



Milkish Oaks Inc.
Portfolio, Program and Project Governance

W. R. Long, P. Eng., PMP
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MILKISH OAKS INC.



SelfGrowth
Your Professional Development Day!
Hosted By 
NEW BRUNSWICK CHAPTER



**PM Career Growth
= The Right Project + Flawless
Execution**



Themes....

Why

What

Value proposition

Competency evolution

PMI approach

Industry approach

“How To” guide

Competency model templates

Q & A



For clarity...

Flawless Execution is an expectation !!!

You are responsible for your career path

Your employer is only an “enabler”

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Why....

Project work in an operating company

Project success = Business benefits realized

Cultural change vs. Project execution

Change management & Project success

Corporate recognition

HR credibility

Career growth

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What....

Competence – ability to do a job properly

Competency – “set of defined behaviors that provide a structured guide enabling the identification, evaluation and development of the behaviours in individual employees”

Competency model – “a comprehensive, behaviorally based job description that both potential and current employees and their managers can use to measure performance & establish development plans”



Project Outputs

Actual Use of Requested Features Successful Endeavours



Value proposition... employers

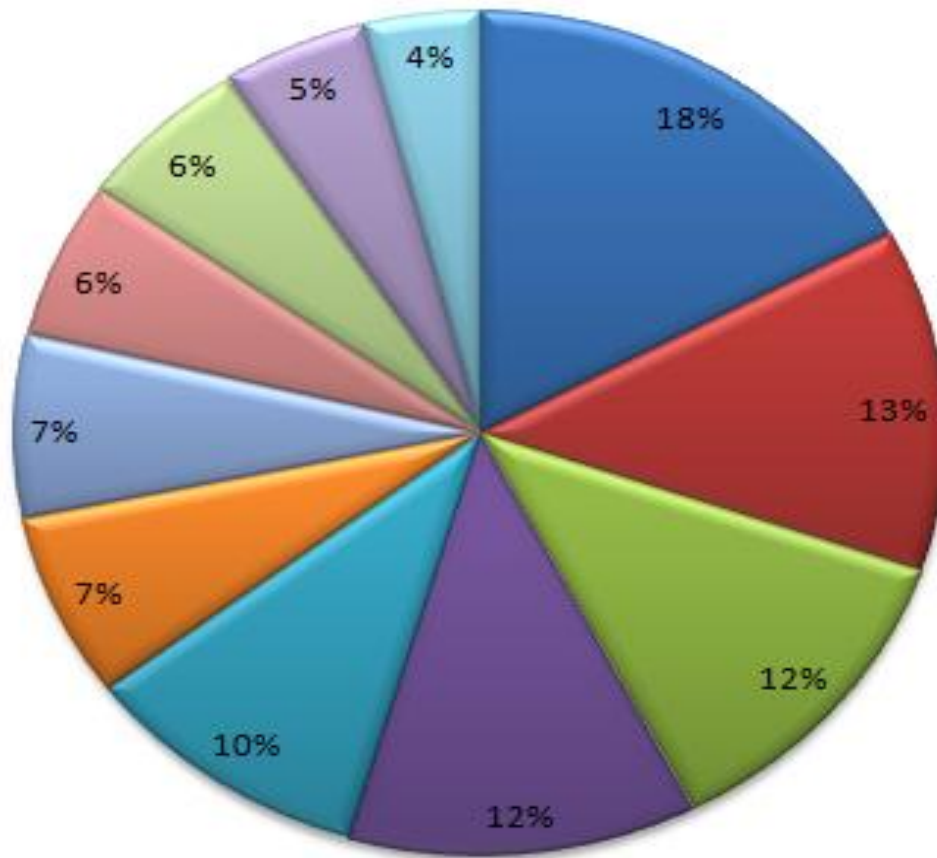
Aligns initiatives & competencies to business strategy and business results

Competency model deliverables

- **Selection**
- **Training & development**
- **Performance management**
- **Succession planning**
- **Career path**



Why Projects Fail



- Lack of executive support
- Incomplete requirements
- Expectations not set / managed
- Scope creep
- Project / Organization not aligned
- Lack of resources
- Technology Issues
- Other
- Lack of user involvement
- Poor Planning
- Inexperienced PPM People



