Resources</b>			
3.1 Driver	3	\$150.00	\$450.00
3.2 Assistant	3	\$500.00	\$1,500.00
		<b>Total:</b>	<b>\$10,000.00</b>
Subtotal			\$14,025.00
Contingency		10%	\$1,402.50
<b>TOTAL</b>			<b>\$15,427.50</b>

#### 16. FGP planning and development assumptions

1. The FGP has the support of the Board of Directors of BELTRAIDE and the GOB
2. The Human and Financial resources exist to complete the development of the FGP
3. The FGP will meet the standards of the PMI without any major issues
4. The FGP will be in line with the SDGs
5. The FGP will be completed within the timeline dedicated
6. Other agencies will provide support for FGP Completion

#### 17. FGP constraints

1. The weekly time allocated for FGP deliverables is too short for interviews
2. The team lacks the knowledge to provide materials needed for research
3. The GOB lacks the financing to provide support for the FGP
4. The FGP does not meet the GOB standards

## 18. FGP development risks

1. Confidentiality in the government might result in the lack of information being provided therefore the data might not accurately reflect need.
2. The changes in leadership of the institution might lead to the FGP importance or relevance not being seen.
3. If the data is not provided in a timely manner the FGP will not be able to be completed within the deadlines of UCI.
4. If COVID-19 or any similar health situations occur, it may create a delay in FGP completion.
5. Termination of contract before completion of FGP will result in inability of information to complete FGP

## 19. FGP main milestones

<b>Deliverable</b>	<b>Estimated Start Date</b>	<b>Estimated Completion Date</b>
<b>1. Graduation Seminar</b>		
1.1 FGP Deliverables	7/18/2022	9/4/2022
1.2 Graduation Seminar approval	9/5/2022	9/11/2022
<b>2. Tutoring process</b>		
2.1 Tutor (Assignment & Communication)	9/12/2022	9/18/2022
2.2 Adjustments of previous chapters (If needed)	9/19/2022	9/25/2022
2.3 Charter IV. Development (Results)	9/26/2022	10/2/2022
2.4 Chapter V. Conclusions	10/3/2022	10/9/2022
2.5 Chapter VI. Recommendations	10/10/2022	10/16/2022
<b>3. Reading by reviewers</b>		
3.1 Reviewers assignment request	10/17/2022	10/29/2022
3.2 Reviewers work	10/31/2022	11/12/2022
<b>4. Adjustments</b>		
4.1 Report for reviewers	11/13/2022	11/19/2022
4.2 FGP update	11/20/2022	11/26/2022
4.3 Second review by reviewers	11/27/2022	12/3/2022
<b>5. Presentation to Board of Examiners</b>		
5.1 Final review by board	12/18/2022	12/23/2022
5.2 FGP grade report	12/25/2022	12/30/2022

## 20. Theoretical framework

### 20.1 Estate of the “matter”

The BELTRAIDE serves as Belize’s national Investment Promotion Agency, and Export and Trade Promotion Agency, and is focused on Micro, Small and Medium Enterprise (MSME) Development, Innovation, Entrepreneurship, and delivery of industry specific training. These functions are carried out by the four sub-units of BELTRAIDE namely: (1) BelizeINVEST, (2) EXPORTBelize, (3) Small Business Development Centre (SBDCBelize), and (4) Belize Training and Employment Centre (BTEC). The administrative and corporate functions are also complemented by the Marketing and Information Unit, a Projects Unit, an Information Technology Unit, a Finance Unit as well as Administration and Human Resources.

The inability of the organization to properly execute projects has become a concern to stakeholders with the primary reason for the challenge being lack of human resources.

The Projects Unit of BELTRAIDE will be the main unit in which this research will be carried out. The goal is to look at the systems in place in the procurement of projects and measure how impactful they are to the organization. Additionally, the research will determine the need to integrate sustainability into the Projects Unit/ Project Management Office. This integration is key as studies have shown that “the integration of sustainability into project management and sustainable project management is considered one of the most important global project management trends today” (Silvius, 2021).

