Course Syllabus
T54 PRJM 527, Strategies of Projects, Programs & Portfolios, Fall 2019
Master of Project Management
The Henry Edwin Sever Institute | School of Engineering & Applied Science
Washington University in St. Louis

COURSE OVERVIEW
This course addresses the strategic alignment and prioritization of projects, programs and portfolios with an organization’s business objectives and directions. Major areas covered include: stakeholder value, return on investment, balancing the tradeoff between project priorities and operational imperative business benefit; establish and implement program governance of multiple projects to ensure consistent alignment with organizational strategy; balancing and coordination of project resources across multiple projects; coordination of schedules among multiple projects; current trends and practices in Program and Project Portfolio Management.

The course material will be covered by means of discussion of the texts, additional articles, case studies, and lecture.

INSTRUCTOR OVERVIEW
Mike Fortin,
PMP, PMI-ACP, CSM, SAFe
mfortin@wustl.edu | 618-556-9093

Mike has 25 years of experience in managing and rescuing business critical projects. His experience spans IT, Manufacturing, Retail, Aerospace, Automotive, Metal-Rolling, Industrial Construction and Healthcare industries. He is a leader in delivering Lean concepts, tools and process to fortune 500 companies. The experience he acquired through implementing Lean in manufacturing has transitioned into the IT Agile development methodologies as well as advanced project, program and portfolio management techniques. He was instrumental in successfully standing up and managing three IT Portfolio Offices, a Program and Project Management office. He also managed several multimillion-dollar cross functional programs. Mike has a Masters Information Management (MIM) and a Masters in Project Management (MPM) from Washington University. He is a member of the Project Management Institute (PMI), Scrum Alliance, and holds the following certifications, Project Management Professional (PMP), Agile Certified Practitioner (ACP), Scrum Alliance Certified Scrum Master (CSM), Scaled Agile Framework (SAFe) SA, ITL Service Management, and Six Sigma Green Belt. He brings practical experience in the teachings of the material throughout the course.

LEARNING OBJECTIVES
- Understand the functional distinctions between project, program, portfolio and product management and the essential operational elements of each from a project perspective.
- Understand the business value of program, portfolio and product management.
- Understand and develop the essential aspects of critical thinking as related to project management and leadership.
• Trends and changes in managing Programs and Portfolio’s with Agile Methodologies
• SAFe Program and Lean Portfolio Management
• Build reports and perform program and portfolio reviews

CLASS MEETING
• Time: Tuesday, 6:00PM – 9:00PM
• Location: Urbauer 210

CLASS TEXTS / MATERIALS / TOOLS

Required:

GRADE COMPOSITION

<table>
<thead>
<tr>
<th>Major Coursework Components</th>
<th>Component Proportion</th>
<th>Coursework Sub-component</th>
<th>Sub-component Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participation</td>
<td>20%</td>
<td>Team Contribution</td>
<td></td>
</tr>
<tr>
<td>Homework Assignments</td>
<td>40%</td>
<td>Reports</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Assignments</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Presentations</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Team Lead</td>
<td>10%</td>
</tr>
<tr>
<td>Tests</td>
<td>30%</td>
<td>Mid Term</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Final</td>
<td>15%</td>
</tr>
<tr>
<td>Quizzes</td>
<td>10%</td>
<td>Online</td>
<td></td>
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</tbody>
</table>

COURSEWORK COMPONENTS DESCRIPTIONS

Course Structure:
A major portion of the course will involve presentation and discussion of the course material.

Chapter Critical Reviews & Discussions:
Chapters will be assigned for most sessions. The chapters should be read by everyone prior to the assigned discussion class session. Additionally, there will be quizzes on the assigned readings. Students should be prepared to discuss the readings and white paper assignments. The class discussion will focus on critical analysis or thinking (Bloom’s Taxonomy) regarding the topics. Each student will be given a limited amount of time to summarize their critical analysis thoughts on the concepts studied.
Collateral References or Supporting Articles:
As part of the class participation and discussion each student should provide references to published articles i.e. Gartner, Harvard Business Review, and other professional sources. This material will be used to reinforce the topics covered in class lectures.

