

**PROJECT MANAGEMENT OFFICE IN NONPROFIT FIRMS:
An Application in NGO Instituto Terra in Brazil**

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ABSTRACT

The article presents a technical report on the implementation of a project management office in the NGO Institute Terra, Brazil. The research methodology used in the investigation development was ex post facto, as it reports a situation already underway through technical report, presented are phases and framework of project management developed by Institute Terra as well as the functions take on by it project management office. At last, analyzing the number of projects under execution and the global budget of the institution before (2008) and after (2013) the implementation of the project management office it made it possible to identify evidences that the project management office has contributed to the leverage taken place in both of these perspectives.

Keywords: *Project management office, Project management, Nonprofit firms.*

1. INTRODUCTION

Third sector entities have taken ever more relevant share in the Brazilian society co-existing with the other two sectors performing tasks that these do not provide effective results from society's point of view. From the third-sector entities established up to 2010, 40,8% were founded between 2001 and 2010 (IBGE, 2012, p.30).

The third-sector contemplates in a broad way the activities from the civil society that do not fit in the first (represented by the public administration) and second (represented by companies) sectors as non-profit political parties, associations and foundations, unions, trade councils, religious organizations, etc.

The most recent Register of Companies (CEMPRE, in Portuguese) for the year of 2012 showed a universe of 506,067 non-profit entities that represented 9.7% of all the registrations (enterprises, public administration offices and non-profit entities). In the non-profit companies there were 3,447,810 people (6.5% of the total), being that 3,108,050 with remuneration (6.7% of the total) (IBGE 2014). The most recent study, "The private foundations and non-profit associations in Brazil" (FASFIL), with data from 2010, came up with 290.7 thousand associations and private non-profit foundations in Brazil, that counted with a contingency of more than 2.1 million of remunerated employees (IBGE, 2012). FASFIL is a snippet from non-profit entities comparing international statistics as it adopts the *Handbook on non-profit institutions in the system of national accounts* methodology elaborated by the United Nations and Johns Hopkins University. In Brazil, three legal establishments simultaneously fulfill these criteria; Associations, private foundations and religious organizations.

Most of the initiatives in third sector entities are implemented as projects, supported by partnerships or similar means with private companies, business institutes, family institutes, public entities and from the third sector itself, national or foreign. According to the directory "Environmental Management Analysis 2013", 97% of the resources from non-profit entities came from members donation, national and international agencies (Environmental Management ANALYSIS 2014, p. 215). This means that only the GIFE Chain that gathers 140 private social investors in Brazil have allocated around R\$ 2.2 billion in 2011, according to the most recent Census GIFE (GIFE, 2013).

The demand level from sponsors and partners have grown gradually as it is equally greater the volume of resources supported to third sector entities. The rate of nominal growth of invested value by the GIFE chain of 2010 to 2011 was 9.2% (GIFE, 2013).

Under this perspective this study shall present a technical report on the implementation of a project office in the NGO Institute Terra. The research method used to develop the investigation has been ex post facto.

Initially it is done an overview of the third sector, then a brief theoretical study on project offices and at last a report on the implementation of the project office in Institute Terra.

2. NONPROFIT FIRMS

2.1 Institutional Modeling

The way that the entity organizes itself (it's organizational structure) to manage projects depends mainly on its structure, institutional architecture and corporate governance.

The function “project management” in many cases is done by occupants of specific positions (as director, manager, coordinator, analyst, assistant or project assistant) that may or not be part of characterized departments or depend naturally of an institutional modeling from each third sector entity.

To conceive the entities' organizational and institutional modeling it was necessary to define its institutional architecture, corporate governance and organizational structure.

2.2 Institutional Architecture

The definition for institutional architecture at a last glance means to seek the definition to function for the organization having in mind its institutional macro-universe (set of entities in which it relates to and their respective roles).

Third sector entities actions are normally propositional (obtaining resources, mainly through spontaneous demands, replying notices and related items and donations) and/or executing (executing the projects' actions for which the resources have been obtained for – instead to transfer the resources to third parties – executors – to exclusively do the project management).

The institutional architecture of third sector entities generally include agents as seen in Figure 1.

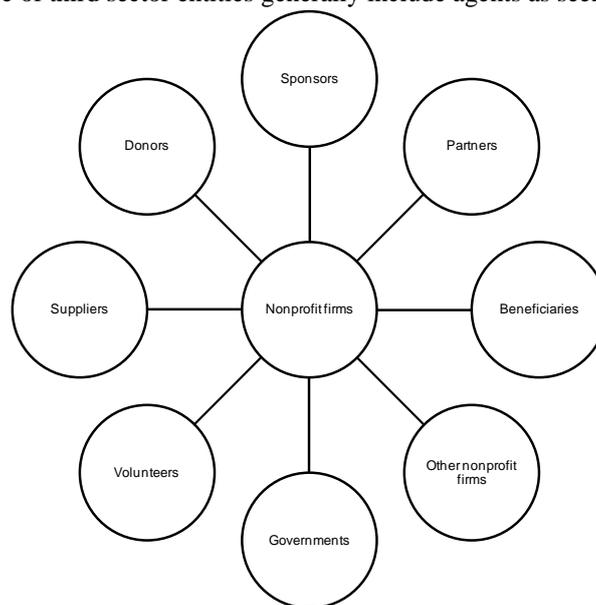


Figure 1 Generic Institutional architecture of third sector entities

Explained the distinction among partners, sponsors and donations:

- Sponsors: through partnerships are established mutual collaboration criteria that foreseen transferring resources to the entity, with or without counterparts in order to fund the project.
- Donors: transfer of funds to the entity through donation receipts not necessarily linked to funding the project, being possible to applied to funding support activities.
- Partners: through cooperation terms or similar that are established mutual criteria that do not foresee transfer of resources to the entity.

