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PRACTICAL GUIDES FOR
PROJECT PROFESSIONALS

AI Governance for PMOs

A practical kit for governing AI in project, program and portfolio work

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Assess · Inventory · Delegate · Control · Test · Measure

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Author of Establishing A PMO: A Guidebook for Project Management Professionals

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Contents

About the Author 4

How to Use This Kit 5

Step 1: Set the Mandate and Know the Landscape 7

Step 2: Assess Governance Maturity 9

Step 3: Inventory AI Use 11

Step 4: Assign Decision Rights 12

Step 5: Set Delegation Limits 14

Step 6: Classify Risk and Assess Impact 16

Step 7: Install the Human Accountability Gate 18

Step 8: Build the Control Map 20

Step 9: Govern the Use-Case Lifecycle 23

Step 10: Evaluate Vendors and Tools 25

Step 11: Pilot, Monitor and Respond 28

Step 12: Prove Value and Scale 30

Using the Templates 33

Appendix A: Discovery Questions 35

Appendix B: Frameworks at a Glance 36

Next Steps 38

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STEP 05

Set Delegation Limits

Decide, for each use case, how much the AI may do on its own. The **AI Delegation Ladder** gives everyone the same six levels to talk about, and makes clear that more autonomy is earned with evidence, not bought with a license.

You will produce	Use
Approved delegation level for every use case · a never-delegate list	Workbook: AI Use-Case Register (delegation level) · Policy template, section 2

5.1 The AI Delegation Ladder

Level	AI may	Example	Minimum human control
L0 No AI	No AI processing	Excluded or regulated cases; prohibited data	Policy prohibition; exceptions only through audit
L1 Draft	Prepare drafts that are not released	Meeting notes, draft RAID update	A person checks and publishes
L2 Analyze	Find patterns and compare evidence	Variance explanation, anomaly flags	Reviewer checks inputs and interpretation
L3 Recommend	Offer ranked options and scenarios	Portfolio options, likely schedule exposure	A person records the choice; AI commits nothing
L4 Execute with approval	Carry out a narrow action after explicit approval	Update an approved tracker field; send an approved reminder	Approval for each action plus a transaction log
L5 Constrained autonomy	Run a reversible, allowlisted, low-impact workflow	Routine data-quality flags and draft routing	Pre-approved limits, monitoring, thresholds and a tested stop switch

5.2 Decisions AI never makes

Whatever the level, AI does not hold authority for these decisions. It may help prepare them; a named person makes them:

- Approving project funding or contingency drawdowns
- Rebaselining approved schedules or material scope changes
- Awarding or changing contracts
- Terminating projects

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- Personnel decisions (hiring, assignment, performance)
- Safety controls and high-impact security exceptions
- Regulatory sign-off

5.3 How a use case moves up the ladder

1. Start at the lowest level that delivers the benefit. Most PMO uses are L1 to L3.
2. Collect evidence at that level: test results, error and override rates, incidents and user feedback.
3. Ask for a higher level through the gate process (Step 9). L4 and L5 need a fresh risk assessment, security testing of the actions involved and a tested stop switch.
4. Move back down when evidence weakens: rising errors, a serious incident, a model change or a change in data.

> **Agents need extra care**
>
> An agent that can call tools or update systems can do harm at machine speed. Give it its own scoped identity, an allowlist of actions, transaction limits, logs and a stop switch someone has actually tested. Write these into the agent design contract in the Prompt & Guardrail Library.

Done when

- Every registered use case has an approved delegation level.
- The never-delegate list is in the policy and in training.

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FORM F02

Human Accountability Gate Record

Owner: Named decision owner · **Use when:** Step 7, for each consequential decision that used AI output

Organization: [Organization] · **Use case ID:** [UC-000] · **Version:** [v0.1] · **Date:** [Date]

No approval without a named owner who holds the authority and complete evidence.

