

Potential for project management representative bodies to extend their influence in helping solve global problems¹

By Alan Stretton

INTRODUCTION

In a recent article in this journal (Stretton 2021b), prompted by Pells' editorial "Project management needs a higher purpose" (Pells 2021), I discussed possibilities for "... extending the scope of project-related management to help address climate change and other global problems". However, I did not discuss what entities could or should be tasked with overseeing such extensions, and ensuing involvements.

In the concluding section of his editorial, Pells points out that "there is no organisation that represents the entire PM professional world", and that therefore a "top-down" "higher purpose" movement is not currently feasible.

Whilst this may be so, I believe that the mainstream project management (PM) representative bodies are in a position to play a prominent role in facilitating the involvement of a range of existing PM-related services in helping tackle global issues – if they should choose to extend their influence in this way.

I am using the descriptor "PM-related" to describe services which extend beyond the scope of conventional project management services – particularly towards the "front end" – which have been provided by certain project management service organisations for many decades, but which are seldom discussed in the publications of most PM representative bodies.

The main purpose of this article is to explore the potential of the latter to facilitate the involvement of PM-related services in tackling global problems, as well as the involvement of the more conventional PM services.

A BASIC FRAMEWORK LINKING GLOBAL ISSUES & PM-RELATED SERVICES

The basic framework used in this article, shown in Figure 1 below, is based on an embryonic framework first proposed in Stretton 2021b, which linked possible basic global-issue facilitating processes with various PM-related categories. I have amended some of the descriptors in each group, and have divided these into three project-related sectors, to facilitate discussions on possibilities for project management representative bodies to help solve global problems. I have labelled these sectors *Pre-project operations*, *Including project operations*, and *Post-project*.

¹ How to cite this paper: Stretton, A. (2021). Potential for project management representative bodies to extend their influence in helping solve global problems; *PM World Journal*, Volume X, Issue VI, June.

On the project management side, I have retitled the PM-related categories as “Relevant existing PM & extended PM-related services”.

Possible basic global-issue facilitating processes		Relevant existing PM & extended PM-related services
Pre-project ops.	<ul style="list-style-type: none"> ▪ <i>Decide on which important global issue(s) to address, and the desired objectives/results</i> 	<ul style="list-style-type: none"> ▪ Strategic initiation support (e.g. helping shape org. strategic objectives)
	<ul style="list-style-type: none"> ▪ <i>Decide what initiatives (incl. projects) will best help achieve those objectives, & specify their requirements</i> 	<ul style="list-style-type: none"> ▪ Strategy development support (e.g. FEL, CND) incl. project choices & requirements spec's.
Incl. project ops.	<ul style="list-style-type: none"> • <i>Define/develop the “front-end” phases of these global initiatives and their component projects</i> 	<ul style="list-style-type: none"> • Project definition (and execution/delivery) (e.g. Management of Projects [MOP], Agile)
	<ul style="list-style-type: none"> • <i>Execute and deliver the outputs of the projects and other strategic work</i> 	<ul style="list-style-type: none"> • Project execution/ delivery only
Post-p	<ul style="list-style-type: none"> ○ <i>Work with users of outputs to help them achieve the desired global results.</i> 	<ul style="list-style-type: none"> ○ Post-delivery services - Assist users in achieving their desired outcomes/ benefits

Figure 1: A basic discussion framework - Linking existing PM & extended PM-related services with possible basic global-issue facilitating processes

We will discuss each of the five sets of basic global-issue processes and relevant PM services in the descending order shown in Figure 1. Although the two processes in the “Pre-project operations” sector are the furthest removed from traditional project management services, there are some well-tried existing PM-related services which could be very relevant to the early global-issue processes, in certain contexts. These services, which include FEL (Front End Loading) and CND (Client Needs Determination), are covered to varying extents in the broader project management literature, but not in that of most PM representative bodies. Possibilities for the latter to adopt and/or advocate use of some of these services in the global-issue context will be discussed.