2.3 Corporate Governance

The corporate governance model defines a macro-structure of the organization's power: deliberative bodies (Assembly, in case for the association, or Board of Trustees for the foundation, and Board of Directors. Both of

which are mandatory and non-remunerated bodies. Unless the entity is qualified as OSCIP, that would allow the directors to be remunerated), inspectors (Audit Committee and external audit, mandatory bodies in some cases as the Audit Committee not necessarily remunerated), consulting, (Advisory Board, optional body) and executive (depending on the size of the entity and usually remunerated) and how these bodies relate to each other.

Corporate governance is “the system in which organizations are managed, monitored, incentive, involving council relationship, executive team and control bodies”, according to the Guide of best practices in corporate governance for foundations and business institutes published by the IBCG – in English standing for Brazilian Institute of Corporate Governance in 2009.

This important guide presents the basic principles of governance to equality (fair treatment from all stakeholders), the transparency (more than make the imposed information available by legal means, it is mandatory inform all that is of interest to the stakeholders), accountability (the entity's agents must be accountable for all the consequences of their acts and omissions) and the responsibilities (the governance agents shall ensure the sustainability of the organization seeking their longevity); similar principles to guiding the public administration: Legality, impartiality, morality, transparency and efficiency.

In addition, as a principle for third sector entities, the economy, that is, offering technical and managerial knowledge for the lowest prices compatible with the survival of the entity.

Still according to IBGC, “Good governance practices convert principles in objective recommendations, aligning interests with the finality to preserve the organization's reputation and optimizing its social value facilitating access to resources and contributing to its longevity” (IBGC, 2009, p.19)

Concerning a third sector entity, the governance structure needs to be in conformity to the pertinent legislation and hold bodies that are from outside the organization as contractors and intervening actors, besides the internal governance bodies.

Having as base the institutional architecture generically designed (Figure 1) and the legal framework, shown below is the generic corporate governance structure of nonprofit entities (Figure 2).

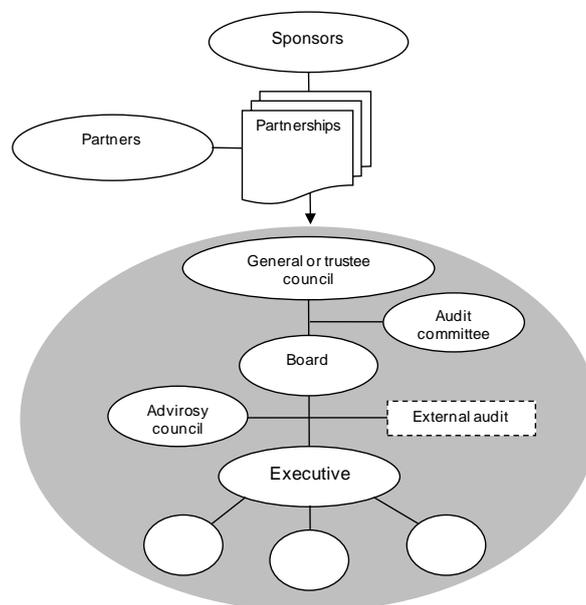


Figure 2 Structure of generic corporate governance of third sector entities

Thus the division of bodies from out of the organization:

- Sponsor: approves accountability and delivery of projects (product, service or specific results arising from the project), in line with its scope.
- Partners involved: acting together or in complementary to the organization of the third sector, joining efforts and qualifying results. It is therefore jointly responsible for part of the activities foreseen in the agreements.

2.4 Organizational Structure

Figure 3 presents the organization of generic model from which the organizational structure modeling criteria are defined and applied.

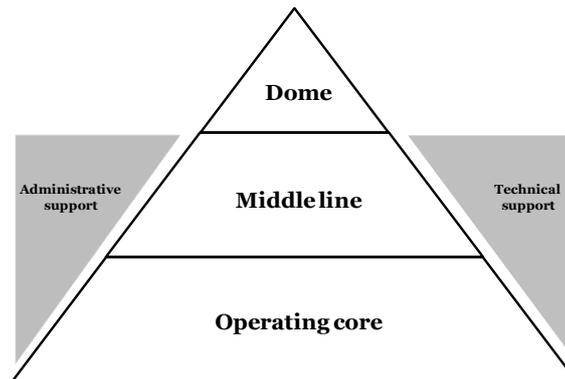


Figure 3 Generic Model of organizational structure

A concept of third sector entities:

- The operating core contains the implementation of the final activities and comprises the core processes from which inputs (material resources, assets and human) are transformed into deliveries that are distributed to the beneficiaries;
- Technical support is responsible for the functions to formulate, standardize, standardize, plan and control the processes material input into deliveries;
- Administrative support is in charge of promoting the physical infrastructure, human and logistics needs to other areas, mainly to the operating core;
- The middle row contains the vertical connecting elements (successive grouping of individual positions in the operational core) and horizontal (between technical and administrative support); and
- The dome coordinates the other parts and does the border relations function, interacting with the external environment at the institutional level.

