



## SBM1105 Strategic Project, Portfolio and Program Management

<b>UOS CODE</b> SBM1105	<b>UOS NAME</b> Strategic Project, Portfolio and Program Management	<b>CREDIT POINTS</b> 6	<b>STATUS</b> Advanced
<b>SUMMARY</b>	<p>The US-based Project Management Institute released OPM3™ (Organizational Project Management Maturity Model) in 2003 as a Standard. OPM3™ states: <i>“Group of projects sometimes constitute a program, which is a group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. Programs may include elements of related work outside of the scope of the discrete projects in the program.... Similarly a portfolio is a collection of projects and/or programs and other work that are grouped together to facilitate effective management of that work to meet strategic objectives. The projects or programs of the portfolio may not necessarily be interdependent or directly related.”</i> These definitions for program and portfolio management are helpful and have been adopted for this unit of study and the entire MBPM program. As large complex projects often exhibit the same characteristics as programs and should be approached from a strategic perspective, they are not separately studied. The application of the body of knowledge on management of these projects can improve program management practices markedly. In this unit program management is taken as:</p> <ol style="list-style-type: none"> <li>1. Strategic management of large projects, particularly major defence, urban renewal, infrastructure, industrial and mining ventures, sometimes involving innovative technologies and fairly long duration;</li> <li>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.</li> </ol> <p>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.</p> <p>This course unit will address appraisal or confirmation of strategic goals and adoption of management philosophy and frameworks, setting up information and support systems and development of the underpinning competencies required. It makes a case for relating all program management decisions over program life cycle to strategic objectives. Under this approach strategic objectives are used to align and or integrate both downstream and upstream processes, information, 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:</p> <ul style="list-style-type: none"> <li>• Introduction to program management philosophy and framework, and comparison with traditional approaches to management of large projects;</li> <li>• The contemporary models of program management (e.g. defence, aerospace, construction, etc.)</li> <li>• Formulation/confirmation of program goals and strategies;</li> <li>• Decision evaluation and optimization techniques including risks and uncertainty management;</li> <li>• Managing the project operability, quality and functionality</li> <li>• Management of due diligence and long term liabilities within an integrated program/project management framework.</li> </ul>		
<b>COURSE CONVENOR</b> <b>COURSE TUTOR</b>	Professor A Jaafari, ME, MSc, PhD, FIEAust, CPEng TBA		
<b>ASSUMED KNOWLEDGE</b>	Command of the contemporary project management knowledge		



<b>APPROXIMATE WORKLOAD</b>	<b>Lectures Workshops</b>	<b>Team Work</b>	<b>Personal Work</b>	<b>Readings</b>
	30 hours	>30 hours	>50 hours	>30 hours
<b>PRE-REQUISITE</b> <i>(course name)</i>	Recommended all core and PM1002 and 2002			
<b>OBJECTIVES</b>	<p>Upon completion of the course, the student should demonstrate:</p> <ul style="list-style-type: none"> <li>• Sound knowledge of contemporary literature and methods of approach to program management, portfolio management including strategic management of large project</li> <li>• Competency in defining program life cycle, designing relevant managerial systems, organization design and execution of programs within a strategic framework</li> <li>• 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</li> <li>• 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</li> <li>• Competency in appraising and realigning programs over their life cycle and ensuring constant value addition and risk reduction in line with strategic objectives</li> <li>• Good understanding of leadership and change management competencies needed to lead programs over their life cycle</li> </ul>			