Decision record ID	**[DL-0000]**
AI system and version	**[Tool / model / prompt or workflow version]**
Decision or action requested	**[Specific request]**
Consequence and reversibility	**[Rating and why]**
Data sensitivity and legal context	**[Classification; any legal, regulatory or contract issue]**
Sources and how current	**[Links, as-of dates, missing information]**
Limits and uncertainty	**[What the AI could not see or may have wrong]**
Options and trade-offs	**[Including doing nothing]**
Risk and policy checks	☐ Privacy ☐ Security ☐ Legal ☐ Policy ☐ Not required (reason)
Named approver and authority	**[Name, role, delegation reference]**
Decision	☐ Approve ☐ Approve with conditions ☐ Deny ☐ Return for evidence ☐ Override AI recommendation
Rationale	**[Why]**
Signature and date / time	

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Inside the Governance Workbook

20 Excel tabs with working formulas, dropdowns and charts

AI Use-Case Register: tier, gate, approver, review dates and automatic flags



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AI Use-Case Register

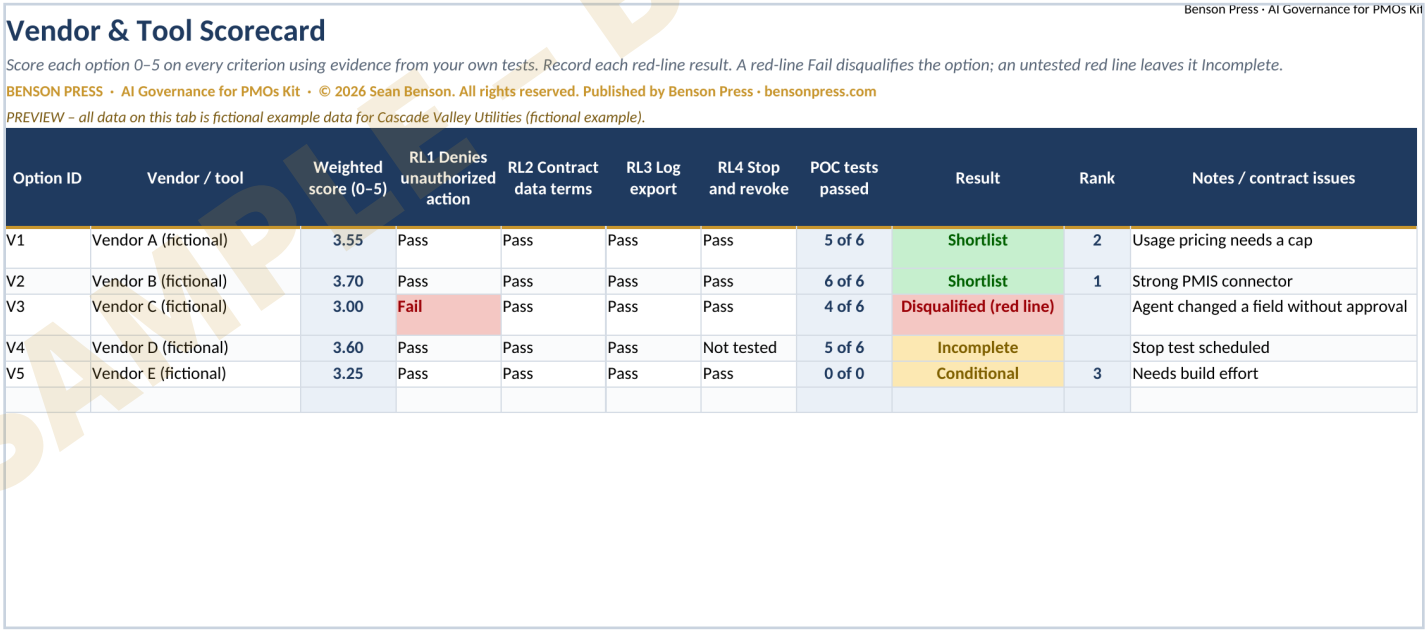
One row per AI use, including tools already in use without approval. Review dates follow the risk tier: T1 180 days, T2 90, T3 30. T4 Restricted should never be in pilot or production.

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PREVIEW – all data on this tab is fictional example data for Cascade Valley Utilities (fictional example).