The organizational structure modeling focuses on two basic questions:

1st Which structural model best provides and turns effective the coordination of the parts (operating core, supports and dome)?

The most frequent organizational designs in literature are:

- Functional: organizations structured so that similar operations are grouped by function (hence being functional organizations) in departments such as Finance, Marketing etc. In these organizations project managers usually have other responsibilities beyond those related to current projects and have limited authority, often responding to functional managers;
- Projected: opposed to functional organizations. In this type of structure projects are the main priority and the project manager has full authority over the project and support functions (accounting, supplies, IT etc.) are subordinate to a project manager instead of a functional manager and;
- Matrix: combination of functional and projected organizations that can take on different characteristics depending on the degree of relevance in that each end (functional and projected) is considered, divided into weak matrix (greater weight of the functional structure), balanced and strong (projected greater weight of structure). In the balanced matrix there is usually a management unit of project managers at the same hierarchical level of functional departments (accounting for administrative tasks and that support project management) and the focus of the organization concentrates on project work than in departmental work.

Another basic question is:

2nd What should be the organizational units and how should they be grouped (hierarchical arrangement)?

The design of the organizational structure of each entity depends on their size, areas of expertise (social core business) and its geographical area of operation. The project management function can be exercised by employees allocated in specific sectors and being accepted as line (running) or as staff (assistance) in the organizational design.

3. PROJECT MANAGEMENT OFFICE

In many project management structures it has been successfully implemented Project Management Offices (DINSMORE, 2000; Levine, 2000; KATE, 2001; Crawford, 2002 and LACRUZ, 2010). Both in private companies (as in VALE) and directly in public administration (as in the government of the State of Espírito Santo)

and indirect (as in the Brazilian Central Bank) and third sector entities (such as the Institute Terra). More and more organizations seem to opt for the implementation of project management offices to support their efforts in search of effective project management.

Block & Frame (1998) may have been the first to highlight the importance of creating a unit, named by them as project office, in order to support formally the management of the projects in the organizations.

According to the 5th edition of PMBOK

A project management office (PMO) is a management structure that standardizes the project-related governance processes and facilitates the sharing of resources, methodologies, tools, and techniques. The responsibilities of a PMO can range from providing project management support functions to actually being responsible for the direct management of one or more projects (PMI, 2013a, p.10).

This definition aligns with the basic objectives of the organizations with the implementation of project offices: to support project management.

Heldman (2009) complements stating that the project office is an organizational unit that centralizes and coordinates project management and programs throughout the organization, operating continuously and promoting support for project management functions in the form of training, software and standardized policies (operational processes assets).

In a result oriented perspective, Dinsmore (2003) describes the project office with the main objective to guide and support the project managers allowing the organization to develop their projects as efficiently and effectively as possible.

Yet, Hill (2008) links the project office to a storehouse, arguing that it is responsible for ensuring that an organization's project management practices are transmitted for use within the organizational environment.

Tjahjana, Dwyer & Habib (2009) complement the project office is a place of business which supports, monitors and governs the projects throughout their life cycle, deciding on methodological standards to be followed by the project teams.

In general, the cited authors converge on the importance of the project office to the maturity of project management in organizations. The main point on several project office definitions is that they are business units organized to serve the organization's project management. Nevertheless, as noted Barcaui & Quelhas (2005), in a survey conducted with 116 Brazilian companies, most project management offices were implemented in reactive manner, that is, after the organizations could no longer lose money with their projects.

It can be concluded that to set up a business unit (regardless of their level in the organizational structure: corporate, divisional, departmental or sectoral etc.), the organization does not want another expense center, but a cost center that will support revenue centers and / or produce savings in the production processes and / or services linked to the projects.

As for the project office's position in the organizational design, it will depend on the functions that shall perform and the authority level assigned to this organizational unit.

For Crawford (2006) there are three main types of project offices: the Individual Project Office, in which individual projects are developed; the Departmental Project Office, which has a number of projects management capacity, treating them with a vision as a whole; and the Strategic Project Office, where the company's level of integration is even greater, also doing portfolio analysis and aid in decision making.

As for Mansur (2009), there are four main project office designs: Corporate Office, located in senior management; divisional, positioned within a management division; sectoral positioned within a management; and departmental positioned in a department (Figure 4).

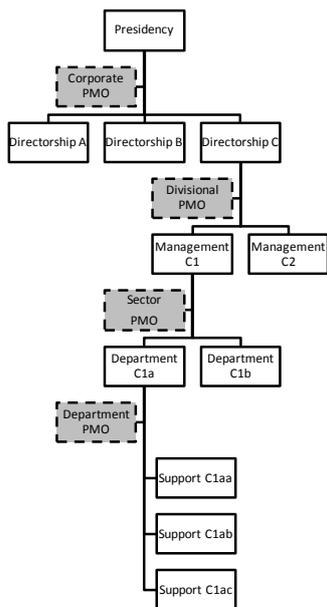


Figure 4 Nucleation of project management office
 Source: MANSUR (2009, 31-34)

Mansur (2009) positions the project office as staff - common in organizations with functional organizational structure. But in projected or matrix organizational structures, it is generally positioned as line and the first level of hierarchy of a division or sector (Figure 5).