Final:
A final exam will be required on the last day of class. The exam will cover all lectures and readings assigned throughout the semester.

GRADING POLICIES

- Late Assignments
  - Assignments are due at the beginning of class on the day specified. This is especially important because some assignments will be presented and/or discussed in class. Failure to submit the assignment on time will result in being under-prepared for class discussion, which will impact your grade.
  - The grading for late work will be deducted one letter grade increment (from a A to a B, for example) for each day late. Late assignments will be accepted with penalty up to one week after the due date. It is up to you to determine the version of your assignment to be graded. You must weigh the late penalty against the completeness of your assignment. No work can be accepted after the final day of class since grades must be turned into the university. Assignments completed during class time cannot be made up.
  - Instructor-granted extensions can be considered only in exceptional situations. Such extensions are granted rarely.

- Attendance
  - You are part of a professional, graduate program. Because much of this course involves in-class demonstrations and team activities, participation constitutes a significant portion of the course grade. Therefore, attendance is expected and is a large factored into your final grade. Missing in class activities will have a negative impact on your final grade. If you know you are going to be absent, contact the instructor in advance.

- Extra Credit
  - Extra credit is not available in the course. Students are provided with significant time to prepare the write ups and presentations.
Grading Scale:

<table>
<thead>
<tr>
<th>Letter Grade</th>
<th>%</th>
<th>Points Toward GPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>≥ 97%</td>
<td>4.0</td>
</tr>
<tr>
<td>A</td>
<td>93% - 97%</td>
<td>4.0</td>
</tr>
<tr>
<td>A-</td>
<td>90% - 92%</td>
<td>3.7</td>
</tr>
<tr>
<td>B+</td>
<td>87% - 89%</td>
<td>3.3</td>
</tr>
<tr>
<td>B</td>
<td>83% - 86%</td>
<td>3.0</td>
</tr>
<tr>
<td>B-</td>
<td>80% - 82%</td>
<td>2.7</td>
</tr>
<tr>
<td>C+</td>
<td>77% - 79%</td>
<td>2.3</td>
</tr>
<tr>
<td>C</td>
<td>73% - 76%</td>
<td>2.0</td>
</tr>
<tr>
<td>C-</td>
<td>70% - 72%</td>
<td>1.7</td>
</tr>
<tr>
<td>D+</td>
<td>67% - 69%</td>
<td>1.3</td>
</tr>
<tr>
<td>D</td>
<td>65% - 66%</td>
<td>1.0</td>
</tr>
<tr>
<td>F</td>
<td>&lt; 65%</td>
<td>0.0</td>
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**COURSE SCHEDULE**

<table>
<thead>
<tr>
<th>Week # Date</th>
<th>Theme / Topics</th>
<th>Learning Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Introduction</td>
<td>Class expectations, Course Objectives, Basics of Projects, Programs and Portfolio’s</td>
</tr>
<tr>
<td>2</td>
<td>It's About the Business</td>
<td>Program Characteristics and the relationship among Programs, Portfolio’s, and Projects. Aligning Programs to Business Strategy</td>
</tr>
<tr>
<td>3</td>
<td>Delivering the Whole Solution</td>
<td>Complexity, System Thinking, Integrated Program Team, Managing a Program</td>
</tr>
<tr>
<td>4</td>
<td>Program Practices, Metrics, and Tools</td>
<td>Benefits Management, Program Tools, Dashboards and Reporting</td>
</tr>
<tr>
<td>5</td>
<td>Being a Program Manager</td>
<td>Competencies, Leadership, Integrator, Leading Teams</td>
</tr>
<tr>
<td>6</td>
<td>Organizational Considerations</td>
<td>Transitioning to Program Management, Executing Programs, PMO’s, Measuring PMO’s</td>
</tr>
<tr>
<td>7</td>
<td>Portfolio Concepts</td>
<td>What and Why, Value, Balancing, Communications, Alignment</td>
</tr>
<tr>
<td>8</td>
<td>Portfolio Filters</td>
<td>Funnel, Value Assessments, Financials, Portfolio Objectives</td>
</tr>
<tr>
<td>9</td>
<td>Portfolio Management</td>
<td>Project Portfolio Management, Portfolio Strategy Development, Establishing Governance,</td>
</tr>
<tr>
<td>10</td>
<td>Designing a Portfolio</td>
<td>Evaluation Criteria, Triple Constraint Balancing, Building and Calibrating a Portfolio</td>
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</tbody>
</table>
### I. POLICIES TO BE INCLUDED AT THE INSTRUCTOR’S DISCRETION

