

Series on project-related contributions to organisational objectives

2. What's in a name? Portfolios, programs and projects in owner-organisations' strategic and operations management contexts¹

By Alan Stretton

INTRODUCTION

This is the second of a series of three articles on some particular aspects of what I have described as project-related contributions to organisational strategic management, and to the achievement of organisational strategic objectives.

The first article (Stretton 2022a) gave some background to this series, which I have linked with a shift in focus in the 7th edition of PMI's *Standard for Project Management and a Guide to the Project Management Body of Knowledge* (PMI 2021) from direct governance and management of projects etc., to an enhanced concern with their broader contribution to advancing organisational strategy and the achievement of business objectives – which has also been the focus of many of my articles in this journal in the past few years. I went on to link the organisational strategic management model which I have used in these articles with an abbreviated version of Figure 2-3 from PMI 2021, as shown in the lower section of the basic linked model represented in Figure 2-1 below. I am using this linked model as the reference point for the first two articles.



Figure 2-1: An abbreviated version of a linked basic organisational strategic management model

The first article of the series was concerned with some long-existing project-related supplier organisation services to owner organisations in the context of this linked basic strategic and operations management model of the latter. It particularly focused on their contribution to the first two stages, which gets little coverage in the mainstream project management literature.

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This second article will switch to internal arrangements within the owner organisation, and the contributions of portfolio, programs and projects to the context of this linked model. In particular, it will focus on the variety of different meaning which are given to each of these three descriptors in the project management world, and discuss how they might be best described to adequately indicate the nature of their particular contribution.

We start by expanding Figure 2-1 to show various possible combinations of portfolios, programs and projects in the context of the organisational strategic management model.

ADDING PORTFOLIO, PROGRAM & PROJECT COMBINATIONS FROM PMI 2021

It can be seen in Figure 2-1 above that the contribution from PMI's *Figure 2-3* comprises only the broad headings *Portfolios*, and *Programs and projects*. However, PMI's *Figure 2-1. Example of a system for value delivery*, has presented a variety of combinations of these three, which I have substituted for the broader headings, as shown in Figure 2-2.