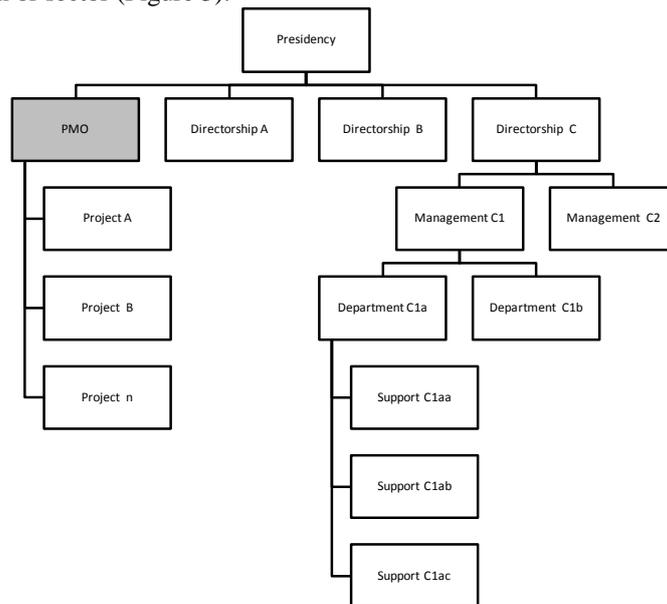


Figure 5 Nucleation of project management office in matrix organizations

The research PMSURVEY.ORG 13 edition (PMI Chapters, 2014), showed that 50% of project offices report to a director or an executive board, 31% for the presidency or vice presidency, 13% to a manager and 6% others. It is noteworthy, therefore, that at least 81% of cases are not subject to a management and those that are nucleated in the great majority of responding organizations are at strategic or tactical level.

In a perspective that goes beyond the nucleation of the project office there are several types with most of them (DINSMORE, 1999; Taylor, 2006; LETAVEC, 2006; HOBBS & AUBRY, 2008; Vianna Jr., 2012) resulting from Verzuh work (1999).

Revisiting the typology proposed by Verzuh (1999) - done before the project management office expression had gained notoriety and whose classification has been adopted by several authors - which proposes a classification based on the level of responsibility of the functions that the project offices perform and in his authority being

characterized as the center of excellence, Project support office (back office), Project management office (PMO), program management office (program office) and Accountable management office (project control office), thus its new classification:

- Project support office: has limited influence to the compilation and dissemination of best practice in project management and internal asset operational processes and support to project teams in the adoption of best practices and operational process assets.
- Project office: differs from project support office due to the fact that project managers report to it, with some link of subordination, and not only to different organizational units which are connected, being the project office co-responsible for the project results.
- Program office: structure that integrates information from projects that should be conducted in an interrelated manner. In addition to being co-responsible for the results of the projects, it also has responsibility over the integrated management (benefits, acquisitions, risks etc.). A peculiar feature is that this type of structure can have temporal character (so that the when projects that make up the program are closed, the structure is undone).
- Portfolio office: This type is positioned at the strategic level of the organization and is responsible for conducting the entire portfolio of projects.

Below is synoptic table comparing the five types of project offices proposed by Verzuh (1999) in relation to their responsibilities and authority (Figure 6).

Responsibility	Forms of the Project Office				
	Low	Authority to influence projects			High
	Center of excellence	Project support office	Project management office	Program management office	Accountable project office
Maintain standards	●	●	●	●	●
Maintain history	●	●	●	●	●
Organize training	○	○	○	○	○
Mentoring and consulting support	○	●	●	●	●
Schedule and budget analysis		●	●	●	●
EPM technology		●	●	●	●
Multiproject coordination		●	●	●	●
Project oversight		○	○	●	●
Make project management decisions				●	●
Supervise project managers			○		●
Meeting project objectives			○	○	●
Career growth for project managers	○	○	●	○	●
Supply project managers to the organization			○		●
Participate in project portfolio management	○	○	○	●	●

Legend: ● = Full responsibility
 ○ = Partial responsibility
 Blank = No responsibility

Figure 6 Types of project offices and its responsibilities

Source: VERZUH (1999, p.375)

For Verzuh (1999) the project office is a work in progress inside a continuum of maturity. Evolving from none of little responsibility to shared responsibilities of the organization’s projects.

This does not mean that, however, an organizational unit of projects is not a portfolio office that has not achieved its plain development. This will depend of the reasons for which it has been implemented. When all the objectives have been reached, it will achieve the peak of its development; hence its maturity.

In addition to the types presented by Verzuh (1999), it is added the *Virtual Project Office* (VPO) and the PMO Global – which discussions are more recent.

A VPO comes from the necessity to manage the projects whose portfolio or team is geographically spread. In this enclosure technology has key role with groupware tools, cloud computing, intranets etc. And the VPO has the lead role in ensuring a favorable environment for virtual team (Barcaui, 2012).

The PMO Global that arises from new ways of company activities at a global level such as holding, joint venture, incorporation, mergers, etc, what implies in the dissemination and consolidation of the controlling company culture. The PMO Global has as its mission to support the required projects to implement this.

