

Operational Level Cooperation Initiative (OLCI)

Towards a global body of project management knowledge

Lille, France

July 8 – 11, 2001

Hosted by ESC Lille

Document Control Information	
Initial Author	Diana Papas
Version No	0.3
Date	17 July 2001
Changes	Amended by Lynn Crawford, Mar 2002
Distribution List	OLCI Lille 2001 Attendees (refer p.3)

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Introduction

Aim

Consistent with the overall aim of the OLCI identified in June 1999:

- To work towards agreement on a global body of project management knowledge and the specific decision from the June 2000 workshop
- To develop an interactive web based global body of project management knowledge repository; the aim of the July 2001 workshop is:
- To develop some content of a global body of project management knowledge repository that will demonstrate the value of the OLCI approach.

List of Attendees

Name	Email	Country
Alicia Aitken	alicia@pmcompetence.net	Australia
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Christophe Bredillet	cbredillet@nordnet.fr	France
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Gilles Caupin	gillescaupin@compuserve.com	France
Bill Duncan	wrd@pmpartners.com	USA
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Brian Hobbs	hobbs.brian@uqam.ca	Canada
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Lew Ireland	lewireland@earthlink.net	USA
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Khim-Teck Yeo	mktyeo@ntu.edu.sg	Singapore
Konstantin Zukov	???	Ukraine

Apologies

Max Wideman.
Terry-Cook-Davies.

Day One, Monday 9 July 2001

Telenor Feedback

Feedback from Telenor on activities undertaken since the OLCI meeting in Haugesund, Norway in 2000, when the OLCI delegates provided specific advice to Telenor. Since the conference in Haugesund, Norway, Telenor has implemented initiatives as listed in John-Erik Hogberg's presentation document *Development of Telenor Project Culture; Feedback to OLCI, Lille 2001, v02*.

Business case

Presentation and discussion on the draft Business Case for proposed interactive web based knowledge repository, by Alicia Aitken.

Key points of proposed Business Case

Re-statement of OLCI Vision

To develop and document a structured set of shared concepts supported by common language and definitions that can (and will) be used by the project management profession to discuss, describe, debate and advance project management.

Proposed organisation structure

R&D committee of academics and industry leaders.
GBoPMK non profit organisation.
Internet site.

Proposed management structure

Elect a management team of max 3.
Establish research projects to be undertaken.
Convene best minds in project management to vet "knowledge".
Source funding and management of funds.
Run annual conferences.

Funding structure

Sponsorship and donation.
Major sponsor, foundation partners and industry sponsors.
Customised intranet service.

Major branding sponsorship.

The major branding sponsor would have a place on the Development Committee and lifetime foundation partner status.

Cost

- \$2.5 US million over 5 years

Foundation partners

Foundation partners would be life time partners of the GBoPMK, have their logo displayed on the web-site and be invited to join the Development Committee Cost.

- Host an annual three day conference

- Cash donation (greater than \$50,000 US) or
- Provide services to the GBoPMK.

Industry sponsors

Industry sponsors would have:

- Their logo displayed on every page containing their sponsored industry data

Cost

- Supply industry specific body of project management knowledge from internal sources or
- Sponsor the R&D for an industry or application area specific BoPMK
- \$50,000US per annum or \$200,000US every five years

Questions arising from the presentation of the Business Case

Issue	Strategic, tactical or operational
National focus?	S
Small companies in one country.	S
Not a project management association?	S
Global research conferences.	S
Change the name - GPMF??	O, eg framework
Mechanisms for control? Non profit and OLCI	S
The time has come to set up the organisation.	T
Exclusivity? Does middle organisation exist solely for OLCI? Value chain?	S
Marketing of the web site?	O
Criteria for sponsorships?	T
Who's the buyer?	S
Membership site?	No. We don't have paying members.
Tracking users.	O
Positioning Vs Gantthead.	T
Anonymous sponsors?	S
Positioning Vs other BOKs No – we are not developing one. We are only making a framework. We will connect to other BOKS.	S
Who are our stakeholders? What is our vision?	S
What is special: global, all views accepted, credibility.	T
What is our uniqueness? What value add?	T
What will the sponsors get for their investment?	T
What is the problem we are trying to resolve? Problem statement.	T
Open source? - ideas regarding intellectual property	O
Will major sponsor alienate others in same industry = sponsor vs. consortium.	S
\$2.5m is too low?	O
Standard vs. source of information – distilled information is raw data.	O
What products will we produce?	T
Necessary to get PM associations to buy in and how?	T
How to avoid dominance by individual sponsors?	S

Issue	Strategic, tactical or operational
Can professional associations be part of OLCI?	NO. Natural persons.
How do we decide information to point to?	O
Establish governance?	S
Are there alternatives to this?	No – value chain
Add vision to business case.	Yes
Access to knowledge is value?	Yes
Co-word analysis.	O
PM vs. systems management.	O
Portal vs. structure.	O
Sustainability.	S

As members of this organisation, you will be doing both representing your organisation and your personal views.

