

PMO governance checklist

Thirty checks across six areas, for a PMO that wants its portfolio to be governed rather than merely tracked. Tick what is true today; what is left is the roadmap.

Portfolio structure

Before anything is tracked, agree what is being tracked.

- ☐ Every initiative is a project inside a named program; nothing lives only in someone's inbox.
- ☐ Each program has one accountable owner and a written scope, budget envelope and expected benefits.
- ☐ Projects carry start and end dates, a status, a health rating and a named manager.
- ☐ Status vocabulary is fixed and shared (for example Not Started → Planned → In Progress → On Hold → Completed).
- ☐ Archived work stays archived: it leaves the active view without being deleted.

Baselines and schedule control

A plan without a baseline cannot slip; it can only be rewritten.

- ☐ A baseline is set for every program at approval, and again only through change control.
- ☐ Milestones and go-lives are explicit rows, not implied by task end dates.
- ☐ Slippage is measured against the baseline and shown, not discussed from memory.
- ☐ Dependencies between tasks are recorded so a late predecessor is visible downstream.
- ☐ Computed health (overdue work, slipped milestones) is compared with reported health every cycle.

Change control

Approved means locked. Anything else is a draft.

- ☐ Every change request has a status that moves one way: proposed → under review → approved or rejected → implemented.
- ☐ Approvals are stamped with who approved and when; the record cannot be edited after approval without re-opening it.
- ☐ A change that affects the budget is added to the approved budget deliberately, never automatically.
- ☐ Reopening an approved change clears its approval and its budget line, and sends it back for decision.
- ☐ Rejected and deferred changes stay on the register as evidence of the decision.

Budget and benefits

The money and the promises are governed in the same place as the plan.

- ☐ An approved budget exists per financial year, itemised by category (Capex / Opex) and source (operating plan / change request).
- ☐ Planned and actual spend are phased by month so estimate-at-completion is a calculation, not an opinion.
- ☐ Variance against the approved envelope is reviewed at every steering meeting.
- ☐ Each program lists its benefits with a target, an owner and a measurement unit (money, count, percentage).
- ☐ Benefits are tracked monthly after go-live; realised value is reported against the business case.

RAID discipline

Risks, assumptions, issues and decisions are registers, not meeting notes.

- ☐ Every risk has probability, impact, an owner and a mitigation plan; exposure ranks the register.
- ☐ Assumptions have a verification date; an unverified assumption past its date becomes a risk.
- ☐ Issues carry priority, severity and a resolution plan; closed issues keep their history.
- ☐ Decisions record who decided, when, and the items they resolve.
- ☐ Program-level risks are allowed and visible alongside project risks in portfolio views.

Access, audit and reporting

Governance you cannot evidence did not happen.

- ☐ Access follows need: viewers read, contributors edit their own work, project and program managers approve within their scope.
- ☐ Every write to the plan, the registers and the budget leaves an audit entry with the actor and the time.
- ☐ The steering pack is generated from the live data, never rebuilt by hand in a slide deck.
- ☐ Exports of the whole portfolio are available at any time, in a format another tool can read.
- ☐ An access review (who can see and change what) is run at least quarterly.

Every check on this list is something Vedralia enforces or makes visible: baselines, one-way change control, approved budgets by year, benefits tracking, RAID registers, scoped access and an audit log. 14-day trial, no card — www.vedralia.com