Aware of the diverse types of project offices, it can be defined that based in the objectives that provoke its creation, the functions to be developed and organizational structure that will be implemented, the most suitable type.

Finally it is important to highlight that as Dinsmore (1999) warns, the models developed for project offices not always fully apply to specific cases. Therefore it is possible to find alternative or hybrid solutions (combinations with established models). More important than typify the project office is to develop it in a way that meets the needs for which it was created.

4. PROJECT MANAGEMENT OFFICE IN NGO INSTUTO TERRA

Institute Terra is a nonprofit civil association founded in 1998 that has as its mission to “stimulate sustainable development through the recovery and conservation of forests, environmental education and the correct use of natural resources”.

Its focus areas are the ecosystem recovery, environmental extension, native seedling production. Environmental education and applied research, and its prioritized geographical field is the Vale do Rio Doce, one of the Atlantic Forest regions mostly devastated in Brazil, that reached the states of Minas Gerais and Espírito Santo.

It is an institution that promotes purposeful and executing actions; ie raising funds (mainly on spontaneous demand and replies to notices and related) and performing the actions of the projects for which funds were raised - instead of transferring them to third parties (executors) and following up on the progress of the project. The projects have domestic and foreign sponsors; public, private and third sector entities.

The organizational drawing of Institute Terra (FIGURE 7) combines an integrated structure with functional departmentalization criteria of project units (matrix). These options are in line with the dynamics of the third sector entities, to have temporary projects units (partnership period), and functional aggregation of its macro processes - although some overlap. Given the interdependence of macro processes, coordination of units is done mainly by supervision of the summit, by mutual adjustment (side integrations) and standardization.

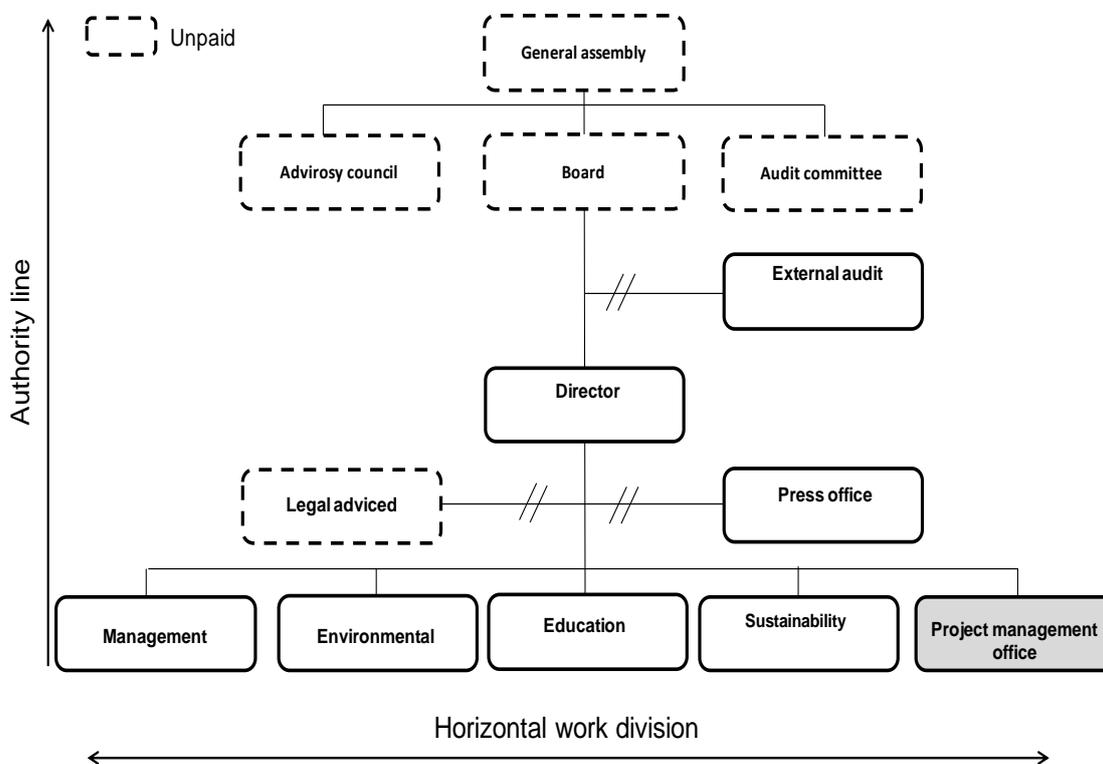


Figure 7 Organizational Drawing of Institute Terra

The organizational structure of Institute Terra can be characterized as strong matrix and its project office is nucleated at the tactical level, next to the other departments (business units divided according to their areas of expertise or themes), with reporting line to the CEO of entity (executive superintended).

The implementation of a project office at Institute Terra started beginning 2009 during the re-engineering process or revision of its core social business, having as its financial director as the main sponsor.

The motivation to implementing a project office was the absence of a project management methodology and an increase in the number of ongoing projects concomitantly. This made urgent the systematization of the project management process.

From the beginning there were the premises of what the methodology was:

- (i) adhering to the third sector entities
- (ii) progressively implemented
- (iii) in a systematic way
- (iv) starting with the critical processes
- (v) used in conjunction with a collaborative software.

Initially phases were established (and sub-phases) of projects in the third sector and its inter-relationship (Figure 8).

