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SBM1105 Strategic Project, Program and Portfolio Management

UOS CODE SBM1105	UOS NAME Strategic Project, Portfolio and Program Management	CREDIT POINTS 6	STATUS Advanced

SUMMARY	In this unit program management is taken as: 1. Strategic management of large projects, particularly major defence, urban renewal, infrastructure, industrial and mining ventures, sometimes involving innovative technologies and fairly long duration; 2. Alignment, coordination and management of a collection of related projects that aim to deliver a set of particular organizational outcomes which will otherwise be difficult to achieve through individual management of the constituent projects. Portfolio management is taken to be the grouping of a collection of programs or projects which may or may not be interdependent, but in aggregate contribute to or deliver a defined set of strategic objectives. Thus, portfolio management is one level higher than program management. Decisions on constituent projects of a program always link back to the strategy of the organization either directly or through the relevant portfolio. This course unit will address strategic project, program and portfolio management (P3M). Optimum design of P3M commences with the appraisal or confirmation of organisation's strategic goals and adoption of a related management philosophy and framework, through to setting up information and support systems and development of the required underpinning competencies. All program management decisions over program life cycle need to relate to strategic objectives. Under this approach strategic objectives are used to align and or integrate both downstream and upstream processes, information sets, teams and activities. Students will be exposed to the latest concepts, systems and techniques which will assist in the implementation of strategic project/program management methodology in the field. The unit will cover: • Introduction to program management philosophy and framework, and comparison with traditional approaches to management of large projects; • The contemporary models of program management (e.g. defence, aerospace, construction, etc.) • Formulation/confirmation of program goals and strategies; • Decision evaluation and optimization techniques including risks and uncertainty management; • Managing the project operability, quality and functionality • Management of due diligence and long term liabilities within an integrated program/project management framework.
UNIT CONVENOR COURSE TUTOR	Professor A Jaafari
ASSUMED KNOWLEDGE	Command of the contemporary project management knowledge

APPROXIMATE WORKLOAD	Lectures Workshops	Team Work	Personal Work	Readings
	20 hours	>60 hours	>60 hours	>30 hours

PRE-REQUISITE (course name)	SBM1101 or equivalent knowledge
OBJECTIVES	Upon completion of the course, the student should demonstrate: ⊕ a sound knowledge of contemporary literature and methods of approach to program management, portfolio management including strategic management of large projects ⊕ competency in defining program life cycle, designing relevant managerial systems, organization design and execution of programs within a strategic framework ⊕ ability to approach front-end (formulation) phase of programs and how to ensure that strategic objectives are properly constituted, considering the prevailing risks and uncertainties ⊕ know how to shape the downstream phases in line with strategic goals and policies, applying the relevant program strategies and managing risks and uncertainties effectively ⊕ competency in appraising and realigning programs over their life cycle and ensuring constant value addition and risk reduction in line with strategic objectives