### 20.2 Basic conceptual framework

BELTRAIDE  
 Project Management  
 Project Management Office (PMO)  
 Risk Analysis  
 Environmental Impact Assessment (EIA)  
 Procurement Policy  
 Monitoring & Evaluation Policy  
 Gap Analysis  
 Human Resource Plan  
 P5 Analysis  
 Sustainable Development Goals

## 21. Methodological framework

<b>Objective</b>	<b>Name of deliverable</b>	<b>Information sources</b>	<b>Research method</b>	<b>Tools</b>	<b>Restrictions</b>
1. To conduct a maturity analysis in order to identify the organizational needs and identify its readiness for a PMO, strengths and identify any necessary improvements for an implementation plan.	Maturity Analysis Report inclusive of a needs assessment to determine organizational readiness	Interview with the members of staff and BELTRAIDE policy documents	Descriptive: Use of surveys and interviews  Analytical: Critical thinking  Quantitative: Tables and graphs	Brainstorming, checklists, focus groups, interviews, market research, questionnaires, and surveys (google Forms)	Government policies or political influences that directly oppose the aim of the project.  Timely identification of suitable consultant/consulting firm
2. To develop an Implementation plan and Project Management Manual for BELTRAIDE that includes clear guidelines and templates for the various processes within the Project Management cycle and the steps to ensure adherence to plan.	Implementation plan inclusive of a project management plan	Staff surveys and workshops and using current PMI material and BELTRAIDE policy documents	Descriptive: Surveys and focus groups  Analytical: Data gathering	SWOT analysis, Market research, focus groups, interviews, cost-benefit analysis	Government policies or political influences that directly oppose the aim of the project.  Slow uptake and adoption of new policies and guidelines by staff.  Timely identification of suitable consultant/consulting firm.



<p>3. To develop an institutionalized Monitoring and Evaluation policy, function, and procedure (i.e., written policy, procedural manual, template for monitoring, evaluating, and reporting)</p>	<p>Monitoring and Evaluation Policy and Procedural Manual</p>	<p>Interviews and stakeholder meetings and organizational policies and manuals</p>	<p>Descriptive: Research Analytical: Critical thinking Quantitative: Tables and charts</p>	<p>Histograms, Feedback, presentations</p>	<p>Government policies or political influences that directly oppose the aim of the project.  Slow uptake and adoption of new policies and guidelines by staff.</p>
<p>4. To develop an Environmental and Social Management policy aligned with the regenerative development dimensions of the GPM P5 Standards.</p>	<p>Environmental and Social Management Policy</p>	<p>Journal articles including the GPM P5 Standards for Project Management</p>	<p>Descriptive: Surveys and interviews Analytical: Analysis of journal articles Quantitative: Diagrams and reports</p>	<p>Market research, statistical sampling (SIB), surveys (google forms) and questionnaires</p>	<p>Government policies or political influences that directly oppose the aim of the project.  Slow uptake and adoption of new policies and guidelines by staff.  Timely identification of suitable human resources  Limited technical capacities, resources, and knowledge</p>

					to design, implement and maintain Environmental and Social systems.
5. To develop Fiduciary Policies that includes a procurement and tender policy and a procedure manual	Procurement Policy	Interviews with organizational statistic that measure what is in place which will be guided by reviews of laws and regulations governing procurement	Descriptive: Research Analytical: Data gathering Quantitative: Graphs and charts	Brainstorming, market research, interviews, risk data quality assessment	Government policies or political influences that directly oppose the aim of the project.  Slow uptake and adoption of new policies and guidelines by staff.  Timely identification of suitable.
6. To recruit ideal personnel (where necessary) and train and sensitize existing staff on the new institutionalized project management system and associated procedures (i.e., training	Training Manual with method and necessary capacity building needed for the PMO team	Interview of personnel to determine fit and suitability along with training that may be necessary. This will be used with the organization's TOR for each position	Descriptive: Surveys and Interviews Analytical: Critical thinking and evaluation Quantitative: Graphs and charts	Observation/conservation, teambuilding exercises, performance appraisals	Slow uptake of capacity building and guidelines by staff.  Government policies or political influences that directly oppose selection of suitable candidates for training.