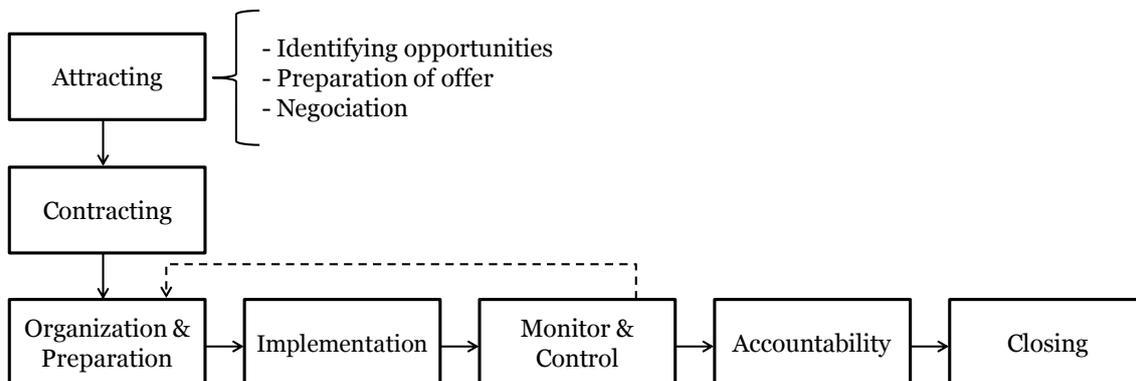


Figure 8 Project management phases in the nonprofit firms

Based on the phases was developed methodology, relying on the PMBOK.

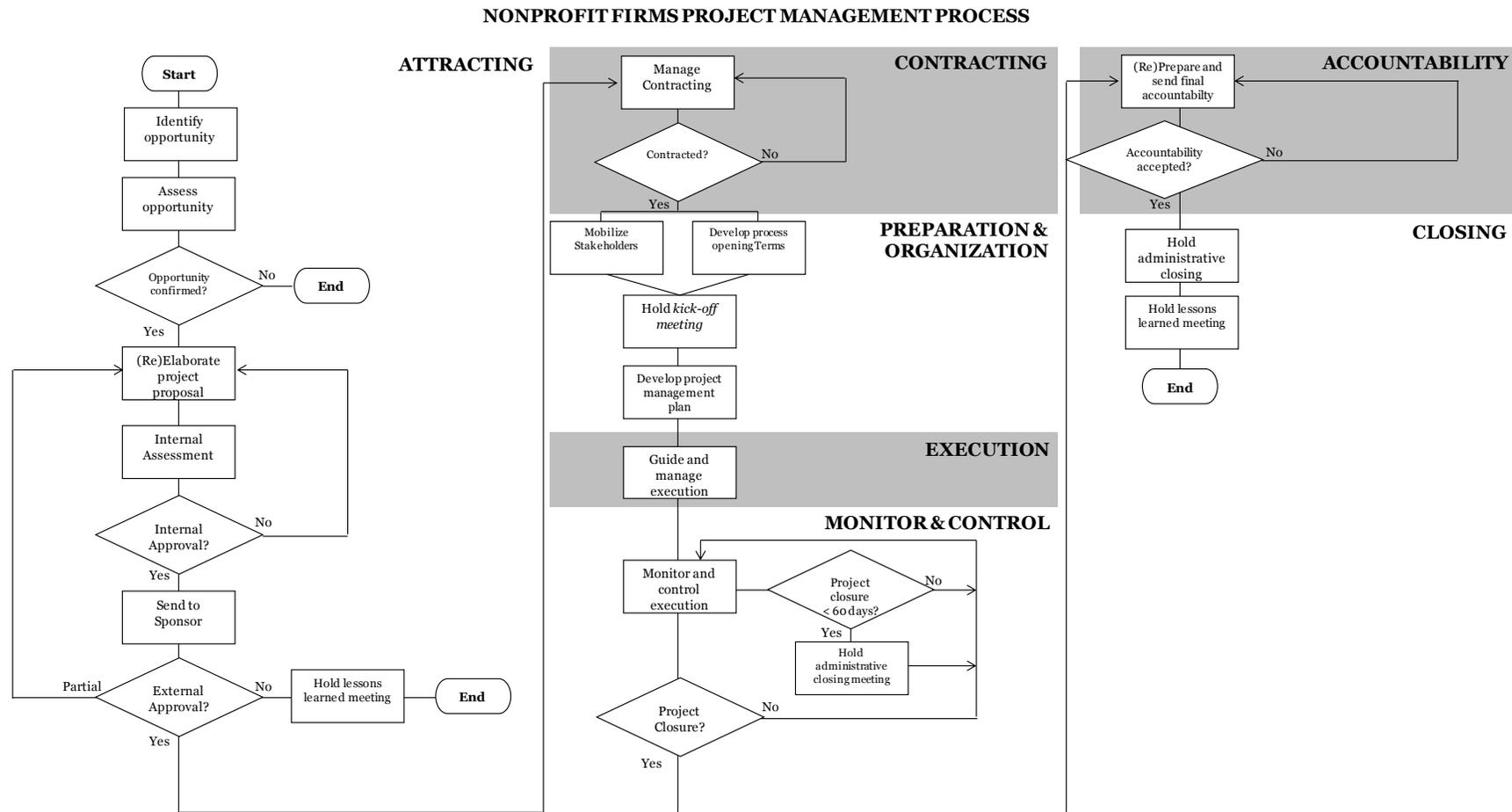


Figure 9 Nonprofit firms project management Framework

At first it was implemented processes from integration areas, scope, time and cost (tripe restriction). At the same time it was developed a Project non-Profit software.