In the “Including project operations” sector, both the global-issue processes and relevant PM services share strong common attributes. The relevant project management services are strongly represented in the publications of most PM representative bodies, which are therefore well placed to help with global problems, as will be further discussed.

Finally, we will look at the bottom “Post-project” sector, which will be concerned with how PM representative bodies might be able to influence appropriate PM involvement in helping users of project and other outputs to help achieve desired results, in the context of global issues.

We now look at each of these three sectors in turn.

“PRE-PROJECT OPERATIONS” SECTOR

Possible global-issue facilitating processes	Relevant existing PM & PM-related services
<ul style="list-style-type: none"> Decide which important global issue(s) to address, and the desired objectives /results 	<ul style="list-style-type: none"> Strategic initiation support services (e.g. helping shape org. strategic objectives)
<ul style="list-style-type: none"> Decide what initiatives (incl. projects) will best help achieve those objectives, & specify their requirements 	<ul style="list-style-type: none"> Strategy development support services (e.g. FEL, CND) incl. initiative/project choices & requirements spec's.

This sector has two components. On the global-issue facilitating processes side, I have labelled them *Decide which global issue(s) to address*, and *Decide best (global) initiatives*. On the relevant PM-related services side, the corresponding strategic support services are substantial extensions from traditional project management services – as now discussed in more detail, mainly in the global issue context.

Strategic initiation support services > *Decide which global issues to address*

The first of the “Possible basic global-issue facilitating processes” is *Decide on which important global issue(s) to address, and the desired objectives /results*. This, of course, is an absolutely crucial decision, to which it is being suggested that PM-related *Strategic planning support services* could make a significant contribution.

With regard to relevant PM-related services, Stretton 2021b discussed how external *strategic planning support services* – which I am now describing as *strategic initiation support* – helped client organisations establish and/or shape their organisational strategic objectives. It exemplified two types of organisations which have provided such services. One of these was my old employer, Civil & Civic, which sometimes became involved in helping clients establish strategic business objectives. For example, I quoted from Clark 2002:93, where we helped an educational institution “come up with an integrated business plan for the school’s complete rebuilding and expansion ...”.

However, by far the more prominent of these types of organisations are EPC (Engineering, Procurement, Construction) firms. I quoted from Prieto 2009, who says that owners often need partners to help them translate their “programmatic vision and broad objectives into a well defined set of specific business objectives” (SBOs). Indeed, Prieto has written extensively about the latter, its importance, and how to go about it, most recently in Prieto 2021b in this journal, under the heading “Getting off on the right foot”.

There is one particularly good reason for believing that these types of skills can be appropriately applied in the global problems arena. This is because the SBO-related skills which Prieto writes about were mainly developed in the context of major complex projects, mega-projects, and what Prieto has called giga-projects. These major complex contextual conditions are also characteristic of the global problems arena. This, in turn, strongly suggests that the above type of partnering arrangements in helping establish the most appropriate organisational SBOs in such contexts would also be particularly appropriate to help in deciding which global problems to address. I cannot think of any other potential resource group which could even start competing in terms of appropriate know-how and experience.

I would also like to comment here on another recent article in this journal by Prieto entitled “Reversing global warming” (Prieto 2021a). In discussing this particular global issue, Prieto gives a detailed overview of system of systems challenges, their emergent nature and resultant outcomes, driving forces, possible feedback loops and hidden couplings, risks, and challenges for program managers. Although the context of his examination is global warming, I believe his analysis is applicable to other global issues as well, and that it is very relevant to the subject of deciding which important global issue(s) to address, and the desired objectives /results.

Returning now to relevant existing PM-related services, we have established that certain *Strategic initiation support services* have the potential to make a significant contribution to decisions on which global issues to address. The most prominent of these was helping partner organisations translate their “programmatic vision and broad objectives into a well defined set of specific business objectives” (SBOs).

Now, although relevant processes are discussed in parts of the mainstream project management literature, they do not appear in any publications by mainstream PM representative bodies.

Therefore, if the latter bodies are to extend their influence in helping decide on which global issue(s) to address, they will need to consider formally acknowledging and publicising the fact that many EPC firms have much experience in helping organisations translate visions into specific objectives, particularly in complex major project contexts, and are therefore unusually well equipped to help potential partners decide on which global issues they are best placed to address.