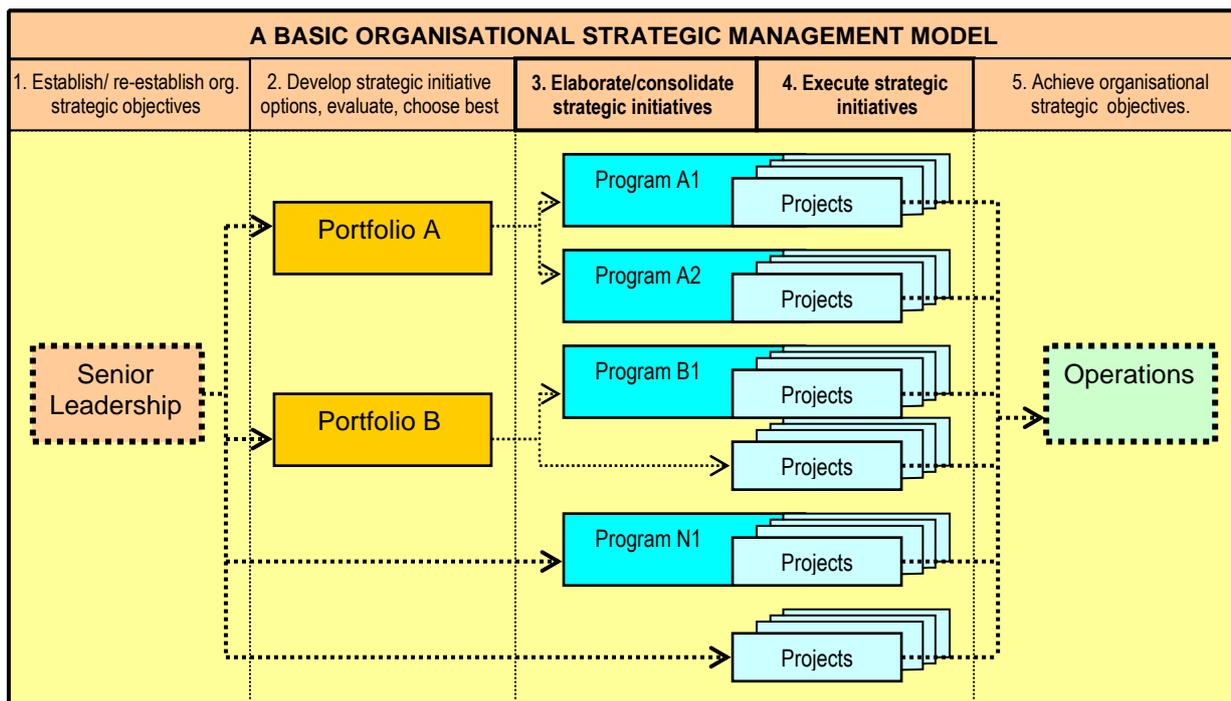


Figure 2-2: Substituting combinations of portfolios/ programs/projects based on PMI's Figure 2-1 for the basic headings in the lower section of Figure 2-1 above

In relation to its Figure 2-1, PMI 2021:8 says,

Figure 2-1 shows an example of a system to deliver value that has two portfolios comprised of programs and projects. It also shows a stand-alone program with projects and stand-alone projects not associated with portfolios or programs.

It can be seen that portfolios are not included in some organisational strategic management processes, as will be further discussed later.

DIVERSE PERCEPTIONS OF PORTFOLIOS, PROGRAMS AND PROJECTS

I recently discussed project portfolio and program management terminologies in Stretton 2021j in this journal, and have discussed different understandings of the nature and scope of projects and project management in earlier articles – e.g. Stretton 2016g.

Very recently Buttrick's 2021 article on *Portfolios, programmes and projects in context* has prompted me to review and add to some of my earlier articles, here in the context of the above organisational strategic management framework. As Buttrick says,

The use of the terms 'project', 'programme' and 'portfolio' varies from organization to organization and even within organizations.

Many other authors have made similar comments over the years, some of which will appear below in relation to individual terms.

Buttrick's paper offers his own definitions for business portfolios, programs and projects, and notes that

The terms used in this paper are consistent with those in the ISO 21500 series standards, some professional bodies of knowledge and published methodologies, such as those by AXELOS. The definitions in this paper are more flexible and the more limited definition used in some organisations can be subsumed within them.

Whilst I like having inclusive-type definitions, they do not help a great deal when it comes to understanding what an individual has in mind when he or she starts discussing any of these three terms. We very often need more "limited definitions" in such cases, to help avoid misunderstandings, or worse.

The following will discuss portfolios, programs and project in turn, and propose "limited definitions" to help signal and clarify their place in the context of their contribution to organisational strategic and operation management processes.

DIVERSE PERSPECTIVES OF THE NATURE AND ROLES OF PORTFOLIOS

Different definitions/descriptors of portfolios, and portfolio management

....the term portfolio management can mean different things to different people, ...
(Dalcher 2020)

Aritua et al 2008 described terminological differences in the portfolio domain as follows.

Like programmes, portfolios do not have a uniform homogeneous definition. The term 'portfolio' has been in use for some time and is used across different sectors and throughout many and diverse organisations. It therefore has a multiplicity of meanings.

In the context of these articles, which are specifically concerned with organisational strategic management, there appear to be three broad categories of definitions

Portfolio definitions not associated with organisational strategic management

Following are two examples from Stretton 2021j of portfolio definitions which do not include any mention of organisational strategic management.

...I define a portfolio as a group of projects that share common resources. Projects in a portfolio share common inputs. (Turner 2016)

A project portfolio is a collection of projects to be managed concurrently under a single management umbrella where each project may be related or independent of the others. (Martinsuo & Dietrich 2002; Thiry 2004)

Portfolio definitions which include links to achieving strategic objectives

The following are examples of definitions/descriptors of portfolios which also include links to achieving strategic objectives.

Portfolio: Projects, programs, subsidiary portfolios, and operations managed as a group to achieve strategic objectives. (PMI 2021:244)

A portfolio is a collection of projects or programmes and other work that are grouped together to facilitate effective management of that work to meet strategic business objectives. (PMI 2013c) [Turner 2016]

Portfolio defined as intimately involved in strategic management processes

The following definition of portfolio management by Fraser 2020 presents it as is an integral component of organisational strategic management processes:

Portfolio management is the centralized management of one or more portfolios, which includes the enabling, identifying, balancing, measuring, adjusting and reviewing/renewing of programs of work, projects and other work to achieve specific business objectives.

More recently, Buttrick 2021 defined portfolios somewhat similarly, under a sub-heading of *Definitions for business portfolios, programmes and projects* (my underlining).