	⊕ a good understanding of leadership and change management competencies needed to lead programs over their life cycle
TARGET COMPETENCIES (Project and Program Management))	**Program strategic goals & criteria** • Ability to set or appraise/confirm or define program goals, needs, requirements, context, stakeholders, statutory and regulatory issues and other critical influences • Ability to define/select and set targets (criteria) for both program performance assessment in terms of business & strategic objectives and implementation efficiency & effectiveness **Program policies & systems** • Ability to adopt/set appropriate implementation standards/model practices and procurement policies and models • Ability to adapt/apply IT-based tools for the purpose of assessing and integrating solutions optimally at program and or portfolio levels • Ability to develop and set up appropriate communication and decision making processes & procedures as well as managerial and administrative infrastructure **Program planning** • Ability to identify key success factors, formulate innovation strategies considering opportunities and constraints, strengths and threats • Know how to structure program/ portfolio into constituent projects/ activities for optimum achievement of goals • Ability to apply the selected implementation strategies and formulate program master schedule, develop control and change management strategies and estimate resource needs & requirements • Ability to develop optimum resource acquisition strategies and plan for critical resources **Program implementation** • Ability to acquire & mobilise the relevant resources, organise teams & implement the program • Ability to set up coordination and integration systems and implement communication and administrative processes, procedures & protocols • Ability to lead the program implementation at high level (managing upstream & outward) incl. effective communication with the key players and stakeholders • Ability to assess program decisions quickly and optimise outcomes in terms of strategic goals • Ability to inspire, lead and motivate the entire program personnel, secure timely contributions, resolve discontent and dissatisfaction, and generally develop positive energy and align activities with the program vision **Program assessment & continuous alignment** • Ability to assess/measure program performance in terms of both business & strategic objectives and implementation efficiency & effectiveness • Ability to identify performance shortcomings vis-à-vis goals & targets, prioritise these, develop & implement response plans
TARGET COMPETENCIES (Personal and Socio-cultural)	• Generic: All competencies that are common to all professionals (including cognitive and communication abilities, problem solving and analytical mindset) • Leadership: Ability to direct, motivate & manage individuals & teams. • Commitment: Ability to dedicate to tasks & to project outcomes. • Attitude: Ability to create the right frame of mind that promotes integrity & support for achievement of project goals within a social context. • Self Direction: Ability to manage witin and without guidelines & processes, and to work without supervision. • Learning: Ability to commit to continuous improvement in knowledge, skills & attitude, & to creating new knowledge developing skills & approaches. • Cultural Empathy: Ability to respect for & accommodation of individual lifestyle, beliefs & norms. • Creativity & Innovation: Capacity to generate new ideas/approaches & make them happen.
MODES OF DELIVERY	• Upfront intensive workshop (5 days) • Project and team based flexible work facilitated via the Internet (over 10 weeks) • Face-to-face formal assessment (2 weeks)
ASSESSMENT	1. Formal knowledge test 2. Team project submissions (formatted as per specification for the same)

3.   Formal unit of study competency assessment
4.   Formal Leadership & Socio-cultural competency assessment

	PRESCRIBED FOR THE COURSE	*SELECTED REFERENCES*
PRINTED MATERIALS	**Learning material (lecture notes, slides, case study and other material provided online).** **Published papers on strategic project management authored by Prof. Jaafari and his research team** Jaafari, A. (2004). Modelling Complex Projects, Chapter 13 of **The Wiley Guide to Managing Projects** Pinto and Morris (eds). John Wiley & Sons. www.wiley.com **Thiry, M.** (2003) Programme Management, Ch. 11 Project Management Pathways, APM PMI. (2003). **Organizational Project Management Maturity Model (OPM3™)** **Central Computer and Telecommunications Agency (CCTA)** (1999) Managing Successful Programmes 'HMSO Publications', London. **Brief for team projects** **Other learning materials and resources provided online.**	**Artto, K.A., Martinsuo, M and Aalto, T.,** (2001) Project Portfolio Management, PMA Finland, ISBN 951-22-5594-4 **Central Computer and Telecommunications Agency (CCTA)** (1994) Programme Management Case Studies: Volume 1, ISBN: 0 11 330666 0 **Turner, J.R. and Simister, S.J.,** (2000). *Gower Handbook of Project Management, 3rd edition* Gower Publishing. **Kaplan, R.S. and Norton, D.P.** (1996) "Using the Balanced Scorecard as a Strategic Management System", *Harvard Business Review*, Harvard College, Jan.-Feb. 1996, pp.75-85 Bentley, C. (2012). Prince 2 Pocket Guide Roberts, P. (2012). Strategic Project Management Simerson, B. K. (2011). Strategic Planning: A Practical Guide to Strategy Formulation and Execution Thiry, M. (2010) Program Management Taborda, L. (2012). Enterprise Release Management, Agile Delivery of a Strategic Change Portfolio Petit, Y. & Hobbs, B. (2012). Project Portfolios in Dynamic Environments: Organizing for Uncertainty PMI. (2013). Organizational Project Management Maturity Model (OPM3), Third Edition. **Selected references from EBSCO e-books:** A Guide to the Project Management Body of Knowledge (PMBOK Guide) The Standard for Program Management, Third Edition The Standard for Portfolio Management, Third Edition Program Management 24 : Most Asked Questions: What You Need to Know Fundamentals of Program Management : Strategic Program Bootstrapping for Business Innovation and Change Program Management Fundamentals of