Strategy development support > Choose best initiatives to help resolve issues

I have not been party to deciding what initiatives will best help solve problems at a global level, but can probably safely assume that this process shares an attribute which is common to most non-trivial problems, which is the difficulty of determining what actions (initiatives) will be the most appropriate to help solve the problem.

In an organisational strategic management context, the framework I have been using for some time designates this type of work (after establishing the organisational strategic objectives) as *Stage 2: Develop strategic initiative options, evaluate, choose the best*. A key part of this type of problem-solving, as with all non-trivial problems, is the development of alternative approaches, and their evaluation, before deciding on the best approach.

At first glance it might not be thought that PM-related *strategy development support services* (labelled *strategic initiative management support* in Stretton 2021b) would have much to contribute to helping decide which global initiatives (including projects) would best achieve the desired global-issue objectives. However, as I have discussed at some length in past articles in this journal, most recently in Stretton 2021g, these PM support services have the potential to be particularly relevant in the global context.

My old employer, Civil & Civic developed a process we called Client Needs Determination (CND), which helped clients define or redefine their business needs and objectives, and the projects which would best help achieve those objectives.

More relevantly for global-scale issues, for well over half a century, many EPC firms have been delivering a range of strategic support services, including Front End Loading (FEL), which is specifically concerned with helping clients decide on the best choices of strategic initiatives to achieve their objectives. These FEL techniques were mainly developed in the context of large complex projects. Since global problems are invariably large and complex, PM-related organisations with FEL capabilities evidently have a uniquely appropriate set of skills and experience to bring to help solve global issues – probably better than those that could be provided by any other entity, at least as far as I can tell.

However, these types of PM-related extended support services, even the very prominent ones like FEL, are rarely acknowledged, or even mentioned, in the publications and other outputs of most mainstream PM representative bodies (except for the Major Projects Association).

Now, in light of the fact that FEL in particular is well represented in the wider project management literature, it would seem to be logical, and desirable, for PM representative bodies to actively embrace and endorse these “choosing the ‘right’ project” techniques, as I discussed in some detail in Stretton 2021g.

We can summarise the mainstream possibilities for PM representative bodies to extend their influence in helping facilitate these two early stages of global-issue processes as shown in Figure 2.

Possible global-issue facilitating processes	Potential for project management representative bodies to extend their influence in helping solve global problems?	Relevant existing PM & PM-related services
<ul style="list-style-type: none"> Decide on which important global issue(s) to address, and the desired objectives/results 	PM representative bodies could consider formally acknowledging and publicising the fact that many EPC firms have much experience in helping organisations translate visions into specific objectives, particularly in complex major project contexts. They are therefore well equipped to help potential partners decide on which global issues they are best placed to address.	<ul style="list-style-type: none"> Strategic initiation support services (e.g. helping shape organisation strategic objectives)
<ul style="list-style-type: none"> Decide what initiatives (including projects) will best help achieve those objectives, and specify their requirements 	PM representative bodies could/should formally acknowledge and publicise the fact that most EPC firms include FEL services, which help choose and specify the best projects to help achieve objectives, particularly in complex major project situations. They are therefore particularly well placed to help potential partners decide on which project-based initiatives will best contribute to achieving their global-issue objectives.	<ul style="list-style-type: none"> Strategy development support (e.g. FEL, CND) – incl. initiative/project choices, and requirements specifications..

Figure 2: Potential for PM rep. bodies to influence pre-project global problem processes

“INCLUDING PROJECT OPERATIONS” SECTOR

Essentially, the relevant existing PM services side of this sector covers the domain of the conventional discipline of project management. However, there are two different perceptions of the scope of PM, as noted by Morris 2017.

