

# Research Center: Improve project management to set clear expectations and help assess tradeoffs

## Why this audit is important

Effective project management practices can minimize confusion by helping to develop shared expectations about what a project will achieve, what it will cost, and when it will be completed.

The Research Center is a Metro department responsible for providing information for policy-making and operations. Funding complexity created challenges for the Research Center to prioritize its work. The complexity also made it difficult to see the connection between department costs and benefits. This had the potential to create confusion and unmet expectations for how work was prioritized.

For these reasons, we reviewed five projects carried out by the Research Center to assess the implementation of project management best practices.

## What we found

Project management practices were inconsistently applied. Schedule, scope, costs, and risk were not always identified in proposals. There were gaps in documentation and actual project costs were unavailable. Although improvements were made, refinement of current practices and additional information would be needed to set clearer expectations.

Our review also found that funding complexity created confusion and that different ideas about funding impacted expectations about what the Research Center should prioritize and deliver. This indicated a need for more communication or documentation to increase clarity across stakeholders.

Finally, although previous efforts were made to prioritize work, there was not an agency-wide data and investment strategy in place. As a result, the Research Center needed a more consistent and collaborative approach to prioritize projects and programs.

Project management practices include tools to help plan for, document, and monitor constraints that can impact the execution and overall quality of a project. Learnings from the project level can inform larger discussions about funding and prioritization.

### Three constraints can impact project quality



*Source: Metro Auditor's Office summary of project management best practices*

## What we recommend

We made six recommendations to the Research Center for setting clear expectations and prioritizing work. These included recommendations to document scope, schedule, budget, and risks for each project and to formally document project status. We also recommended that Metro ensure resources and expectations for the Research Center are aligned by documenting and communicating the department funding model and determining the need for an ongoing governance structure.