		Effective Program Management : A Process Approach Based on the Global Standard
WEB SITES	**Programme Management Maturity Model Questionnaire** : http://www.e-programme.com/pmmm.htm	Students are expected to research both literature and internet sources for this unit of study. The following is a sample of relevant web sites: www.ogc.gov.uk/sdtoolkit http://appl.arc.nasa.gov/about/about_home.htm http://www.dsmc.dsm.mil/pubs/pubsgen.htm http://www.e-programme.com/ http://ebiz.netopia.com/pmo http://www.e-programme.com/articles/what_is_pm.htm:
Software	TBA	

COURSE CONTENTS

Intensive Phase

Day 1:   **Workshop Starts: 9:00**

9:00 – 10:00   **Introduction** to course aims, objectives, target competencies, learning strategies, resources available, timetable and deliverables, assessment methods and related briefings

10:00-11:00   **Lecture 1**: Strategic Management Overview

11:00-11:30   **Break**

11:30-12:30   **Lecture 2**: Business Context of Portfolio Management

12:30 – 13:30   **Tutorial 1**: Tutorial on program management strategies

Day 2:   **Workshop Starts: 9:00**

9:00 – 10:00   **Lecture 3**: Moving between Planning and Execution

10:00-11:00   **Presentation on Tutorial 1**

11:00-11:30   **Break**

11:30-12:30   **Lecture 4:** Selection & Prioritisation in PPM

12:30 – 13:30   **Tutorial 2**: Effective implementation of the programs

Day 3:   **Workshop Starts: 9:00**

9:00 – 10:00   **Lecture 5:** Monitoring & Adjusting Project/Program Pipeline in PPM

10:00-11:00   **Presentation on Tutorial 2**

11:00-11:30   **Break**

11:30-12:30   **Lecture 6**: P3M Decision Support Tools

12:30 – 13:30   **Tutorial 3**: Performance assessment and design of improvement strategies

Day 4:   **Workshop Starts: 9:00**

9:00 – 10:00   **Lecture 7**: P3M Life Cycle Management and Execution

10:00-11:00   **Presentation on Tutorial 3**

11:00-11:30   **Break**

11:30-12:30   **Lecture 8**: P3M Competency and Culture

12:30 – 13:30   **Tutorial 4**: Assessing current competencies in project/program/portfolio management

Day 5:   **Workshop Starts: 9:00**

9:00 – 10:00   **Presentation on Tutorial 4**

10:00-11:00   Revision of lectures 1 to 8

11:00-11:30   **Break**

11:30-12:30   Group work or sample test

12:30 – 13:30   Presentation of group work, sample test solution and workshop feedback

Teamwork phase

A structured learning program will be applied; in summary form it will comprise:

- An overall process for studying strategic project/program/portfolio management and applying the same to a real life case as advised in the unit's web site;
- A program of the learning activities which are part of student's Team Workplan and individual competency acquisition which each student need to conduct flexibly within the unit of study timeline as advised in the unit's web site (detailed schedules are to be developed and submitted as part of the Team Work/QA Plan)
- The assignment Brief which is available as a downloadable file.

The Learning activities are designed for each team to develop and evaluate a complete manual* for project/program/portfolio management for their case organisation via the following activities:

Assessment of learning styles and team roles, and balancing of team development of self management and socio-cultural/teamwork competencies				
Team Formation, Case Organisation Selection and team QA/Workplan	**Activity 1** Literature Review on Strategic Project, Program & Portfolio Management	**Activity 2** Case Org. Strategic P3M System Needs & Optimum P3M Selection	**Activity 3** Investigation of Actual P3M System vs. Optimum System	**Activity 4** Final Investigation of Case Project P3M Shortcomings & Improvements
Case Project Summary, QA/Workplan	Submit Assignment 1	Submit Assignment 2	Submit Assignment 3	Submit Assignment 4
Continuous reflection, self and peer assessment and competency acquisition. Final Individual Report and Viva to validate competencies acquired versus target competencies				

*. The deliverables of activities 2-4 from the project phase will vary depending on the case organisation and or industry context's specific needs and requirements and other situational factors.

COMPETENCY VALIDATION (via evidence and professional interview)	**Final Report & assessment** Each student must plan to progressively acquire, develop and document target managerial and leadership/socio-cultural competencies. The protocols on the web site for this purpose need to be followed carefully to prepare the required evidence of competency acquisition. The evidence for this unit to comprise a final report in two parts to validate individually the following: Specified target competencies and Leadership and Socio-cultural competencies. These will be assessed separately and both need to show the student's development history using the student's L&D plan as the basis.