Value Proposition... PM's

Aligns initiatives to business strategy

Aligns competencies to business strategy

Roadmap for success

Competency model deliverables

- **Performance management**
- **Succession planning**
- **Career development**



Evolution of Competencies & Competency models

- **1959 R. W. White – “..competence - a concept in performance motivation..”**
- **1970 Craig C. Lundberg – “Planning the Executive Development Programs”**
- **1973 David McClelland – “Testing for Competence Rather Than For Intelligence”**
- **1978 T.F. Gilbert – Human Competence, Engineering Worthy Performance**



Evolution...

- **1980 Dreyfus & Dreyfus – “A Five-Stage Model of the Mental Activities Involved in Direct Skill Acquisition.”**
- **1989 Audrey Collin – “Managers’ Competence: Rhetoric, Reality and Research”**
- **1994 M. Eraut – “Developing Professional Knowledge and Competence”**
- **2001 M. Mulder – “Competence Development – Some Background Thoughts”**



PMI approach to PM Competency development

1998 - “...to provide both individuals and organizations with guidance on how to access, plan, and manage the professional development of a project manager...”



Phase 1

Project Management Competency (PMC)

project team:

- **Established 1998**
- **Project Management Professional (PMP) Role Delineation Study – Fall, 2000**
- **Project Management Experience and Knowledge Self-Assessment Manual – Fall, 2000**



Phase 2

Project Manager Competency Development (PMCD) Framework Review:

- **Project team established 2000**
- **PMCD Framework “Exposure Draft” circulated / reviewed March – Dec. 2001**
- **1st Edition published 2002**



Phase 3

PMCD Framework, 2nd Edition:

- **Project team established mid-2004**
- **380 volunteers**
- **1st Draft released late 2005**
- **Decision to focus solely on PM competency 2006**
- **2nd Edition published 2007**



PMDC Framework:

- **Performance Competence** - what the project manager is able to do or accomplish by applying their project management knowledge (and skills).
- **Personal Competencies** - those behaviors, attitudes, and core personality characteristics that contribute to a person's ability to manage projects.



Performance Competencies:

- **1.0 Initiating a project**
- **2.0 Planning a project**
- **3.0 Executing a project**
- **4.0 Monitoring & controlling a project**
- **5.0 Closing a projects from stakeholders**

Note: Process Group / Knowledge Area mapping



Performance Competencies:

- **1.0 Unit of Competence : Initiating a Project**
 - **Element 1.1 Project aligned with organizational objectives and customer needs**

Performance criteria (demonstrates)

- **Understands the project alignment**
- **Achieves agreement on project alignment with project sponsor**



Performance Competencies:

- **1.0 Unit of Competence : Initiating a Project**
 - **Element 1.1 Project aligned with organizational objectives and customer needs**

Element types of evidence (outputs)

- **Description of the project alignment**
- **Documented sponsor agreement**



Personal Competencies:

- **6.0 Communicating**
- **7.0 Leading**
- **8.0 Managing**
- **9.0 Cognitive ability**
- **10.0 Effectiveness**
- **11.0 Professionalism**

Note: Process Group / Knowledge Area type mapping



Personal Competencies:

- **6.0 Unit of Competence: Communicating**
 - **Element 6.1 Actively listens, understands, and responds to stakeholders**

Performance criteria (demonstrates)

- **Actively listens**
- **Identifies explicit...project content...**



Personal Competencies:

- **6.0 Unit of Competence: Communicating**
 - **Element 6.1 Actively listens, understands, and responds to stakeholders**

Element types of evidence (outputs)

- **Survey results from stakeholders**
- **Documented observations from communications**



PMI PM Competency Development Cycle

Step 1 - Access performance

Step 2 – Complete development plan

Step 3 - Implement development plan

**Step 4 - Continuous assessment /
improvement loop**



Industry Approach

Step 1 - Assess corporate maturity for PM competency model

Step 2 - Assess corporate Change Management capacity

Step 3 - Design appropriate PM competency model , infra-structure and processes



Industry Approach

Step 4 – Align PM competency model with business processes

- HR job descriptions
- HR pay bands
- Performance management system

Step 5 – Implement, get stakeholder feedback & institute continuous improvement process