manual, procurement manual, fiduciary policies, etc.)					
7. To identify the PMO's level of authority, power within the organizational structure and determine its roles and functions.	Updated organizational chart showing the PMO's position	Organizational charts and structures currently in place.	Descriptive: Research Analytical: Critical thinking Quantitative: Diagrams and charts	Organizational charts, structured Interviews	Upper management will accept the level of PMO placement within the organization  Slow approval by the Board of Directors on the PMO

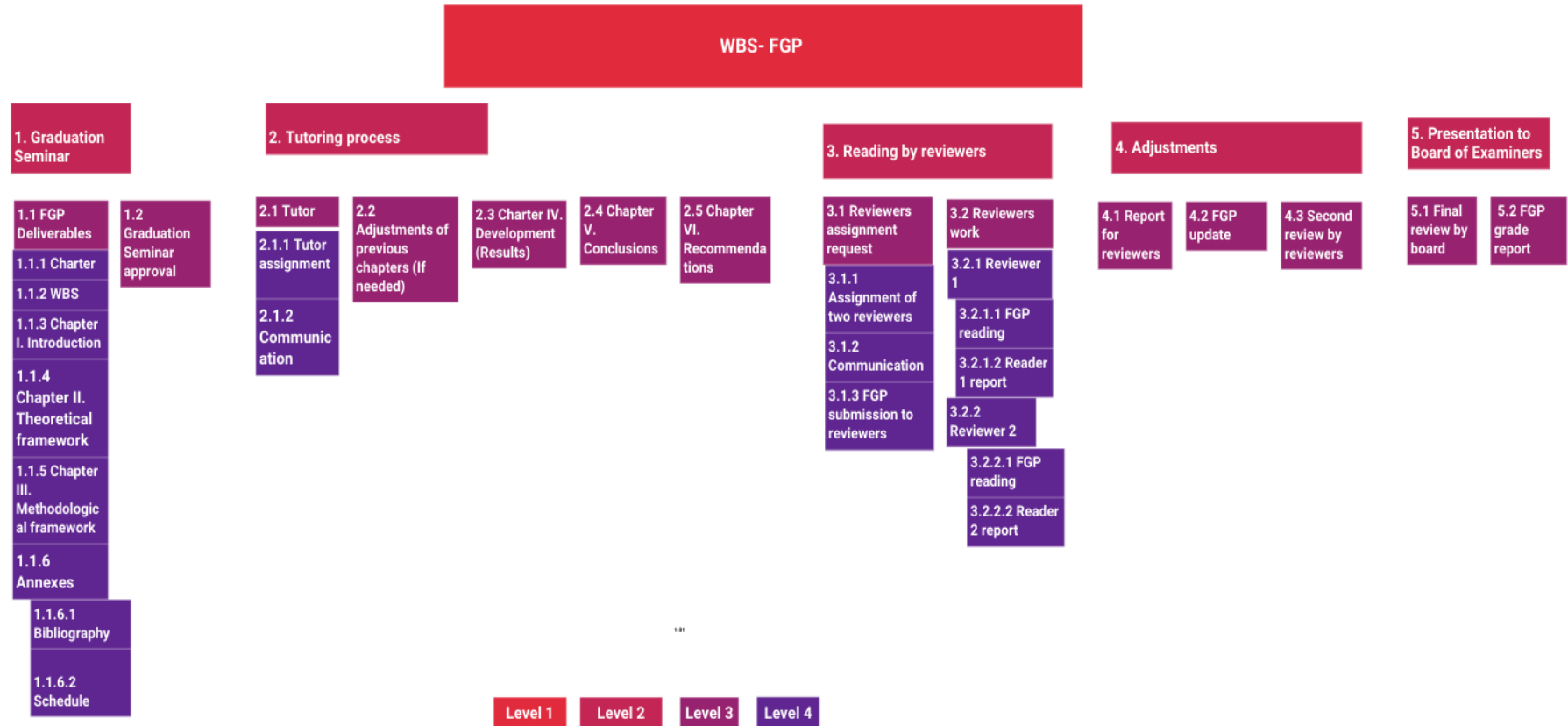
## 22. Validation of the work in the field of the regenerative and sustainable development.