Use case ID	Use case	Risk tier	Gate	Status	Named human approver	Fallback (manual process)	Last review	Next review due	Review status	Flags
UC-01	Draft weekly status summaries	T1 Low	G5	Approved	J. Rivera	PMs write summaries	10/01/2026	03/30/2027	OK	
UC-02	Flag schedule slips across portfolio	T2 Moderate	G3	Pilot	A. Chen	Weekly manual slip review	10/21/2026	01/19/2027	OK	
UC-03	Summarize RAID logs for gate packs	T1 Low	G4	Approved	J. Rivera	Analyst prepares pack	06/13/2026	12/10/2026	Due ≤ 30 days	
UC-04	Estimate-at-completion variance notes	T2 Moderate	G2	Assessed	M. Okafor	Finance prepares notes	08/07/2026	11/05/2026	Overdue	
UC-05	Suggest staff assignments from skills data	T1 Low	G1	Proposed					No review date	No approver; Personal data – check tier
UC-06	Agent updates tracker fields after approval	T3 High	G2	Assessed	D. Patel	Manual tracker update	10/31/2026	11/30/2026	Due ≤ 30 days	
UC-07	Draft sensitive stakeholder messages	T2 Moderate	G3	Pilot	S. Nguyen	Director drafts	09/11/2026	12/10/2026	Due ≤ 30 days	
UC-08	Auto-approve change requests under $5k	T4 Restricted	G1	Rejected			11/05/2026	11/05/2026	Closed	

Vendor Scorecard: weighted score, red lines, POC results and the decision



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Vendor & Tool Scorecard

Score each option 0–5 on every criterion using evidence from your own tests. Record each red-line result. A red-line Fail disqualifies the option; an untested red line leaves it Incomplete.

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PREVIEW – all data on this tab is fictional example data for Cascade Valley Utilities (fictional example).

Option ID	Vendor / tool	Weighted score (0–5)	RL1 Denies unauthorized action	RL2 Contract data terms	RL3 Log export	RL4 Stop and revoke	POC tests passed	Result	Rank	Notes / contract issues
V1	Vendor A (fictional)	3.55	Pass	Pass	Pass	Pass	5 of 6	Shortlist	2	Usage pricing needs a cap
V2	Vendor B (fictional)	3.70	Pass	Pass	Pass	Pass	6 of 6	Shortlist	1	Strong PMIS connector
V3	Vendor C (fictional)	3.00	Fail	Pass	Pass	Pass	4 of 6	Disqualified (red line)		Agent changed a field without approval
V4	Vendor D (fictional)	3.60	Pass	Pass	Pass	Not tested	5 of 6	Incomplete		Stop test scheduled
V5	Vendor E (fictional)	3.25	Pass	Pass	Pass	Pass	0 of 0	Conditional	3	Needs build effort

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Screenshots show fictional example data for Cascade Valley Utilities, a fictional organization. Vendor names are fictional. The workbook in the kit comes with blank tabs and a few clearly marked example rows.

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Get the full kit

Everything in this sample, plus the rest of the guide and every template

1. Guide

38-page PDF + editable Word. 12 steps: mandate and landscape, maturity, AI inventory, decision rights, delegation limits, risk and impact, the Human Accountability Gate, control map, use-case lifecycle, vendors and tools, pilot and monitor, value and scale.

2. Governance Workbook

20 Excel tabs: governance dashboard, maturity assessment and summary, AI use-case register and scorecard, risk and impact assessment, oversight and decision log, controls checklist, vendor criteria and scorecard, POC tests, pilot evaluation, incident log, exception register, benefits, KPI catalog, RACI, roadmap.

3. Policy and Controls Template

An editable AI use policy with a delegation ladder, risk tiers, an 18-control standard and an adoption checklist.

4. Forms and Workshop Templates

10 editable Word forms (F01–F10) and a five-session AI Governance Design Lab with facilitator notes.

5. Prompt and Guardrail Library

24 prompts for PMO work, each with a delegation ceiling and checks before use. PDF + Word.

6. Leadership Deck, Quick-Start and Business Case

14 editable slides with speaker notes, a one-page 30/60/90 plan and an optional internal business case.

Written by Sean T. Benson, PMP, LSSBB: 21-year U.S. Marine Corps veteran, former Director of IT PMO at Palomar Health, professor at National University, and author of Establishing A PMO: A Guidebook for Project Management Professionals.

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This kit provides general guidance on governing the use of artificial intelligence in project, program, portfolio and PMO work. It is not legal advice and is not a substitute for advice from qualified legal, privacy, security, compliance or audit professionals. Using it does not make an organization compliant with any law, regulation or standard, and it does not provide or imply certification. References to laws and frameworks are general summaries as of November 2026 and can change; confirm what applies to your organization, jurisdiction and use case with counsel. Risk tiers, scores, weights, thresholds and test criteria are illustrative starting points, not validated benchmarks. Outcomes depend on your organization and how the guidance is applied; no result is guaranteed. Example rows, organizations, vendors and figures are fictional.

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