A **portfolio** comprises current benefit generating business activities, together with a loosely coupled but tightly aligned portfolio of programmes, projects and other related

work, aimed at realising the benefits of part of a business plan or strategy. A portfolio comprises all or a part of an organisation's investment required to achieve its objectives and are closely aligned, or even coincident with, an organisation's business plan.

I also note here that, in Stretton 2021j, I quoted the following descriptor of portfolio from Fraser 2020, which aligns very directly with the work defined in Stage 2 of the basic organisational strategic management model.

A portfolio is where priorities are identified, investment decisions made, capacity is analysed, and resources ... are allocated.

More specific descriptor of Stage 2 strategic management-related portfolios?

It seems to me that using the bare descriptor *portfolios* in the context just described, which is so directly related to Stage 2 of the organisational strategic management model, is problematic. On the one hand (as far as I can tell) this appears to be its most commonly discussed context in the project management literature, particularly more recently. On the other hand, it effectively denies (or ignores) the legitimacy of other usages of the *portfolio* descriptor. In my view, the latter is an unrealistic (or even somewhat arrogant?) position to take, because other usages are a fact of life, and cannot be denied. It appears to me to be much more realistic and practical to particularise this Stage 2-related type of portfolio with a more specific descriptor. I have chosen to use the descriptor *strategic investment portfolio*, as now discussed.

Stage 2-related portfolios described as strategic investment portfolios

Buttrick's above definition of a portfolio specifically identifies its investment components, in the context of its organisation's business plan or strategy. The following descriptor of portfolio from Fraser 2020 is very similar.

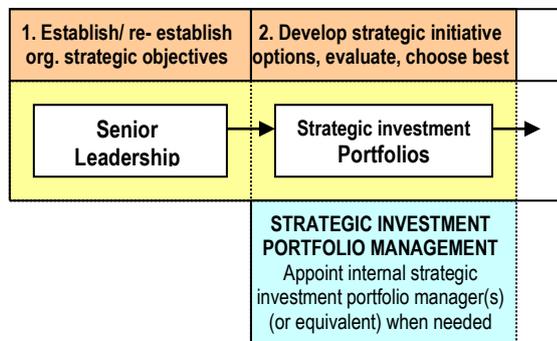
A portfolio should reflect the total or parts of investment planned or made by an organisation. These should be aligned with the organisation's strategic goals via its business objectives.

These appear to support my contention that the descriptor *strategic investment portfolio* accurately describes the type of Stage 2-related portfolio we are concerned with here.

Formal strategic investment portfolio managers, or de facto, or ???

As indicated earlier, in some types of organisations and/or situations, formal strategic investment portfolios may not be required. In such cases, some sort of de facto arrangement may be made if deemed desirable, or needed. If no such appointments or arrangements are made, there is a real danger that the operations in Stage 2 may suffer from lack of someone with specific accountability, and/or from lack of specific direction or coordination when different disciplines or departments are involved. Therefore, top management ("senior leadership") will need to ensure the timely

appointment of someone with broadly equivalent responsibilities to a strategic investment portfolio manager in leading Stage 2 processes.



Concluding this section on portfolios in the organisational strategic management context, Figure 2-3 adds the strategic investment descriptor to Stage 2-related portfolios to the first two stages of Figure 2-1, and appends a text box to illustrate the appointment of strategic investment portfolio managers (or their equivalent) when needed.

Fig. 2-3: Adding 'strategic investment' portfolios

DIVERSE PERSPECTIVES ON THE NATURE AND ROLES OF PROGRAMS

A variety of definitions of programs and program management

....one person's programme can be easily interpreted as the next person's portfolio, megaproject, gigaproject, major project, complex project, change initiative, or simply, project.
 (Dalcher 2021)

A decade ago I listed 36 definitions of programs and program management as an appendix to Stretton 2012c. Looking at them again, they can be grouped in roughly equal numbers into the four broad categories, under two main headings.