The FGP will present a PMO that will be a champion of Regenerative and Sustainable Development through the projects that are being channeled to the institution. As the government's PMO, it must be cognizant of the global requirements and the contributions that must be made when planning and executing projects. Project sustainability and in extension, regeneration, involves both individual and organizational responsibility "to ensure that outputs, outcomes and benefits are sustainable over life cycles and during their creation, disposal and decommissioning" (APM, 2019). Incorporating these methodologies into its project management strategy, the positive outcomes create a ripple effect throughout the organization and throughout communities.

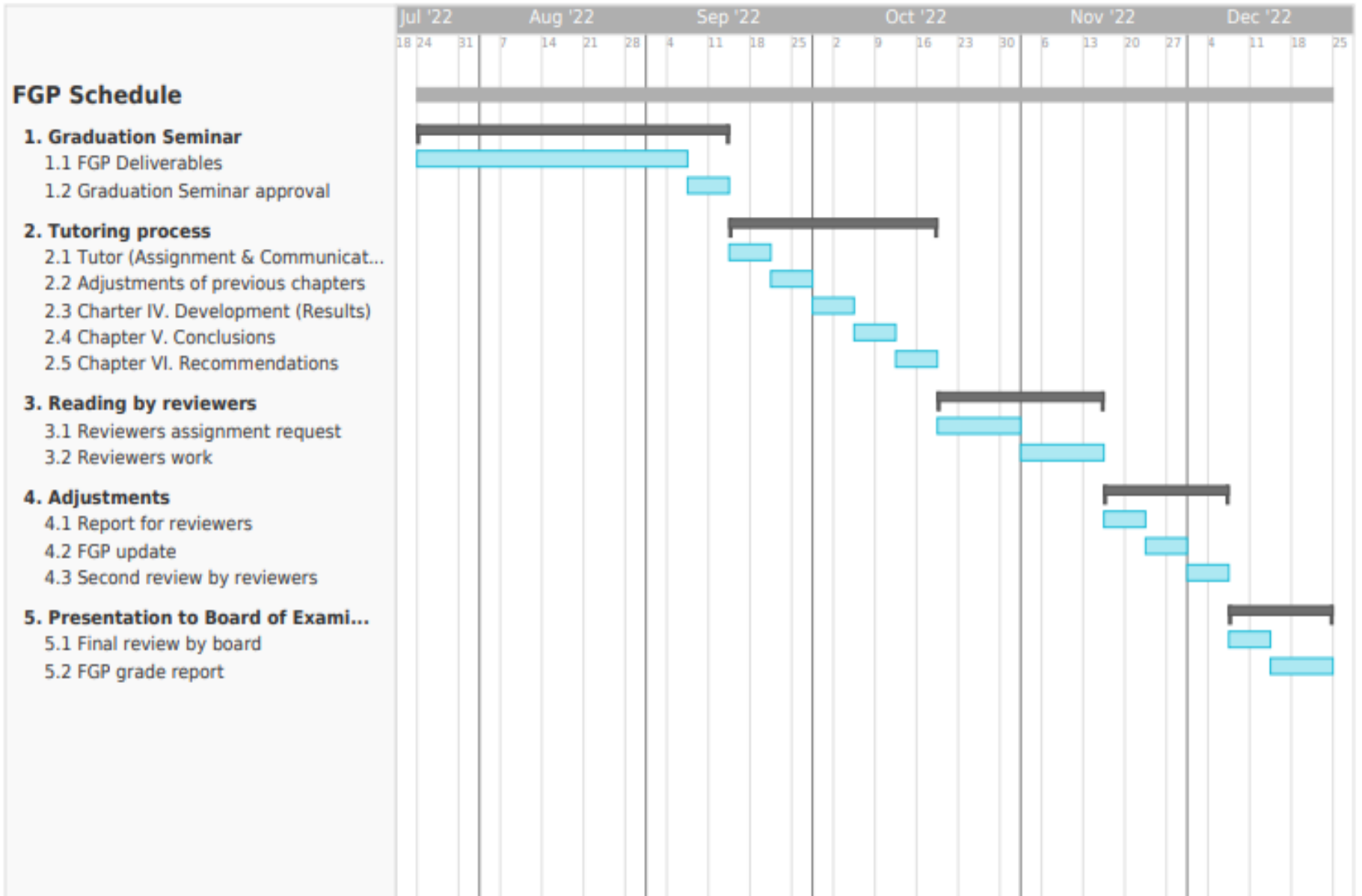
The PMO will serve as the GOB's resource and guidance when it comes to regenerative and sustainable projects especially in the areas of SDGs in relation to Gender Equality, Decent Work and Economic Growth, Quality Education, and others.