**Use of Laptop Computers and Electronic Devices in the Classroom**

Laptop & tablet computers, smart phones and other electronic devices can be helpful in taking notes, providing tools for course exercises and referencing course related materials. However, they can also be distracting when used for non-course related activities such as emailing & texting, posting on social media, reading news sites, shopping online, or looking at YouTube videos. Some students have even been observed working on class assignments for the same or other courses. As common sense suggests, and a March 2013 study by Faria Sana, Tina Weston and Nicholas J. Cepeda confirmed, students who are multitasking during class have less understanding and recall of what’s being discussed. The study also found that “participants who were in direct view of a multitasking peer scored lower on a test compared with those who were not.” *

As mentioned earlier this course is part of a professional, graduate program. Consequently, it is expected that students conduct themselves in a professional manner. This includes being engaged in the class proceedings, by attentive listening, critical thinking, asking appropriate questions and participating in active discussion. Your attendance and participation in class is important for the class and is expected to be more than just physical attendance. Engaging in non-class related activities during class time is not acceptable and disrespectful of the lecturer and other students.

*Reference the Wall Street Journal article: I’m Banning Laptops from My Classroom, July 10, 2016 by Stuart Green

*Reference the WashU Teaching Center Article [https://teachingcenter.wustl.edu/resources/course-design/developing-course-policies-on-laptops-mobile-devices/](https://teachingcenter.wustl.edu/resources/course-design/developing-course-policies-on-laptops-mobile-devices/)*

**Privacy and Security**

Recording of class sessions either audio or video is prohibited without permission from the instructor and the other class members.

**Collaboration:**

With the exception of your team projects, all assignments are to be completed on your own. You are encouraged to discuss ideas and techniques broadly with other class members, but all written or presentation work, whether in preliminary or final form, is to be generated by you working alone. If in doubt - *ask.*

**Language Sensitivity**
When in the classroom, all students should speak English at all times. While meeting with classmates on a classroom project, speak a language that every student present (in your group) understands, without exception.

Professionalism:
You are part of a professional, graduate program. Consequently, it is expected that students conduct themselves in a professional manner. This includes being on time for classes and meetings, being prepared, and participating in class discussions, group activities, projects, etc. The level of professionalism you exhibit throughout the course will impact your final grade. It directly affects the participation portion of the grade but is also taken into consideration in all other aspects of the course as it reflects the overall quality of professional performance.

II. SEVER/UNIVERSITY POLICIES

Ethics of Academic Integrity (SEAS)
All students in the School of Engineering & Applied Science are expected to conform to high standards of conduct. This statement on student academic integrity is intended to provide guidelines on academic behaviors which are not acceptable.

Engineering courses typically have many problem sets assigned as homework. You are not allowed to collaborate when solving homework problems, performing lab experiments, writing or documenting computer programs, or writing reports unless the instructor specifically states otherwise.