Project management as a generic discipline operates in at least two different ways. The most common is that of managing the post-sanction execution phases of a project; the other is the discipline for managing the whole project, from inception to operation. This broader, more holistic, more contextual view of the discipline is most developed as the approach known as ‘the management of projects’. [MOP]

Possible global-issue facilitating processes	Relevant existing PM & PM-related services
<ul style="list-style-type: none"> Define/develop the “front-end” phases of the global initiatives and their component projects 	<ul style="list-style-type: none"> Project definition (and execution/delivery) (e.g., Management of Projects [MOP], Agile)
<ul style="list-style-type: none"> Execute and deliver the outputs of the projects and other strategic work 	<ul style="list-style-type: none"> Project execution/delivery only

In the following discussions I have labelled the “most common” view with the rather more widely used descriptor, *Project execution/ delivery*, as shown on the left. I have described the other viewpoint – Morris’ MOP – as “*Project definition (and execution/ delivery)*”, as this appears to be a more appropriately descriptive label.

It is evident that both the global-issue processes and relevant PM services share strong common attributes, which are directly project-related, as now further discussed.

Project definition & execution/delivery > Define “front-end” initiatives/projects

I have included *Define/develop the “front-end” phases of the global initiatives and their component projects* in the possible global-issue facilitating processes, because its equivalent in mainstream project management publications is not always given the prominence its value-adding potential deserves – and I suspect this may also be correspondingly relevant to the global issues context.

On the PM services side, the Project definition phase of this service can be highly value-adding. As my old employer Civil & Civic recognised from the mid-1950s, and as have so many other project-based organisations, the potential for project management to add value in the “front-end” definition and development stages of a project is far greater than at any time later.

Although there is some variation between PM representative bodies, by and large “front-end” project definition/development is still under-represented as a project management responsibility in these bodies’ publications and publicity.

Now, in the context of PM representative bodies influencing the effective solution of global problems, (and indeed in other contexts as well), there appears to be substantial potential for these bodies to more strongly advocate for project management to be engaged in the “front-end” definition/development of projects, as well as their execution/delivery, to achieve greater value for the end users.

Such advocacy is particularly important, because non-project people and entities, including those in the global-issue arena, rarely have any knowledge that this aspect of project management exists, let alone that it has such substantial value-adding potential.

I would therefore recommend that PM representative bodies more strongly emphasise the value-adding potential of “front-end” project definition/development processes, and publicise this accordingly to potential sponsors and/ or users – and to possible global-issue partners.

Project execution/delivery services > *Execute/deliver (global) project outputs*

Here we have the most direct link between a global-issue process step and what is generally regarded as the most prominent of existing project management services – i.e. project execution/delivery.

The potential for PM representative bodies to help in this stage of global-issue processes is obvious to those potential external partners who are aware of the existence of these bodies, and of the project execution/delivery processes they advocate and promote. Perhaps such potential partners need only occasional prompting by PM representative bodies when it comes to considering partnering to help deal with global problems.

Relevant external parties who do not have the above knowledge and awareness would need to be lobbied by PM representative bodies, preferably on an individual basis, to convince them that project execution/delivery should not be left to amateurs, and that they should engage with appropriately accredited project management partners.

We now summarise the potential for PM representative bodies to extend their influence by contributing to the above two stages of global-issue processes.

Possible global-issue facilitating processes	Potential for project management representative bodies to extend their influence in helping solve global problems?	Relevant existing PM & PM-related services
<ul style="list-style-type: none"> Define/develop the “front-end” phases of the global initiatives and their component projects 	PM representative bodies could/should more strongly emphasise value-adding “front-end” project definition/development as a key part of PM functions, and publicise this accordingly to potential sponsors and/ or users – and particularly its value-adding attractiveness to possible global-issue partners.	<ul style="list-style-type: none"> Project definition (& delivery/execution) (e.g. Management of Projects [MOP], Agile)
<ul style="list-style-type: none"> Execute and deliver the outputs of the projects and other strategic work 	Potential global-issue partners who are not aware of PM and/or PM representative bodies should be identified, and persuaded to ensure that project delivery is undertaken by properly accredited PM teams	<ul style="list-style-type: none"> Project execution/delivery only

Figure 3: Potential for PM rep. bodies to influence direct project processes re global problems

We now move on to look at the last of the five global-issue facilitating processes

“POST-PROJECT” SECTOR

Post-project services > *Help users achieve (global) objectives*

Possible global-issue facilitating processes	Relevant existing PM & PM-related services
<ul style="list-style-type: none"> o <i>Work with users of outputs to help them achieve the desired global results.</i> 	<ul style="list-style-type: none"> o Post-delivery services Assist users in achieving their desired outcomes/benefits

Essentially this sector is concerned with possibilities for project management to assist what are likely to be many users in global-issue contexts to achieve their desired outcomes and benefits.