The SDGs are targets for global development that are set to be achieved by 2030 and consists of an SDG Tracker that presents data across all available indicators within their database. This database can provide an overall picture of Belize's performance in achieving the SDGs. However, the organization will be using charts and graphs from data collected from surveys and interviews with participants and beneficiaries which will indicate the impact of the projects on their livelihoods

## Appendix 2: FGP WBS



**Appendix 3: FGP Schedule**



## Appendix 4: Preliminary bibliographical research

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## Appendix 5: OPM3 Sample Questions for BELTRAIDE PMO

The OPM3 has over 500 sample questions that can be used to gauge maturity of the organization. For the purposes of the implementation of this PMO 95 questions have been extracted and 5 additional questions were formulated to determine maturity levels.

These questions are as follows:

1. Do you understand the role of the projects unit?
2. Have you used the projects office to assist in any of your projects or programs?
3. On a scale of 1-5 with 5 being Excellent, how well do you believe the projects unit has the capacity to deliver projects in a timely manner?
4. On a scale of 1-5 with 5 being Excellent, how well do you believe the projects unit has the capacity to deliver quality projects?
5. On a scale of 1-5 with 5 being Excellent, how well do you believe the projects unit has the capacity to deliver quality projects?
6. Does your organization “Establish Organizational Project Management Policies”?
7. Does your organization Standardize the “Develop Project Management Plan” process?
8. Does your organization Standardize the “Monitor and Control Project Work” process?
9. Does your organization Standardize the “Define Scope” process?
10. Does your organization Measure the “Monitor and Control Project Work” process?
11. Does your organization Measure the “Create WBS” process?
12. Does your organization Standardize the “Plan Human Resource Management” process?
13. Does your organization Standardize the “Determine Budget” process?
14. Does your organization Standardize the “Estimate Activity Resources” process?
15. Does your organization Standardize the “Plan Risk Management” process?
16. Does your organization Measure the “Estimate Activity Resources” process?
17. Does your organization Standardize the “Plan Communications Management” process?
18. Does your organization Standardize the “Identify Risks” process?
19. Does your organization Standardize the “Identify Stakeholders” process?
20. Does your organization Standardize the “Plan Risk Responses” process?
21. Does your organization Standardize the “Plan Procurement Management” process?
22. Does your organization “Establish Project Manager Competency Processes”?