- Program definitions do not mention business or strategic objectives
 - Primary focus of definitions is on coordinating component projects
 - Definitions add synergistic-type benefits from such coordination
- Program definitions include contributing to business or strategic objectives
 - Definitions linked to business objectives/benefits
 - Definitions specifically linked to strategic objectives or similar

Program definitions do not mention business or strategic objectives

- Primary focus of definitions is on coordinating component projects – two examples

Programs are defined as long-term undertakings that include two or more projects that require close coordination
 (Archibald 2004)

A program is defined as an undertaking in which a group of projects for achieving a program mission are organically combined.
 (P2M 2008)

○ Definitions add synergistic-type benefits from such coordination – two examples

A programme is a group of projects which are managed in a coordinated way, to deliver benefits that would not be possible were the projects managed independently.
(Turner 1993)

Program: Related projects, subsidiary programs, and program activities that are managed in a coordinated manner to obtain benefits not available from managing them individually.
(PMI 2021:4)

Program definitions include contributing to business/ strategic objectives

○ Definitions linked to business objectives/benefits – two examples

Program management is a way of coordinating projects that have a shared business aim.
(Thiry 2004, quoted by Jamieson & Morris 2004)

Program management is now strongly seen as the management of multiple projects connected to a shared business objective
(Morris & Pinto 2004)

○ Definitions specifically linked to strategic objectives or similar – three examples

Programme management is the co-ordinated management of related projects, which may include business-as-usual activities that together achieve a beneficial change of a strategic nature for an organization.
(APM 2006)

In MSP [“Managing Successful Programmes”], a programme is defined as a temporary, flexible organisation created to coordinate, direct and oversee the implementation of a set of related projects and activities in order to deliver outcomes and benefits related to the organisation’s strategic objectives.
(OGC 2007:4)

A programme is a tightly coupled and tightly aligned grouping of projects and other related work managed as a temporary, flexible organisation created to coordinate, direct, oversee and deliver outputs, outcomes and benefits related to a set of strategic objectives.
(Buttrick 2021)

Overall, this is quite a wide variety of example definitions, which I have tried to present in an order of increasing amounts of detail from the first group to the fourth. However, there is a more specialised type of program management which does not emerge from the definitions, but is discussed in very substantial detail in the OGC 2007 publication “Managing Successful Programmes”. I am now going to draw on this in discussing OGC’s more specialist understanding and application of its type of program management in the context of the organisational strategic management model.

More specialised “front-end”-initiated programs – strategic initiative programs

The OGC 2007 Figure 1.2 indicates that their types of programs are initiated, and program managers appointed, directly after the organisational strategies, policies,

initiatives and targets have been established. This is not necessarily the case with programs at large, which may be, and very often are, initiated later, as the chosen strategic initiatives are being developed, and/or decisions made about how they will be executed.

However, the OGC-type “front-end” initiation of programs has been in place for quite some time in the procurement and acquisition processes of public sector organisations in the UK. I have been told that these types of “front-end” programs have been in place for even longer in some government agencies in the USA, notably in defense, energy and transportation. And no doubt there are other examples of these somewhat more specialized “front-end”-initiated programs.

In light of the great variety of types of programs indicated above, and other factors, I had been undecided about including the OGC-type program as a specialist type. However, I have chosen to include it for two reasons. One is the prominence of “Managing Successful Programmes”, which is a virtual standard. The second is that this type of program corresponds closely with my recommended appointment of strategic initiative managers in Stretton 2020d (which I subsequently linked directly with the OGC-type programs in Stretton 2020f and 2020h).

For these reasons I have elected to describe these more specialist types of programs as *strategic initiative programs*, to definitively distinguish them from the many other more generalised types.

Adding strategic initiative program management to Figure 2-3

In Figure 2-4 below I have provided for the appointment of strategic initiative program managers in a narrow area straddling the end of Stage 2 and the beginning of Stage 3. I have also indicated that their responsibilities extend to at least the end of Stage 4 – as indeed do those of strategic investment portfolio managers, as indicated. I will have more to say about their responsibilities in Stage 5 in the third article of this series.