As noted in Stretton 2021b, there are some materials in the broader project management literature on project management involvement in achieving outcomes and realising benefits, but a good deal of these appear to apply only to rather special cases (although the latter is seldom acknowledged). This also applies to the few publications by PM representative bodies which mention such involvement.

By and large, as I discussed in Stretton 2020e & 2020i, project management is seldom in a position to be involved in post-delivery activities. The achievement of outcomes and realisation of benefits are usually in the hands of the users of the outputs from projects and other strategic work. They are rarely project management.

However, there may well be opportunities for project management involvement in helping achieve results with some types of global issues, perhaps in a similar way to certain types of development aid projects, or disaster recovery projects, which tend to have protracted durations. When feasible, on-going involvement by project management would then help provide continuity of purpose and action which might not otherwise be available – and would thereby bring substantial benefits. In such circumstances, corresponding advocacy by PM representative bodies would therefore appear to be appropriate.

Another factor pertinent to this sector (and indeed to the other sectors as well) is that global problems will usually involve a host of projects, programs, and portfolios of projects and programs. In the post-project sector, this suggests that project management could have an even broader ongoing role in providing continuity of purpose and action of multitudinous projects, over extended periods of time.

We can summarise this sector as follows.

Possible global-issue facilitating processes	Potential for project management representative bodies to extend their influence in helping solve global problems?	Relevant existing PM & PM-related services
<ul style="list-style-type: none"> o <i>Work with users of outputs to help them achieve desired results</i> 	PM representative bodies could recognise opportunities in global-issue situations where on-going involvement by PM would help provide continuity of purpose and action which might not otherwise be available, and advocate accordingly.	<ul style="list-style-type: none"> o Post-delivery services Assist users in achieving their planned outcomes/benefits

Figure 4: Potential for PM rep. bodies to influence post-delivery global problem processes

SUMMARY/DISCUSSION

This enquiry into the potential for project management representative bodies to extend their influence in helping solve global problems used an adaptation of a framework I proposed in Stretton 2021b, which linked a possible basic set of global-issue facilitating processes with groupings of existing project management (PM) and extended PM-related services.

Some of the more prominent findings from this enquiry are summarised in Figure 5 below, in the order of the proposed possible basic global-issue facilitating processes.

Possible basic global-issue facilitating processes		Potential for project management representative bodies to extend their influence in helping solve global problems?	Relevant existing PM & PM-related services
Pre-project operations	Decide on which important global issue(s) to address, and the desired objectives/ results	PM representative bodies could consider formally acknowledging and publicising the fact that many EPC firms have much experience in helping organisations translate visions into specific objectives, particularly in complex major project contexts. They are therefore well equipped to help potential partners decide on which global issues they are best placed to address.	Strategic initiation support services – (e.g. helping shape organisational strategic objectives)
	Decide what initiatives (incl. projects) will best help achieve those objectives, & specify requirements	PM representative bodies could/should formally acknowledge and publicise the fact that most EPC firms include FEL services, which help choose and specify the best projects to help achieve objectives, particularly in complex major project situations. They are therefore particularly well placed to help potential partners decide on which project-based initiatives will best contribute to achieving their global-issue objectives.	Strategy development support services (e.g. FEL, CND) incl. project choices & requirements spec's.
Incl. project operations	Define/develop the "front-end" phases of the global initiatives and their component projects	PM representative bodies could/should more strongly emphasise value-adding "front-end" project definition/development as a key part of PM functions, and publicise this accordingly to potential sponsors and/ or users – and particularly its value-adding attractiveness to possible global-issue partners.	Project definition (and execution/delivery) (e.g. Management of Projects [MOP], Agile)
	Execute and deliver the outputs of the projects and other strategic work	Potential global-issue partners who are not aware of PM and/or PM representative bodies should be identified, and persuaded to ensure that project delivery is undertaken by properly accredited PM teams	Project execution/ delivery only
Post-project	Work with users of outputs to help them achieve desired results.	PM representative bodies could recognise opportunities in global-issue situations where on-going involvement by PM would help provide continuity of purpose and action which might not otherwise be available, and advocate accordingly.	Post-delivery services Assist users in achieving their desired outcomes/ benefits