Discussion about strategic points

- Value and governance were identified as the key strategic points
- OLCI management committee
- Board of non-profit?
- Majority of board?
- Necessary to get PM associations to buy in and how?
- Have we done a stakeholder analysis?
- How to avoid dominance of individual sponsors
- Can professional associations be part of OLCI?
- Establishment of governance?
- Are there alternatives to do this?
- Three people to sit on the board?
- There was consensus to incorporate the organisation in Australia
- Members for non-profit?
- R&D committee of academics and industry leaders
- Non profit organisation
- Members of this group – desire to increase global representation and number of women. If we are successful in getting funding in the States, we need to establish rules
- Vision of the sponsorship – this is not advertising, it is not corporate sales
- Sponsors are using the site, are not selling their wares though the site
- A marketing plan would improve this
- A marketing plan involves a plan for going to the sponsors
- What does the sponsor get out of this site? Access to the knowledge and to the global leaders

Content for a GBoPMK

On Day One, following presentation and discussion of the draft Business Case, workshop attendees addressed the aim of this workshop:

- To develop some content of a global body of project management knowledge repository that will demonstrate the value of the OLCI approach.

The first step was to identify a manageable number of topics for which to develop content.

The following topics were identified, through brainstorming.

Topics identified for consideration:

1. Project qualification
2. Global interest and involvement
3. Global certification
4. Build and maintain company relations and communications
5. Project success and strategy
6. Capture lessons learned
7. QA and review cycles
8. From strategy to project
9. Concept of product based planning
10. PM as a full time or part time job
11. Requirements definition
12. Issue management
13. PM Education for senior management
14. PM for poorer countries
15. Roles and responsibilities of project participants
16. Benchmarking project results
17. Management of uncertainty and opportunity
18. How to build project culture
19. Recruiting of project managers
20. Features of a project office
21. Best project start ups
22. World class project management
23. Maturity models for PM
24. Improving PM for competencies over our lifetime
25. Features programme management versus project management
26. Productivity versus cost effectiveness in project driven organisations
27. Requirements and traceability management
28. Prioritising the project portfolio
29. Project size differences in managing small, medium, large projects
30. Specifics of the front end
31. Industries/professions where project management can't be used
32. Concept of operations
33. Different project life cycles
34. Individual versus team recognition
35. Further development of TOC
36. Project management Business to business – PM as a start up tool
37. Project cost control versus company accounting
38. How to educate and shape your steering committee
39. Project sponsor role
40. Features of project portfolio management
41. Project recovery
42. Critical path management
43. Basic PM features
44. Project taxonomy
45. Control gates and baseline management
46. Project management cartography (map)

From this list the following topics were selected, using nominal group technique, to be worked on during the workshop:

Topics selected for group discussion

1. From strategy to projects

2. Project office
3. Steering committee and project sponsors
4. Project portfolio management
5. Lessons learned

From strategy to projects

Developing a business plan for the project.

Project office

What it is a project office?

There are different project offices:

- Single
- Multiple
- Corporate – PSO, methodology, continuous improvement

Steering committee and project sponsors

- Issues specific to global and international projects
- Representation of stakeholders
- The project sponsor directs the steering committee

Project portfolio management

- Portfolio management – the alignment of project work with the project strategy.
- More than "on time on budget".
- Higher value projects?
- Innovation projects and risk management.

Lessons Learned

- Lessons learned - the knowledge acquired from experience that is noteworthy enough to make available to others.
- What are lessons learned? - mandatory to perform in the beginning, throughout and in end of PM process.
Why do lessons learned? - benefits eg potential Return of Investment (ROI), business case.
- Motivation/issues

Five teams were then formed to address these five priority topics. They were asked to produce / identify the following for their selected topic.

The Task

1. Document outline (synthesis/integration, identify further research for further enhancement and modify as required)
2. Plan for completion of task including assignments and dates.
3. Reviewers (proposed)
4. Acceptance criteria

Through discussion it was agreed that:

- Collaboration to consensus should be a guiding principle.
- Minority reports should be presented if relevant. It could be categorised by country or placed into context.