23. Does your organization “Establish Strong Sponsorship”?
24. Does your organization “Use Formal Individual Performance Assessment”?
25. Does your organization “Include Strategic Goals Into Project Objectives”?
26. Does your organization Measure the “Plan Quality Management” process?
27. Does your organization Measure the “Perform Quality Assurance” process?
28. Does your organization Measure the “Program Performance Monitoring and Control” process?
29. Does your organization Standardize the “Information Distribution” process?
30. Does your organization Standardize the “Program Procurement” process?
31. Does your organization Measure the “Program Cost Estimation” process?
32. Does your organization Improve the “Program Procurement” process?
33. Does your organization Measure the “Program Cost Budgeting” process?
34. Does your organization Measure the “Program Financial Framework Establishment” process?
35. Does your organization Measure the “Communications Planning” process?
36. Does your organization Standardize the “Program Financial Management Plan Development” process?
37. Does your organization Standardize the “Program Financial Monitoring and Control” process?
38. Does your organization Measure the “Program Execution Management” process?
39. Does your organization Measure the “Program Procurement Administration” process?
40. Does your organization Measure the “Program Performance Reporting” process?
41. Does your organization Measure the “Program Scope Control” process?
42. Does your organization Measure the “Program Schedule Control” process?
43. Does your organization Measure the “Program Transition and Benefits Sustainment” process?
44. Does your organization Control the “Program Procurement Closure” process?
45. Does your organization Standardize the “Define Portfolio” process?
46. Does your organization Measure the “Define Portfolio” process?
47. Does your organization Control the “Define Portfolio” process?
48. Does your organization Improve the “Define Portfolio” process?
49. Does your organization “Use Common Project Language”?
50. Does your organization “Educate Executives”?
51. Does your organization “Facilitate Project Manager Development”?
52. Does your organization “Provide Project Management Training”?
53. Does your organization “Provide Continuous Training”?

54. Does your organization “Provide Competent Organizational Project Management Resources”?
55. Does your organization “Establish Internal Project Management Communities”?
56. Does your organization “Interact With External Project Management Communities”?
57. Does your organization “Customize Project Management Methodology”?
58. Does your organization “Integrate Project Management Methodology with Organizational Processes”?
59. Does your organization “Establish Common Project Management Framework”?
60. Does your organization “Establish Training and Development Program”?
61. Does your organization “Certify Quality Management System”?
62. Does your organization “Establish Executive Support”?
63. Does your organization “Recognize Value of Project Management”?
64. Does your organization “Define Project Management Values”?
65. Does your organization “Collaborate on Goals”?
66. Does your organization “Establish Career Path for all Organizational Project Management Roles”?
67. Does your organization “Create an Organizational Maturity Development Program”?
68. Does your organization have a “Cultural Diversity Awareness”?
69. Does your organization “Establish Organizational Project Management Structure”?
70. Does your organization “Adopt Organizational Project Management Structure”?
71. Does your organization “Provide Organizational Project Management Support Office”?
72. Does your organization “Manage the Holistic View of the Project”?
73. Does your organization “Manage the Environment”?
74. Does “The Organization Manages Self Development”?
75. Does your organization “Demonstrate Competency in Initiating a Project”?
76. Does your organization “Demonstrate Competency in Planning a Project”?
77. Does your organization “Demonstrate Competency in Executing a Project”?
78. Does your organization “Demonstrate Competency in Monitoring and Controlling a Project”?
79. Does your organization “Demonstrate Competency in Closing a Project”?
80. Does your organization “Demonstrate Communicating Competency”?
81. Does your organization “Define OPM Success Metrics”?
82. Does your organization “Collect OPM Success Metrics”?
83. Does your organization “Use OPM Success Metrics”?
84. Does your organization “Verify OPM Success Metric Accuracy”?

85. Does your organization “Analyze and Improve OPM Success Metrics”?
86. Does your organization have a “Project Management Information System”?
87. Does your organization “Achieve Strategic Goals and Objectives Through the Use of Organizational Project Management”?
88. Does your organization Measure the “Control Stakeholder Engagement” process?
89. Does your organization Measure the “Develop Portfolio Charter” process?
90. Does your organization “Encourage Adherence to Project Management Code of Ethics”?
91. Does your organization “Establish Competent Project Sponsors”?
92. Does your organization “Establish Strategic Alignment Framework”?
93. Does your organization have “Project Management Case Studies Included in Induction Program”?
94. Does your organization ensure that “Project Management Training is Mapped to Career Development Path”?
95. Does your organization “Report Project Program Strategic Performance”?
96. Does your organization ensure that “Specialists are Shared Between Projects”?
97. Does your organization have a “Consistent Project Orientation Process”?
98. Does your organization “Use Formal Performance Assessment”?
99. Does your organization “Plan for Audits”?
100. Does your organization have “Strategic Alignment of Programs”?