It is dishonest and a violation of academic integrity if:

1. You turn in work which is represented as yours when in fact you have significant outside help. When you turn in work with your name on it, you are in effect stating that the work is yours, and only yours.
2. You use the results of another person’s work (exam, homework, computer code, lab report) and represent it as your own, regardless of the circumstances.
3. You request special consideration from an instructor when the request is based upon false information or deception.
4. You submit the same academic work to two or more courses without the permission of each of the course instructors. This includes submitting the same work if the same course is retaken.
5. You willfully damage the efforts of other students.
6. You use prepared materials in writing an in-class exam except as approved by the instructor.
7. You write on or make erasures on any test material or class assignment being submitted for re-grading.
8. You collaborate with other students planning or engaged in any form of academic dishonesty.
9. You turn in work, which is represented as a cooperative effort, when in fact you did not contribute your fair share of the effort.

10. You do not use proper methods of documentation. For example, you should enclose borrowed information in quotation marks; acknowledge material that you have abstracted, paraphrased or summarized; cite the source of such material by listing the author, title of work, publication, and page reference.

III. WASHINGTON UNIVERSITY IN ST LOUIS SUPPLEMENTAL RESOURCES

1. Disability Resources: If you have a disability that requires an accommodation, please speak with instructor and consult the Disability Resource Center at Cornerstone (cornerstone.wustl.edu). Cornerstone staff will determine appropriate accommodations and will work with your instructor to make sure these are available to you.

2. English writing support: For additional help on your writing, consult the expert staff of The Writing Center (writingcenter.wustl.edu) in Olin Library (first floor). It can be enormously helpful to ask someone outside a course to read your essays and to provide feedback on strength of argument, clarity, organization, etc. < The Engineering Communication Center http://engineering.wustl.edu/current-students/student-services/Pages/default.aspx offers students in the School of Engineering and Applied Sciences help with oral presentations, writing assignments, and other communications projects, as well as job-search documents such as resumes and cover letters>

3. English competence: Students are encouraged to check their grammar and spelling before submitting their written works. Although, students are free to choose whatever the tools that best fit their need, some of the common tools for grammar & spelling checking, citation making in different writing styles can be found in the list below.
   d. http://www.citationmachine.net – Citation Machine [Free & Paid Service]

4. Bias reporting: The University has a process through which students, faculty, staff and community members who have experienced or witnessed incidents of bias, prejudice or discrimination against a student can report their experiences to the University’s Bias Report and Support System (BRSS) team. See: brss.wustl.edu/

5. Mental health service: Mental Health Services’ professional staff members work with students to resolve personal and interpersonal difficulties, many of which can affect the academic experience. These include conflicts with or worry about friends or family, concerns about eating or drinking patterns, and feelings of anxiety and depression. See: shs.wustl.edu/MentalHealth
6. **Sexual Harassment**: Sexual harassment is a form of discrimination that violates university policy and will not be tolerated. It is also illegal under state and federal law. Title IX of the Education Amendments of 1972 prohibits discrimination based on sex (including sexual harassment and sexual violence) in the university's educational programs and activities. Title IX also prohibits retaliation for asserting claims of sex discrimination. The university has designated the Title IX Coordinator identified below to coordinate its compliance with and response to inquiries concerning Title IX.

For more information or to report a violation under the Policy on Discrimination and Harassment, please contact:

**Discrimination and Harassment Response Coordinators**
- Apryle Cotton, Asst. Vice Chancellor for Human Resources
  - Section 504 Coordinator
  - Phone: 314-362-6774
  - Email: apryle.cotton@wustl.edu
- Leanne Stewart, Employee Relations Manager
  - Phone: 314-362-8278
  - Email: leannerstewart@wustl.edu

**Title IX Coordinator**
- Jessica Kennedy, Director of Title IX Office
  - Title IX Coordinator
  - Phone: 314-935-3118
  - Email: jwkennedy@wustl.edu

You may also submit inquiries or a complaint regarding civil rights to the United States Department of Education's Office of Civil Rights at 400 Maryland Avenue, SW, Washington, DC 20202-1100 or by visiting the U.S. Department of Education website or calling 800-421-3481.