It was agreed that what was being produced was a guideline, not a standard, but the structure of an ISO standard was provided to give some guidance in approach:

Structure of an ISO

1. Scope
2. Normative references
3. Terms and definitions
4. Minority report

Day Two, Tuesday 10 July 2001

Content for a GBoPMK (cont.)

In the morning, groups continued to work on the five selected topics:

1. From strategy to projects
2. Project office
3. Steering committee and project sponsors
4. Project portfolio management
5. Lessons learned

Introduction of ESC Lille special challenges

ESC Lille, as host for the workshop, were invited to seek the input of workshop attendees to address 'special challenges' as was done for Telenor in 2000.

Topic for discussion:

Design of an international Masters and Professional Doctorate in PM (Christophe Bredillet).

The special challenges are:

1. How should we design the delivery process?
2. How should we fund:
 - a. Internship?
 - b. What is in it for the company?
3. What are the market needs for post-graduate and graduate study?
4. Entry requirements for the masters/doctoral program?

Some key points about the nature of the professional doctorate versus a traditional doctorate or PhD coursework were presented:

- Recognition of prior learning
- Demonstrate ability through pathways
- Professional doctorate is not just theoretical. It is practical. You have the option of doing it full or part time
- Opportunity for research within your company.
- You need to do an amount of coursework and subjects, which might include some Masters subjects as well as research methodology. 40% coursework and 60% research is proposed.
- Traditional PhD is usually a full time study program, undertaken after completing an honours degree or Masters by Research
- Professional doctorate may allow different entry pathways, and be undertaken part time. Professional doctorate candidates would be expected to have good research questions grounded in practice and good access to research data (eg organisational settings; professional / corporate networks etc).

Four groups were formed to discuss and provide feedback on the following topics.

Key topics for discussion:

1. Entry requirements
2. Learning options / delivery methods

3. Funding
4. Marketing

Day Three, Wednesday 11 July 2001

Recommendations for ESC Lille

Learning options / delivery methods – Group 1

This group asked Christophe Bredillet for some background information on the proposed course participants and were provided with the following information:

User CONOPS (from Christophe)

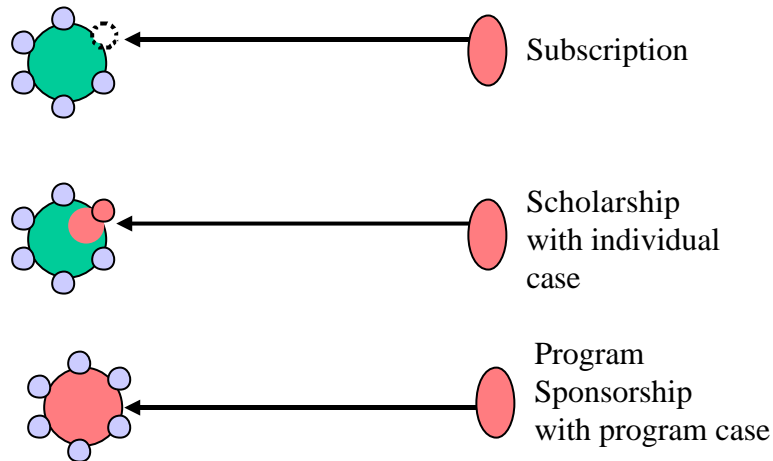
- 5-15 years experience
- Multi cultural experience
- Multidisciplinary
 - Some relevant
 - Some peripheral
- 4 quarter program, multiple starts
- 4 x / year international p to p
- English is language of learning
- Dynamic population change
- Bachelors degree
- May have zero PM and systems engineering
- All courses mandatory
- Thesis subject is selected by student
- Thesis is mandatory (approx. 400 hours)
- PMP and IPMA exams mandatory
- ISCE exam mandatory
- Passing of PMP, IPMA, ISCE exams not mandatory
- Possible to get
 - MPM
 - PMP
 - CPMP
 - CCE

Recommendations on learning options / delivery methods, to ESC Lille:

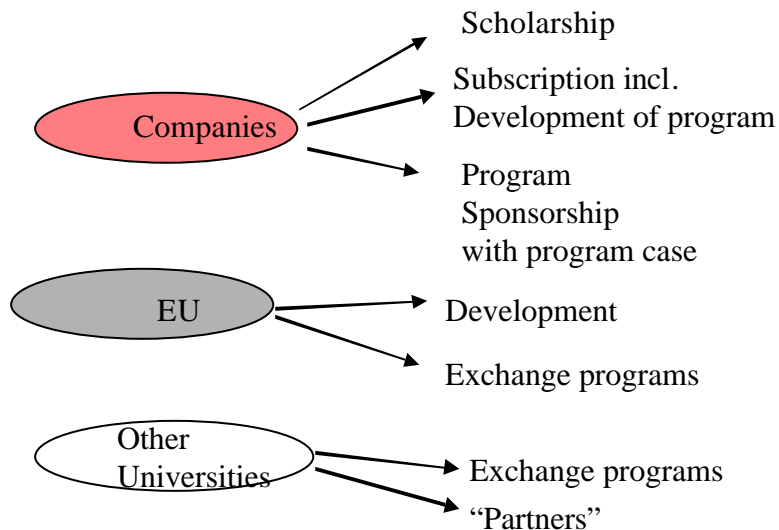
- Instructor in classroom
- Instructor led video
- Interactive synchronous
- Interactive asynchronous
- Self paced research
- On line debate
- Workplace application
- Case study response
- Case study development
- Rotational roles
- Group problem resolution

ESC Funding – Group 2

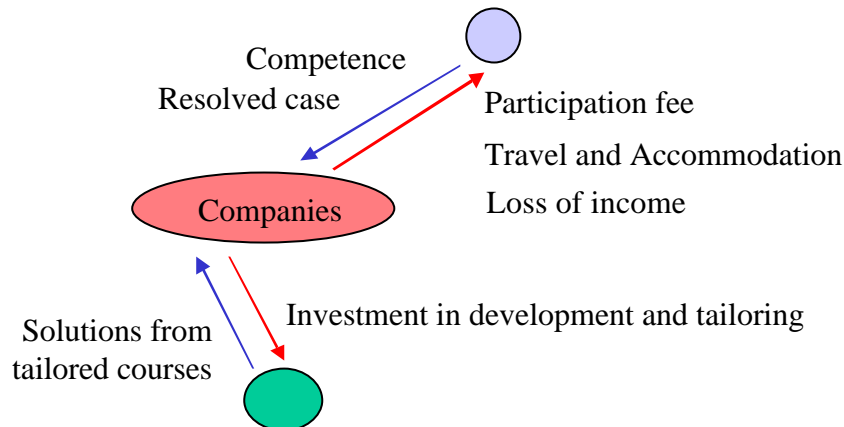
Funding Models



Funders



Cost/Value for Funding Company



Market needs - Group 3

- Where do the students come from: France (50%), Europe (10%), and rest of the world (40%)?
- Who will pay: Individual, companies
- What do they buy:
 - Diploma recognition by Government and Industry
 - New competencies:
 - Young students as trainees before employment.
 - Experienced managers from outside tested for competence through internship
 - Means to enhance existing competencies:
 - Send the practitioner for additional PM training
 - Modular lifelong training
 - Flexible, part-time learning process
 - Access to global experts and actual international experience
 - Recognition of prior learning
 - Being global requires appropriate technology support
 - Increased credibility towards the clients: graduated PM personnel
 - Easy access to supervisor
 - Relevance of the faculty to the industry specific needs
 - Training from a credible institution at the cutting edge of PM
 - Specific PM training adapted to specific industries?
 - Post graduate: emphasis on the faculty and on the networking
 - Masters degree: more emphasis on tools, and a broader view on techniques
- Emerging markets:
 - PM knowledge and competence recognition at reasonable costs (through grants?)
 - Links with “Western” Project oriented organisations (employment,)

- Integration of new technology and classic teaching - Internet University or Brick and Mortar University
- Modular design – based on applied research – Professional Degree
- Alignment with professional institutions – giving credit for PM certificates
- Customised corporate partnering – together with large / global companies
- Collaborative research with the industry
- Be on the list of Top 50 Business Schools / Project Management Schools
- Organise a competition among various business / PM schools to achieve visibility / credibility
- Define your market niche, i.e. largest, best, specialised on tools, marketing, operations, engineering, or other
- Positioning against PMP or other certifications – what is the value add of ESC
- What is the benefit of a double degree – compared to degree plus professional registration / certification
- What do corporations gain by hiring people from ESC as compared to certified PMs
- Spend marketing money for MBA programs for firms, doctorate program for individuals
- Consultancies need low cost trainees on running projects, which will then be retained as consultants or employed by the customer.