It was opted for the development instead of the option to purchase on the market because it was not identified a suitable software to the peculiarities of the third sector entities in that time.

The project office was designed with the mission to add value to project management, becoming a guiding unit, with two employees, and has the following functions:

- development, deployment and support methodology and project management tool;
- project design;
- monitoring and control of projects and the definition and monitoring of performance indicators;
- sharing performance reports and documents;
- support for the shared resource management (procurement);
- audit projects and;
- portfolio management.

Note the line with the functions displayed in search PMSURVEY 13 edition for the third sector segment.

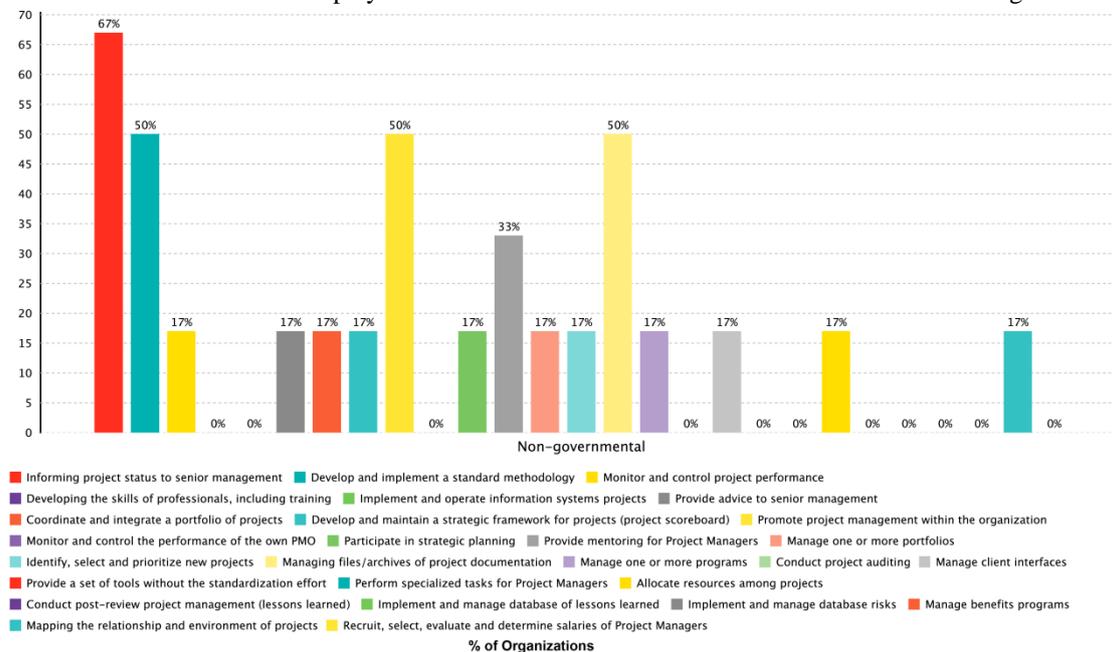


Figure 10 Functions of the PMO – by nonprofit firms
 Source: PMI Chapters (2014)

When the first version of the methodology and the Non-Profit Project were completed a general training was done to everyone involved (project managers, project staff, technical support, administrative support, etc.) in order that they could properly assimilate the methodology and also collecting suggestions for new settings. Also to minimize any resistance, mainly due to informality habits, from that point on, it would be replaced by "formalities" that could be considered a waste of time or bureaucracies - in the pejorative sense of the word.

The implementation was conducted as a work in progress, motivating feedback from employees. All suggestions were listed and prioritized and then given back to the author's suggestion.

The suggestions considered priorities were implemented on an emergency basis and the other in periodic reviews (quarterly). This contributed to the project office deployment has hardly been relevant resistance, because all were participants.

In 2011 the management methodology included other project management areas (communication, purchasing, risk, quality and people) and in 2013 the area, stakeholders. It is considered then that the project office is evolving into a program office.

Since 2012 Institute Terra project office has been dedicated to improving its tools, expand its functions and enhance its methodology, especially, but not limited to:

- Started performing activities related to project auditing which reduced rework and increased the rate of compliance with the scope, quality, purchasing and processes
- Started performing activities related to portfolio management, contributing to evaluating opportunities for new projects and resource allocation.
- Included as a process the meeting about lessons learned separately from the meeting of administrative closure and implemented the Project non-profit registration and consultation of lessons learned. This enabled the lesson learned becomes from the organization and not only of its employees - once it is recorded and can be viewed at any time.
- Project library implementation (very useful to keep all documentation of the projects gathered in an organized manner) within the Project non-profit software. This allowed access to data documentation related to the projects (partnerships, accountability, clipping etc.) easily, quickly and safely.

In 2008 Institute Terra executed 16 co currently projects which global budget came to 2.7 million Reais. In 2013 it executed 33 co currently projects, that global budget totaled 4.7 million Reais.