“How To” guide

- **Corporate culture**
- **Competency descriptors**
- **HR processes**
- **Performance management**
- **Institutionalize**



Corporate Culture – what’s important

Core competencies	Behavioral competencies	Management competencies	Initiative & creativity
Judgement	Cooperation & teamwork	Quality & quantity of work	Reliability
Commitment to safety	Support of diversity	Job knowledge / technical knowledge	Communication & customer service
Problem solving	Flexibility	Innovation	Organizational skills
QA / QC skills	Staff development	Responsiveness	Career growth /continuing education

Competency descriptors – job descriptions

- **General profile**
- **Accountability**
- **Decision making**
- **Complexity /problem solving**
- **Supervision required / exercised**
- **Communications /HR**
- **Education / Qualifications**



Competency descriptors – PM processes

- **Benefits mgmt.**
- **Quality mgmt.**
- **Scope & change mgmt.**
- **Document mgmt.**
- **Safety mgmt.**
- **Partnership mgmt.**
- **Change mgmt.**
- **Contracts mgmt.**
- **Transition mgmt.**



Competency descriptors – role characteristics

Direct reports

General scope

Responsibilities

- **PMO standards**
- **Project performance mgmt.**
- **Project tracking**
- **Issue mgmt.**
- **Project risk**
- **Financial mgmt.**



HR processes – classifications

Novice – rule based behaviour, strongly limited and inflexible

Experience beginner – incorporates aspects of the situation

Practitioner – acting consciously from long-term goals and plans



Knowledgeable practitioner – sees the situation as a whole and acts from personal conviction

Expert – has an intuitive understanding of the situation and zooms in on the central aspects



HR processes

PM compensation

- **Professional – Project Management
1,2,3..**
- **Pay bands**
- **Across business lines**
- **Professional accreditation built in**



Performance Management - processes

Selection

- **Job requirements**
- **Behavioral & skills interviewing**
- **Systematic interview / selection**

Training & development

- **Individual & group learning plans**
- **Gap analysis**
- **Development & remedial feedback / coaching**



Performance Management - processes

Succession planning

- **Method to assess candidate readiness**
- **Focuses training & development plans**
- **Critical knowledge, skills and experience transfer**



Documented Competency Model

Performance metrics

- **What's monitored, measured and rewarded**
- **On job behavior feedback**
- **Development goal setting**

Career paths

- **Clarity skills / experiences “follow on” jobs**
- **Benchmarks to progress upward**
- **Clarity on career progression**



PM Competency Matrix – Description

Professional – Project Manager	Novice	Practitioner	Expert
Levels	1	3	5
General Profile	Entry level professionals	Fully competent individuals	Recognized authority in field
Accountability	Provides specific services to support team	Provides consultative services in area	Recognized authority in field of expertise
Decision Making	Developing decision making skills	Uses own judgement for independent decisions	Decisions have significant impact on business
Complexity	Builds operating plan own department	Applies knowledge to moderate complex problems	Recognized resource for unique or complex business problems



PM Competency Matrix - Skills

Professional – Project Manager	Novice	Practitioner	Expert
Levels	1	3	5
PMO Standards	Responsible to apply standards	Makes and applies alternatives to Project standards	Makes and applies alternatives to Enterprise standards
Project Performance Management	Assists with specific activities	Uses objectives to determine if on track	Ensures reports are communicated to all shareholders
Project Tracking	Keeps track of assigned activities	Manages scope, cost and time to maintain progress	Creates and gets baselines approved, recommends re-scoping
Risk Management	Responsible to document and track	Responsible to identify project risks	Creates Enterprise risk mitigation plans



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Reference Credits:

Goggle Images

IOL - Competency Model

IOL - IDEA Process

PMI - PMBOK

PMI - Project Manager Competency
Development Framework, 2nd Edition

Wikipedia, the free encyclopedia



Thank you...



W. R. Long, P. Eng., PMP

(p) 506 333 6281

Email: wrlong@milkishoaks.ca

www.milkishoaks.ca

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