<b>TARGET COMPETENCIES</b> <i>(Project and Program Management)</i>	<p><b>Program strategic goals &amp; criteria</b></p> <ul style="list-style-type: none"> <li>• Ability to set or appraise/confirm or define program goals, needs, requirements, context, stakeholders, statutory and regulatory issues and other critical influences</li> <li>• Ability to define/select and set targets (criteria) for both program performance assessment in terms of business &amp; strategic objectives and implementation efficiency &amp; effectiveness</li> </ul> <p><b>Program policies &amp; systems</b></p> <ul style="list-style-type: none"> <li>• Ability to adopt/set appropriate implementation standards/model practices and procurement policies and models</li> <li>• Ability to adapt/apply IT-based tools for the purpose of assessing and integrating solutions optimally at program and or portfolio levels</li> <li>• Ability to develop and set up appropriate communication and decision making processes &amp; procedures as well as managerial and administrative infrastructure</li> </ul> <p><b>Program planning</b></p> <ul style="list-style-type: none"> <li>• Ability to identify key success factors, formulate innovation strategies considering opportunities and constraints, strengths and threats</li> <li>• Know how to structure program/ portfolio into constituent projects/ activities for optimum achievement of goals</li> <li>• Ability to apply the selected implementation strategies and formulate program master schedule, develop control and change management strategies and estimate resource needs &amp; requirements</li> <li>• Ability to develop optimum resource acquisition strategies and plan for critical resources</li> </ul> <p><b>Program implementation</b></p> <ul style="list-style-type: none"> <li>• Ability to acquire &amp; mobilise the relevant resources, organise teams &amp; implement the program</li> <li>• Ability to set up coordination and integration systems and implement communication and administrative processes, procedures &amp; protocols</li> <li>• Ability to lead the program implementation at high level (managing upstream &amp; outward) incl. effective communication with the key players and stakeholders</li> <li>• Ability to assess program decisions quickly and optimise outcomes in terms of strategic goals</li> <li>• 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</li> </ul>			



	<b>Program assessment &amp; continuous alignment</b>	
	<ul style="list-style-type: none"> <li>Ability to assess/measure program performance in terms of both business &amp; strategic objectives and implementation efficiency &amp; effectiveness</li> <li>Ability to identify performance shortcomings vis-à-vis goals &amp; targets, prioritise these develop &amp; implement response plans</li> </ul>	
<b>TARGET COMPETENCIES (Personal and Socio-cultural)</b>	<ul style="list-style-type: none"> <li>Generic: All competencies that are common to all professionals (including cognitive and communication abilities, problem solving and analytical mindset)</li> <li>Leadership: Ability to direct, motivate &amp; manage individuals &amp; teams.</li> <li>Commitment: Ability to dedicate to tasks &amp; to project outcomes.</li> <li>Attitude: Ability to create the right frame of mind that promotes integrity &amp; support for achievement of project goals within a social context.</li> <li>Self Direction: Ability to manage within and without guidelines &amp; processes, and to work without supervision.</li> <li>Learning: Ability to commit to continuous improvement in knowledge, skills &amp; attitude, &amp; to creating new knowledge developing skills &amp; approaches.</li> <li>Cultural Empathy: Ability to respect for &amp; accommodation of individual lifestyle, beliefs &amp; norms.</li> <li>Creativity &amp; Innovation: Capacity to generate new ideas/approaches &amp; make them happen.</li> </ul>	
<b>MODES OF DELIVERY</b>	<ul style="list-style-type: none"> <li>Upfront intensive workshop (4 days)</li> <li>Project and team based flexible work facilitated via the Internet (over 10 weeks)</li> <li>Face-to-face formal assessment (one week)</li> </ul>	
<b>ASSESSMENT</b>	<ol style="list-style-type: none"> <li>Formal knowledge test</li> <li>Team project submissions (formatted as per specification for the same)</li> <li>Formal unit of study competency assessment</li> <li>Formal Leadership &amp; Socio-cultural competency assessment</li> </ol>	
	<b>PRESCRIBED FOR THE COURSE</b>	<b>SELECTED REFERENCES</b>