Need for entrance criteria - Group 4

- Maintain / ensure high quality program (reputation)
- Low attrition rate through rigorous screening
- Focus human social behaviour
- Right people do (study) right things

Masters Degree

- Undergraduate degree (any discipline)
- Ability to comprehend concepts, theory (present paper with application)
- Desire to advance own knowledge
- Ability to conduct independent work and in team
- Communication tools; oral, writing, presentation skills (interview)
- English language + 1 (native +1)
- Research skills (SOAP, Subjective, Objective, Analysis, Plan)
- Work experience, 5 years minimum
- Programme should provide training to do Real work (test with industry, relative to profession)
- References, professional 2, personal 2
- Computer skills (Office-tools and web)

Doctoral degree

- Research skills
- Desire to advance knowledge / competency
- Willing to share own knowledge (continuously and post graduate)
- Working experience = 5-10 years
- Interpersonal skills
- Cultural sensitivity
- Leadership skills (knowledge / demonstration)
- Strong opinions / support oral positions
- Plan for dissertation subject (focus)
- Bring value from own professional community, offer professional network to programme

- Must have character (honesty, trustworthy, role model)
- References, professional 3, personal 3
- Must have a real job

However:

1. Advice to align entrance criteria with partner university (Arlington, Washington, UTS).
2. Use entrance criteria to support the strategic desired position ESC has decided to take in the market place.
3. Marketplace defined as the competition with other educational institutions, preferred recruitment system for target industry and the desired strategic profile of the student-body.

Application on interactive web site:

- Interview candidates on shortlist
- Respond to prepared questionnaire
- Respond to assessor (person)

Agreements from OLCI July 2001

Management Committee:

Lynn Crawford, Bill Duncan, Jon-Erik Hogberg

Review Group:

Respective Content Team members.

Actions:

1. Content teams to report back according to agreed dates
(**Note:** Refer to Appendix A *GBoPMK Content Teams & Schedule 2002* for specific details regarding Content Team tasks and due by dates.)
2. Consultation on revised Business Case (Christophe Bredillet, Rodney Turner, Bill Duncan, Alicia Aitken)
3. Revised Business Plan to be distributed to OLCI list (Alicia Aitken)
4. OLCI Lille 2001 Pack to be finalised and saved to OLCI website (Nicolette Javorsek)

Location and timing of future workshops

In the evaluation and feedback from the OLCI 2001 Workshop, the following suggestions were made for future activities.

Participant preferences indicated the following as preferred locations for future workshops:

1. Beijing (8 votes) (IPMA China, University (Tsinghua) (Bill Duncan)
2. Vancouver (3 votes) (Brian Hobbs)
3. Sydney (3 votes) (Lynn Crawford)

Timing:

1. March

*Towards a Global Body of Project Management Knowledge
Lille, France 2001*

2. June – July
3. Oct - Nov

Possible hosts / sponsors (and responsibility to follow up):

Motorola
Phillips
Ericsson
VW

Appendix A: GBoPMK Content Teams & Schedule 2002

From Strategy to Project

Team Members: Rodney Turner, Khim-Teck Yeo, Sergey Bushuyev, Konstantin Zukov

Contact: Sergey Bushuyev

Timing:

Initial draft to Review Group: 30th May 2002

Review by Review Group: 30th June 2002

Amendments and Approval by Management Committee: 30th July 2002

Final documents (Lille 2001 Pack) emailed to Lille group and posted to website: 30th August 2002

Project Office

Team Members: Diana Papas, Lew Ireland, Lynn Crawford

Contact: Lew Ireland

Timing:

Initial draft to Review Group: 30th May 2002

Review by Review Group: 30th June 2002

Amendments and Approval by Management Committee: 30th July 2002

Final documents (Lille 2001 Pack) emailed to Lille group and posted to website: 30th August 2002

Steering Committees and Project Sponsors

Team Members: Gilles Caupin, Ralph Mueller, Jean-Louis Muller

Contact: Ralph Mueller

Timing:

Initial draft to Review Group: 30th May 2002

Review by Review Group: 30th June 2002

Amendments and Approval by Management Committee: 30th July 2002

Final documents (Lille 2001 Pack) emailed to Lille group and posted to website: 30th August 2002

Project Portfolio Management

Team Members: Inger Bergman, Donna Fitzgerald, Bruce Rodrigues

Contact: Inger Bergman

Timing:

Initial draft to Review Group: 30th May 2002

Review by Review Group: 30th June 2002

Amendments and Approval by Management Committee: 30th July 2002

Final documents (Lille 2001 Pack) emailed to Lille group and posted to website: 30th August 2002

Lessons Learned

Team Members: Brian Hobbs, Hal Mooz, Jon-Erik Hogberg, Jaap Van der Deijl

Contact: Brian Hobbs

Timing:

Initial draft to Review Group: 30th May 2002

Review by Review Group: 30th June 2002

Amendments and Approval by Management Committee: 30th July 2002

Final documents (Lille 2001 Pack) emailed to Lille group and posted to website: 30th August 2002