## Appendix 6: Sample Project Procurement Plan

### PROCUREMENT PLAN

*Put your organization name here*

*Put your logo here*

---

PROJECT NAME:	
PREPARED BY:	
DATE (MM/DD/YYYY):	

**Project Initiation Phase** – This portion of the Procurement Plan document is used to provide the project selection team with general information about the possible procurement of goods and services. No approval signatures are required.

PROCUREMENT STATEMENT
<i>Describe, in general terms, what products or services are being considered for procurement:</i>
ESTIMATED COST
<i>Provide an estimated total cost of all procurements in this project. Include confidence limits for your estimate (e.g. plus/minus dollars or percent of estimate). Example: \$1,567,000 +/- 20%</i>
VENDOR SELECTION
<i>Describe what approach the project team will take to select a product or vendor (e.g. RFP).</i>

**Project Planning Phase** – This portion of the Procurement Plan document provides detailed information about how vendors, products and services will be chosen, what kind(s) of contract(s) will be used, how vendors will be managed and who will be involved at each stage of the process. This document should be approved by appropriate individuals before the actual procurement process begins.

### PROCUREMENT DEFINITION

*Describe, in specific terms, what items will be procured and under what conditions.*

### SELECTION PROCESS & CRITERIA

*Describe the selection process. List selection criteria. Describe any analytical selection tool that you will use.*

### PROJECT PROCUREMENT TEAM

*List all stakeholders who are involved in the Procurement Process, along with contact information and a description of their Procurement Role. Enter an [ X ] next to each project team member who is authorized to enter into contract agreements or procurement for the Team (insert rows as needed).*

<i>e</i>	<i>Name:</i>	<i>Phone / email:</i>	<i>Procurement Role:</i>
<input type="checkbox"/>			
<input type="checkbox"/>			

### CONTRACT TYPE

*Document which types of contract(s) will be used and the actions required to initiate the contract.*

### CONTRACT STANDARDS

*Provide the standards for documentation that will be used for each contract.*

### VENDOR MANAGEMENT

*Describe what steps the project team will take to ensure that the vendor provides all of the products and/or services (and only the products and/or services) that were agreed upon, and that appropriate levels of quality are maintained.*

PROJECT PROCUREMENT PLAN / SIGNATURES			
<i>Project Name:</i>			
<i>Project Manager:</i>			
<i>I have reviewed the information contained in this Project Procurement Plan and agree:</i>			
<i>Name</i>	<i>Role</i>	<i>Signature</i>	<i>Date (MM/DD /YYYY)</i>

*The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Procurement Plan.*

## Appendix 7: Philological Review

December 13, 2022

Xavier Salas  
Universidad Para La Cooperacion Internacional (UCI)  
Avenida 15, Calle 35  
Barro Escalante, San Jose, Costa Rica

Ref: Philological Review of Nikki Augustine's Final Graduation Project

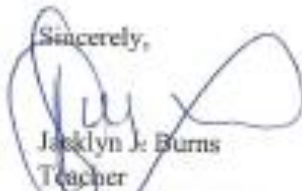
Greetings Mr. Salas,

Nikki Augustine submitted her Final Graduation Project (FGP) paper entitled "Development of A Project Management Office (PMO) for the Belize Trade and Investment Development Service" for my review and edits as a necessary part of her requirements for her Master's Degree Program.

Based on my reading, I found her FGP thesis paper to be written in an excellent English and with an acceptable standard for grammar and syntax. Her spelling is accurate and in instances where necessary changes or corrections were needed, she was able to edit for suitable language. The document, in my estimation, will meet the standards for the Master's in Project Management Degree at the UCI.

If you have any questions regarding my evaluation, please feel free to contact me via the information below.

Sincerely,



Jacklyn J. Burns  
Teacher

Belmopan Comprehensive High School

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