<b>PRINTED MATERIALS</b>	<p>Learning material (lecture notes, slides, case study and other material provided online).</p> <p>Published papers on strategic project management authored by Prof. Jaafari and his research team</p> <p>Jaafari, A. (2004). Modelling Complex Projects, Chapter 13 of <b>The Wiley Guide to Managing Projects</b> Pinto and Morris (eds). John Wiley &amp; Sons. www.wiley.com</p> <p>Thiry, M. (2003) Programme Management, Ch. 11 Project Management Pathways, APM</p> <p>PMI. (2003). <b>Organizational Project Management Maturity Model (OPM3™)</b></p> <p>Central Computer and Telecommunications Agency (CCTA) (1999) Managing Successful Programmes 'HMSO Publications', London.</p> <p>Brief for team projects</p> <p>Other learning materials and resources provided online.</p>	<p>Artto, K.A., Martinsuo, M and Aalto, T., (2001) Project Portfolio Management, PMA Finland, ISBN 951-22-5594-4</p> <p>Central Computer and Telecommunications Agency (CCTA) (1994) Programme Management Case Studies: Volume 1, ISBN: 0 11 330666 0</p> <p>Turner, J.R. and Simister, S.J., (2000). <i>Gower Handbook of Project Management, 3rd edition</i> Gower Publishing.</p> <p>Kaplan, R.S. and Norton, D.P. (1996) "Using the Balanced Scorecard as a Strategic Management System", <i>Harvard Business Review</i>, Harvard College, Jan.-Feb. 1996, pp.75-85</p> <p>Thiry, M. (2002) "The Development of a Strategic Decision Management Model: An Analytic Induction research process based on the combination of project and value management." Proceedings of the PMI Research Conference in Seattle, July 2002</p> <p>Thiry, M. (2002) "FOR DAD: A Program Management Life-Cycle Process." Proceedings of the 5<sup>th</sup> PMI Europe Conference in Cannes, June 2002</p>



		<p><b>Thiry, M. (2002) "Combining value and project management into an effective programme management model." <i>International Journal of Project Management</i> , Elseveir Science, Oxford (Apr. 2002) Vol. 20-3, pp. 221-228.</b></p>
<b>WEB SITES</b>	<p><b>Programme Management Maturity Model Questionnaire :</b> <a href="http://www.e-programme.com/pmmm.htm">http://www.e-programme.com/pmmm.htm</a></p>	<p>Students are expected to research both literature and internet sources for this unit of study. The following is a sample of relevant web sites:</p> <p><a href="http://www.ogc.gov.uk/sdtoolkit">www.ogc.gov.uk/sdtoolkit</a>  <a href="http://appl.arc.nasa.gov/about/about_home.htm">http://appl.arc.nasa.gov/about/about_home.htm</a>  <a href="http://www.dsmc.dsm.mil/pubs/pubsgen.htm">http://www.dsmc.dsm.mil/pubs/pubsgen.htm</a>  <a href="http://www.e-programme.com/">http://www.e-programme.com/</a>  <a href="http://ebiz.netopia.com/pmo">http://ebiz.netopia.com/pmo</a>  <a href="http://www.e-programme.com/articles/what_is_pm.htm">http://www.e-programme.com/articles/what_is_pm.htm</a>:</p>
<b>Software</b>	N.A.	
<b>COURSE CONTENTS</b>	<p><b>Intensive Phase</b></p> <p><b>Day 1: Introduction and formulation phase</b></p> <ul style="list-style-type: none"> <li>• Introduction to course aims, objectives, target competencies, learning strategies, resources available, timetable and deliverables, assessment methods and related briefings</li> <li>• Briefing on how to conduct the entire unit of study</li> <li>• Lecture: Major projects, programs and portfolios, organizational settings and strategic frameworks</li> <li>• Lecture: Introduction to program management, including common understanding and models of practice such as LCPM, NASA (USA); DSMC/DAU (USA); World Bank and Office of Government Commerce (UK)</li> <li>• Lecture: Defining or confirming program vision, goals and benefits with reference to needs, requirements, context, stakeholders, statutory and regulatory constraints and other opportunities and challenges</li> <li>• Formulating program management strategies, including implementation strategies, constituent projects, KPIs, program master schedule and control strategies, resource acquisition strategies and organizational formation and mobilization strategies</li> <li>• Tutorial on program management strategies</li> </ul> <p><b>Day 2: Implementation phase</b></p> <ul style="list-style-type: none"> <li>• Lecture: Acquiring capabilities needed with emphasis on resource acquisition and effective engagement of the contributing organizations or departments</li> <li>• Lecture: Setting up systems, managerial infrastructure and relevant tools to manage the program over its life cycle</li> <li>• Lecture: Communication the program vision, leading and aligning projects teams and corporate