Figure 5: Summary of potential for PM rep. bodies to influence basic global problem processes

Regarding the "Pre-project operations" sector, we found that there were already existing PM-related services which appeared to be very relevant to the first two basic global-issue processes. Although they are covered to varying extents in the wider project management literature, these services are not covered in the mainstream PM representation bodies' literature. I have suggested that the latter should consider formally acknowledging and publicising the most prominent of these services, which are most notably offered by EPC organisations.

I am not sure of the extent to which the first of the PM-related services – *strategic initiation support* – would improve the process of deciding which global issue(s) to address, but it surely must have some potential benefit.

However, I have little doubt about the utility of the second such service, namely *strategy development support*. FEL services provided by EPC organisations are directly concerned with helping choose the right projects to achieve strategic objectives. Moreover, FEL services were developed and are mainly applied in the context of major complex situations, which would also be typical of global-issue problems. Therefore EPC firms with substantial FEL experience would appear to be uniquely well placed to help the equivalent process in the global-issue processes. Consequently I have recommended that PM representative bodies formally acknowledge and publicise these services.

When we come to the “Including project operations” sector, we have two well established groups of project management services to directly contribute to their corresponding global-issue processes. Regarding the “front-end” *project definition* group, I have suggested that PM representative bodies could/should more strongly emphasise this high value-adding phase as a key part of mainstream project management services, and publicise this, particularly to possible global-issue partners. With regard to *project execution/delivery* processes, perhaps the most relevant thing PM representative bodies can do it to identify and enlighten potential global partners who may not be aware of the benefits of using properly accredited project management teams.

Finally, in the “Post-project” sector, I have suggested that PM representative bodies could contribute by recognising opportunities in global-issue situations where on-going involvement by project management would help provide continuity of purpose and action which might not otherwise be available, and by advocating accordingly.

Concluding, this exploratory enquiry appears to indicate that the mainstream PM representative bodies are well placed to extend their influence in helping solve global problems, perhaps along the above lines – if they should choose to do so.

In the latter regard, I noted in Stretton 2021g that, in the first part of his “higher purpose” editorial, Pells 2021 discussed many outreach initiatives already being undertaken by PM representative bodies such as PMI, APM and IPMA. These include climate change policy, responses to the Covid-19 pandemic, negotiating crises, sustainable development goals, rebuilding the economy, and dealing with complex social change. In addition, there has been substantial encouragement and support for members of PM representative bodies to volunteer in helping “address problems, resolve issues and meet needs around the globe”.

These initiatives appear to indicate that many PM representative bodies have already been well motivated to take some early steps towards expanding the range and influence of their activities. With this background, they are therefore in a strong position to continue this journey by more formally embracing, extending and consolidating these, and further initiatives, to play substantially more prominent roles in helping solve global problems. Hopefully the notes in this article may help them in further pursuing such goals.

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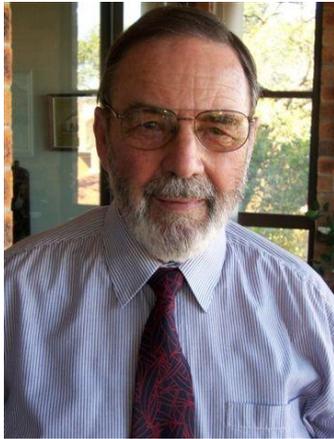
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