



Program & Project Assessment (P&PA)

Course Rationale:

Research and surveys from experts in the field of program and project management report that approximately half of projects fail to meet their objectives. Due to this shortfall, the products and services to be delivered are late, over budget, contain less scope, have less quality, and/or do not realize their benefits. While there continue to be positive developments in the field of project management, the delivery gap has not closed beyond that of a “coin flip”.

When properly planned and executed, Program & Project Assessments (P&PA) can provide timely performance feedback such that proactive measures can be used to address delivery shortfalls before they become significant issues. Unfortunately, many organizations fail to avail themselves of this risk mitigation strategy because they lack the framework necessary to provide a basis for identifying assessment objectives, processes, tools, outcomes, and benefits.

A recent independent survey¹ found that more than seventy percent of participants valued the concept of an independent, separate group of people designated to assist them in overseeing large-scale initiatives, as opposed to the oversight being performed by the same people doing the implementation.

The P&PA course provides a solid foundation for the establishment of an effective assessment framework. While aligned to the PMBOK®, the framework extends well beyond the limitations of a process based solution by incorporating elements missing from many project management approaches. Certification in Program & Project Assessment (CPPA) is available.

Sessions Offered:

Several variations of the P&PA course are offered in order to meet the specific needs of client organizations.

- ½ day Executive Overview
- 2 day Training
- 3 day Certification (includes the 2 day Training session plus a third day for the CPPA exam and certification readiness)

A 1 day Seminar that excludes group and team exercises as well as reference materials is also available for when time is a major issue or follow-up is planned.

¹ Results of the 2007 Independent Project Oversight Support Survey conducted at a Gartner CIO-level project portfolio management conference in Boston.

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Course Objectives:

The course will provide instruction and examples of

- How to use P&PA to manage delivery risks
- How to measure and assess project performance
- How to employ a balanced scorecard
- How to develop an effective Basis of Assessment (BOA)
- How to leverage Earned Value Management (EVM) to validate delivery results and expectations

During the course students will

- Examine and evaluate leading project management frameworks such as PMBOK® and PRINCE2®, and IT governance frameworks such as COBIT®
- Identify key features of an effective assessment framework
- Examine the PROJECTRx® project assessment framework
- Utilize the work breakdown structure (WBS) to define assessment life cycle, assessment milestone, and project components
- Identify assessment outcomes for the project and milestone components
- Make appropriate use of process work flows and worksheets to enhance the overall learning experience

Course Sections:

1. Introduction

- 1.1. The Business Problem
- 1.2. Obstacles and Challenges
- 1.3. The Opportunity
- 1.4. Program & Project Assessment (P&PA)
- 1.5. Key Features of an Assessment Framework

2. Project Management Frameworks

- 2.1. PMBOK® 4th Edition
- 2.2. PRINCE2® 2009

3. Assessment Framework / Life Cycle Alignment

- 3.1. PROJECTRx® Framework
- 3.2. COBIT® 4.1
- 3.3. Assessment Framework Comparison
- 3.4. Life Cycle Alignment

4. Work Breakdown Structure (WBS)

- 4.1. Define WBS Life Cycles
- 4.2. Define WBS Milestones
- 4.3. Define Project Components
- 4.4. Define Milestone Components
- 4.5. Populate Milestones

5. Assessment Life Cycles / Milestones

- 5.1. WBS Life Cycle Hierarchy
- 5.2. WBS Life Cycles
 - 5.2.1. Project Management (PMLC)
 - 5.2.2. Product Development (PDLC)
 - 5.2.3. Assessment Area (AALC)
- 5.3. WBS Milestone Hierarchy
- 5.4. WBS Life Cycle Mapping
- 5.5. Three-prong Milestone Strategy
 - 5.5.1. Tollgate Reviews
 - 5.5.2. Ongoing Performance Feedback
 - 5.5.3. Periodic Validation
- 5.6. Milestone Hierarchies

6. Balanced Scorecard

- 6.1. Process Perspective
- 6.2. Delivery Perspective
- 6.3. Business Case (Benefit Identification / Validation)
- 6.4. Benefit Management

7. Basis of Assessment (BOA)

- 7.1. Scope of Effort
- 7.2. Content
- 7.3. Milestone Strategy
- 7.4. Assessment Outcomes
 - 7.4.1. Project
 - 7.4.2. Milestone
- 7.5. Rating Methodology
 - 7.5.1. Rating Levels

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- 7.5.2. Rating Dimensions
- 7.5.3. Rating Metrics
- 7.5.4. Rating Criteria
- 7.5.5. Rating Exception
- 7.5.6. Metric Rollup and Summarization
- 7.5.7. Document Management

8. Process Flow / Best Practice / Integration

- 8.1. Assessment Process Work Flow
- 8.2. Best Practice Facilitation
 - 8.2.1. Lessons Learned
 - 8.2.2. Templates
 - 8.2.3. Examples
 - 8.2.4. Critical Success Factors (CSFs)
- 8.3. Framework Integration
 - 8.3.1. Process
 - 8.3.2. Tools
 - 8.3.3. People

9. Earned Value Management (EVM)

- 9.1. Integration with WBS Milestones
- 9.2. EVM Outcomes
- 9.3. Delivery Validation
- 9.4. Trend Analysis
- 9.5. EVM Process
 - 9.5.1. Performance Baseline
 - 9.5.2. Status / Performance Reporting
 - 9.5.3. EVM Results
- 9.6. Project Plan/Schedule Example

10. Assessment Mechanics

- 10.1. Assessment Principles
- 10.2. Oversight / Governance
- 10.3. Assessment Reporting
- 10.4. Assessment Components
- 10.5. Deployment Strategies

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The P&PA course is a product of ProjectRx, LLC, and will be offered through university and project management education partners. Additional information can be found on the ProjectRx website: www.projectrx.com.

The instructor is Ted Williams, owner and founder of ProjectRx, LLC. Ted has over thirty years of experience with the management, recovery, and oversight of large, business critical, and high risk programs and projects. Prior to ProjectRx, Ted was Group Vice President of the Project Audit Group for Cendant Corporation.

Key PMBOK® Knowledge Areas:

- Project Scope Management
- Project Time Management
- Project Cost Management
- Project Quality Management
- Project Risk Management
- Project Communication Management
- Project Integration Management

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