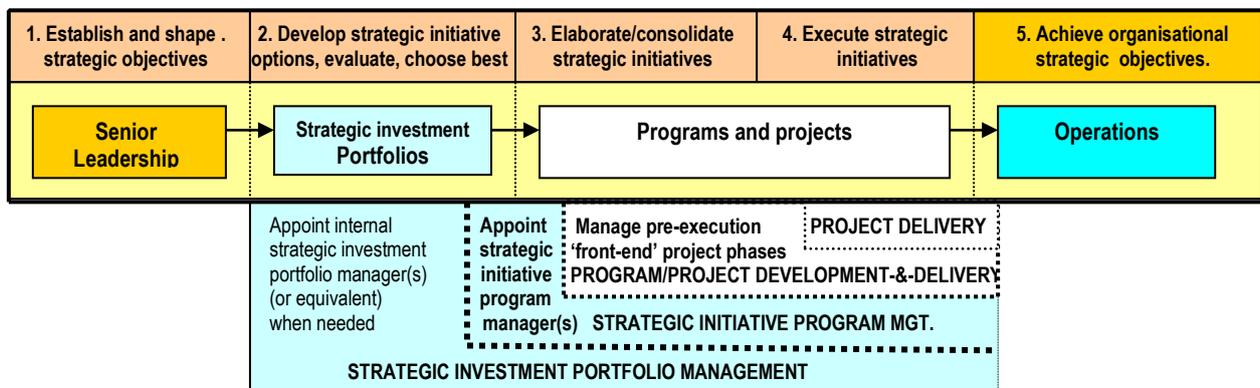


Figure 2-4: Adding strategic initiative program management to internal owner organisation roles

In Figure 2-4 I have added two forms of project management involvement in Stages 3 and 4. One is marked *Project Delivery*, which is shorthand for Project execution-and-delivery, and the other *Program/Project Development-and-Delivery*. This leads us into the third major topic of this article.

DIVERSE PERSPECTIVES ABOUT PROJECT MANAGEMENT INVOLVEMENT IN PROJECT DEVELOPMENT PHASES

As just noted in relation to Stages 3 and 4, Figure 2-4 specifically distinguished between the project management of *pre-execution 'front-end' project phases plus execution/ delivery* on the one hand, and *project execution-delivery only* (marked "Project delivery" in Figure 2-4), on the other. I have done this simply because, as with portfolios and programs, project management means different things to different people. Morris 2013:235 put it this way.

Project Management is either the generic term for the knowledge domain or for the discipline of managing the development and delivery of projects. In practice, in many organisations, the term is also used to refer only to the management of project execution (after requirements have been identified). If this is the case, then we need to ask, what is the discipline that is responsible for managing the front-end stage of the [project] life-cycle – development management? (To me, it would seem best to extend project management to include this activity).

We now look at these two co-existing perspectives in a little more detail.

Project management is widely seen as an execution/delivery-only discipline

Many people, particularly outside the discipline, but also within it, still regard project management as being confined to project execution/delivery. As Dalcher 2016 put it,

The traditional definition of a project implies a temporal arrangement concerned with actualising a planned and defined objective. Indeed, project management is regarded as an execution discipline concerned with realising plans. In the UK, especially in government circles, there is currently a growing emphasis on strengthening the profession of *project delivery*, implying that project management as practiced is an implementation-focused approach.

Indeed, project execution/delivery-only forms of project management are very widely practiced, and some of these, such as major infrastructure and similar public capital projects, are not only highly visible to the general public, but also typically involve very large expenditures. So, it is hardly surprising that the general public largely views projects with delivery-only spectacles.

Up to recently, execution/delivery has also been the main focus of most project management "standards" and similar guidelines. However, as indicated in the first article, PMI 2021 has shifted its focus to a wider canvas, which includes a shift from a

focus on governing projects etc., to a concern with their broader contribution to advancing organisational strategy and the achievement of business objectives.

Development-&-delivery project management has greater potential to add value

...value is created in the front-end: "that's when you think about what you want to do, you review the options, you work out how you'll procure it, you finalise the design"
(Morris 2013:186, quoting Sir David Higgins)

Some types of projects in some application areas are managed in the development-&-delivery mode as a matter of course. However, there are very many cases where this mode is not utilised, but which would benefit from direct project management of the development phases, as outlined by Dalcher 2016.

Delivery reduces project management to a lower common denominator focused on implementation of pre-defined results. Crucially, it ignores the potential influence of project managers and leaders in shaping, advocating, negotiating, motivating and enhancing potential solutions.

Morris 2013:283 puts the potential for adding value by effectively managing the front-end very directly, as follows.

The front end is the most important part of the project offering the greatest opportunities to add, or destroy, value.

On a personal note, the things that stimulated my ongoing interest in project management after I joined Civil & Civic/ Lend Lease were not the execution/delivery part, but the abundant value-adding potential and actualities achieved as we progressively added the project management of the project design phases to execution/delivery. There was even more stimulation as we then moved further back into first helping many clients determine or clarify their real business needs, and subsequent developments.

My interest in project management has therefore been primarily with extended versions of its scope, and this in the context of the utility of these versions to the strategic and operational management of the relevant organisations, mainly viewed from the perspective of a project-related supplier organisation.