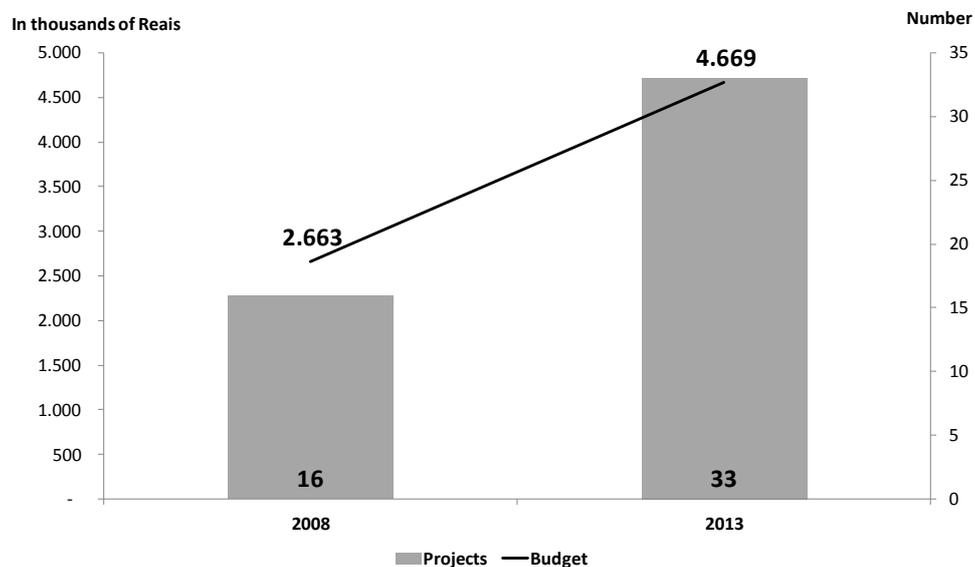


Figure 11 Evolution in the number of projects and global budget in Institute Terra – 2008 to 2013

It is seen a 106% leverage in the number of project and 75% of the total budget. One can not, however, consider the leverage only to the project office deployment but it may be perceived that it has contributed to this.

Among the benefits of implementing a project office in Institute Terra, it may be highlighted:

- professionalism in project management;
- improvement in the quantity and quality of information related to projects, mainly in relation to deliverables;
- increase in integration among areas involved (management, purchasing, treasury etc);
- better understanding on roles developed by each member in the execution of the project;
- increased self-demand on accomplishing goals and;
- reduction in time allocation due to corrections.

The main challenge for the project office in Institute Terra is related to the difficulty in building a solid learning curve in the employees directly involved in projects. It is constant the necessity to train managers and project teams as Institute Terra has a strong matrix structure, it is not uncommon that after finishing a project, the team to be dismissed. Then when starting a project on the same theme, it could be taken in consideration the learning curve of that employee who may not be easy to hire once again. As Institute Terra has its own project management methodology as entities from the third sector do, the search for an already qualified professional becomes even more difficult.

The most urgent “challenge” that the project office in Institute Terra is going through has to do with its program Olhos d’Água, for protection and conservation of springs, aiming to meet all the 229 municipalities from the region Vale do Rio Doce (ES and MG) in the following 15 years in a scaled manner, counting with 3 executing

entities. For an effective integrated management of the program, the PMO needs to rely on a Program Management Office in a Virtual environment (VpgMO). This environment, structured in an online platform, will work as an integrated information center. Each executing entity (Institute Terra and other two entities from the third sector) will manage the project from this platform. The program will be managed by data integration from the three projects. This platform could even be used as a feedback tool to the sponsors, the beneficiaries and society. This process is under viability analysis.

5. CONCLUSION

Despite having to list the benefits with the project office implementation, it is necessary to isolate its effects, which did not occur in the itinerary of this research, it is possible to see that its implementation has contributed to the leverage achieved in the number of projects and the overall budget.

In addition it is related to the implementation a positive leverage to the project office of 118% occurred in EBITDA margin in 2013 compared to 2008 (Table 1).

TABLE 1 Institute Terra EBITDA Margin

Year Indicator	2008	2013	Leverage (2013/2008)-1
EBITDA margin	-12,2%	2,2%	118%

It has been calculated from the data of the Statement of Surplus / Deficit ended Year in 2008 and 2013 of Institute Terra (audited by an independent company), the EBITDA margin (Earnings Before Interest, Taxes, Depreciation and Amortization), which has been used by several organizations as operating cash flow indicator.

There are two limitations usually related to EBITDA margins:

- possibility of giving a false organization liquidity perspective as in the "purification" of EBITDA are taken interest loans that can be hired to leverage its operations. This limitation does not apply to Institute Terra as does not take out loans;
- Ignore the need for required reinvestment (due to depreciation), which is especially critical in organizations with short lifespan operating assets which does not apply to Institute Terra.

The Leverage obtained results from several related actions, among them the implementation of the project management office which certainly has contributed to the reduction of identical existing expenditure items in different projects (FIGURE 11) and as non-conformity in project management were decreased the operating income (EBITDA) was maximized. It was possible, however, to determine the relative contribution of the project management office deployment in EBITDA, by not minimizing its contribution; only not being able to determine its share of participation.

It is noteworthy however, that the sustainability of this initiative depends on the learning capacity of the Institute Terra as an organization, which is directly related to the systematization of processes and logging of experiences.

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