activities</li> <li>• Tutorial and class discussion: Effective implementation of the programs</li> </ul> <p><b>Day 3: Appraisal and continuous alignment</b></p> <ul style="list-style-type: none"> <li>• Lecture: Assessing the performance of the program contents and its implementation</li> <li>• Lecture: Isolating performance shortcomings, prioritization and formulation of strategies to deal with the areas of poor performance</li> <li>• Tutorial and class discussion on performance assessment and design of improvement strategies</li> <li>• Lecture: Getting agreement on priorities, resolving conflicts and realigning the implementation activities</li> <li>• Lecture: Resolving conflicts, expediting decision making and encouraging innovation</li> </ul>	



	<p><b>Day 4: Reinforcing learning outcomes, knowledge tests and feedback</b></p> <ul style="list-style-type: none"> <li>Assessing current competencies in project/program/portfolio management</li> <li>Past test questions and discussion</li> <li>Reinforcing learning outcomes and application of the same to forthcoming team project</li> <li>Conduct of written test on fundamentals of project/program/portfolio management</li> <li>Students' feedback on the intensive phase</li> </ul>																				
	<p><b>Teamwork phase</b></p> <p>A structured learning program will be applied; in summary form it will comprise:</p> <ul style="list-style-type: none"> <li>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;</li> <li>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)</li> <li>The assignment Brief which is available as a downloadable file.</li> </ul> <p>The Learning activities are designed for each team to develop and evaluate a complete manual* for project/program/portfolio management for their case organization via the following activities:</p> <table border="1" data-bbox="453 846 1374 1227"> <tr> <td colspan="5" style="text-align: center;">Assessment of learning styles and team roles, and balancing of team development of self management and socio-cultural/teamwork competencies</td> </tr> <tr> <td style="text-align: center;">Team Formation, Case Project selection and team QA/Workplan</td> <td style="text-align: center;"><b>Activity 1</b> Best Practice Models vs. Case Project Requirements</td> <td style="text-align: center;"><b>Activity 2</b> Initiation Plan for Program Management System and Methodologies for Case Organisation</td> <td style="text-align: center;"><b>Activity 3</b> Detailed Plan for Program Management System and Methodologies for Case Organisation</td> <td style="text-align: center;"><b>Activity 4</b> Evaluation, Formatting and Presentation of Project Report</td> </tr> <tr> <td style="text-align: center;">Case Project Summary, QA/Workplan</td> <td style="text-align: center;">Submit Assignment 1</td> <td style="text-align: center;">Submit Assignment 2</td> <td style="text-align: center;">Submit Assignment 3</td> <td style="text-align: center;">Submit Assignment 4</td> </tr> <tr> <td colspan="5" style="text-align: center;">Continuous reflection, self and peer assessment and competency acquisition. Final Individual Report and Viva to validate competencies acquired versus target competencies</td> </tr> </table> <p>*. The Manual for Program Management must be tailor made to fit the needs of the case organization and its range of programs and portfolios. The manual must systematically address current literature and select and develop a systematic approach covering all phases of strategic management of projects/programs/portfolios.</p>	Assessment of learning styles and team roles, and balancing of team development of self management and socio-cultural/teamwork competencies					Team Formation, Case Project selection and team QA/Workplan	<b>Activity 1</b> Best Practice Models vs. Case Project Requirements	<b>Activity 2</b> Initiation Plan for Program Management System and Methodologies for Case Organisation	<b>Activity 3</b> Detailed Plan for Program Management System and Methodologies for Case Organisation	<b>Activity 4</b> Evaluation, Formatting and Presentation of Project Report	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				
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<p><b>COMPETENCY VALIDATION (via evidence and professional interview)</b></p>	<p><b>Final Report &amp; assessment</b></p> <p>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&amp;D plan as the basis.</p>																				