A note on these descriptors

In this section I have adopted the descriptor "develop-&-deliver" project management for this particular perspective of the nature of projects – which coincides with the description used by Morris 2013:235 in the quotation at the beginning of this major section.

However, it should also be noted that, for well over a quarter of a century, Peter Morris used the terminology *The Management of Projects* ("mop") to cover "management's

role in overseeing the shaping of project and program goals and strategies and the development of the project definition in its front end” (Morris 2013:283).

As far as I know, this descriptor was not widely adopted – perhaps because it does not directly suggest just what it was that “mop” actually embraced. This is the main reason I have chosen the more pedestrian, but directly descriptive terminology, “develop-&-deliver” project management.

Discussions in this domain can be further complicated by the fact that project management may only manage part of the project development phases in some circumstances, but we do not appear to have succinctly descriptive terminologies to cover this situation. I have discussed this situation in some of my earlier articles – but the only term I can offer for describing this is “partial project development management”, which does not adequately cover this quite complicated situation, particularly with regard to divided development management responsibilities between project and strategic planning staff. This is another practical situation that is given little attention in the project management literature. However, divided responsibilities in project development has been a problem in the past, and is probably still relevant today.

However, even with undivided responsibility by project management in the *project development-&-delivery* mode, or its related operations in the *project delivery* mode, we still have these different perceptions as to which properly represents project management, and need to be cautious in ensuring that we are on the same page when discussing it with others.

SUMMARY/DISCUSSION ON THIS ARTICLE

What's in a name?

“When I use a word”, Humpty Dumpty said, in rather a scornful tone, “it means just what I choose it to mean – neither more nor less”.

(Lewis Carroll, Through the Looking Glass, 1871)

Dalcher 2016 quotes the above in an article in this journal which begins with the question, “Is it time to revisit our definitions of projects and programmes?” He adds,

The Humpty Dumpty theory of semantics holds sway in most societies and many organisations and cultures. Words, symbols and concepts are endowed with additional meaning or associations, often derived from highly contextual, regional or vernacular sources, which can make a word mean precisely what the user wants it to mean

Dalcher's article introduces an accompanying article by Thiry 2016 on new developments in program management. Neither writer offers new definitions of projects or programs, but they do discuss more recent changes in emphasis about each.

An example is Dalcher's above observation about a growing emphasis on strengthening the profession of *project delivery* in some circles in the UK. This was included in the above discussions on two different understandings of the project management role – i.e. management of project delivery vs. management of project development-&-delivery.

Another example of changes in emphasis is the following observation by Thiry 2016 about program management.

As a discipline it has reached a point where, today, the main program management standars and writers agree that it is meant to deal with complex and turbulent situations and to deliver benefits, not products.

My observation is that this understanding may be current in some domains, but would not be endorsed by many practitioners and others who define programs and their management quite differently, along the lines of the many exemplified defintions quoted earlier in this article.

My main concern in this article is that some people, in effect, appropriate their own particular meanings to portfolios, programs or projects, ignoring the reality that these entities have different meanings to different people and/or in different contexts. This is exacerbated by the fact that all three entities are also common usage words outside the project management environment, which can further muddy the waters when attempting to communicate with non-project people.

I have no silver bullet solution to these problems. In this article I have simply proposed the addition of adjectival descriptors to more precisely indicate the roles of each in the context of their contributions to organisational strategic and operations management.

As a final comment, the above discussions on different understandings of various terminologies could also be seen as a subset of a yet wider issue recently discussed by Pirozzi 2021, in his article in this journal on *The everlasting importance of a common project management language*. We still appear to have a rather long way to go to reach this highly desirable goal.

SUMMARY/DISCUSSION ON SERIES TO DATE

The first article of the series was concerned with some long-existing project-related supplier organisation services to owner organisations in the context of this linked basic strategic and operations management model of the latter. It particularly focused on their contribution to the first two stages, which gets little coverage in the mainstream project management literature.

This second article has been concerned with internal arrangements within the owner organisation, and the contributions of portfolio, programs and projects to the context of this linked model. In particular, it has focused on a variety of different meaning which are given to each of these three descriptors in the project management world, and

discussed how they might be best described to adequately indicate how they contribute in the above context.

The common thread of these two articles has been the relevance of both the external and internal contributions discussed to various stages of a basic organisational strategic management model. We can combine the figures which illustrate these two quite different types of contributions into the one figure, as shown in Figure 2-5.

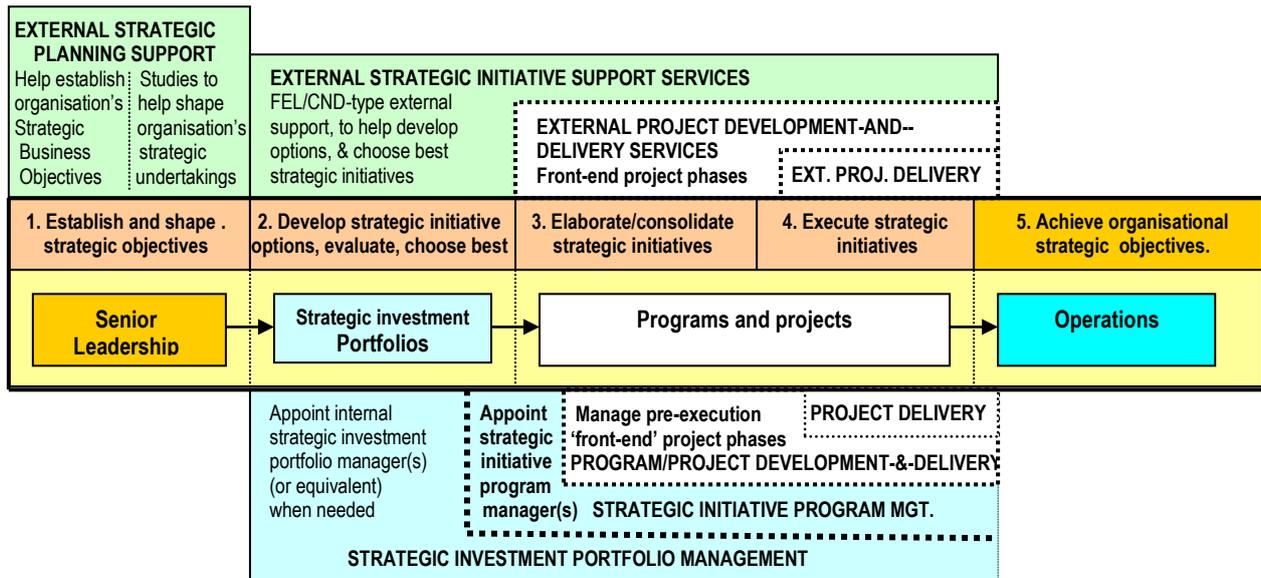


Figure 2-5: Combining external project-related service to internal owner organisation roles

I have slightly modified the external project-related services material from Figure 1-6 in the first article to match the format of the lower section in Figure 2-4 – but the above is essentially the same as the original. In short, the above combined figure essentially summarises the headings of the main topics discussed in these first two articles.

Finally, it is noted that these contributions only go up to the end of Stage 4 (with a slight overlap into Stage 5 to suggest handover of outputs, or equivalent). The third and final article of this series will be looking in some detail at Stage 5, and at project management involvement (or lack thereof) in helping users convert project outputs to organisational outcomes and benefits.

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About the Author



Alan Stretton, PhD

Faculty Corps, University of Management
and Technology, Arlington, VA (USA)

Life Fellow, AIPM (Australia)



Alan Stretton is one of the pioneers of modern project management. He is currently a member of the Faculty Corps for the University of Management & Technology (UMT), USA. In 2006 he retired from a position as Adjunct Professor of Project Management in the Faculty of Design, Architecture and Building at the University of Technology, Sydney (UTS), Australia, which he joined in 1988 to develop and deliver a Master of Project Management program. Prior to joining UTS, Mr. Stretton worked in the building and construction industries in Australia, New Zealand and the USA for some 38 years, which included the project management of construction, R&D, introduction of information and control systems, internal management education programs and organizational change projects. He has degrees in Civil Engineering (BE, Tasmania) and Mathematics (MA, Oxford), and an honorary PhD in strategy, programme and project management (ESC, Lille, France). Alan was Chairman of the Standards (PMBOK) Committee of the Project Management Institute (PMI®) from late 1989 to early 1992. He held a similar position with the Australian Institute of Project Management (AIPM), and was elected a Life Fellow of AIPM in 1996. He was a member of the Core Working Group in the development of the Australian National Competency Standards for Project Management. He has published over 230 professional articles and papers. Alan can be contacted at alanailene@bigpond.com.au.

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