# PMPP 201 Unit 2: Integration Knowledge Area

## Overview

Welcome to Unit 2 of PMPP 201. In this Unit, we begin our weekly dive into one of the 10 “Project Management Knowledge Areas,” as listed in the Project Management Institutes Body of Knowledge (PMBOK). As noted in PMPP 201 Unit 1, the PMBOK is at the core of our curriculum and Learning Outcomes.

This unit will consider the knowledge area of Integration.

Every organization that takes the steps to perform project work can only do so by integrating it into their organizational structure and culture. Project success depends on the proper assimilation of PM concepts and processes (AND how these fit into the values and mission of the organization). A project manager must understand their leadership role and its effect on project work.

We target our assignments to prepare you for use in real-world project management. You will commonly perform work based on a given scenario or use samples/templates from the web. Plus, each week, you’ll be submitting a Weekly Recap Status Report that discusses lessons learned.

## Topics

This unit is divided into the following topics:

1. The Project Charter
   1. You will develop and write a *project charter*, considering the business case, enterprise environmental factors, risks, and other factors. The charter is the ‘Executive Summary’ of the project.
2. The Time Value of Money
   1. Most projects have financial impact of some sort. Many can have HUGE amounts of monetary resources assigned to them. You will consider the two primary calculations used to predict the value (of the project results) in the future. The two calculations can also be used during the project selection process to determine which project is the better financial choice.
3. Monitoring and Controlling a Project
   1. Throughout project work, including the *planning phases*, it is critical to have systems established to monitor progress, THEN be able to make decisions accordingly. During the *monitoring and controlling* activities, data gets gathered, it is formulated into a reporting system of some sort, and it is communicated to the appropriate *stakeholders*… who, in turn, make decisions/adjustments about the project.
4. Change Management Systems
   1. The adjustments mentioned above, the controlling portion of monitoring and controlling, will be necessary at various times. A proper ‘Change Management System’ will permit all changes, regardless of their source, to be documented and considered by the appropriate stakeholders.

## Learning Outcomes

When you have completed this unit, you should be able to:

* Draft a charter (executive summary), including a Scope Statement, a basic budget, and a (high level) Work Breakdown Structure (WBS, a list of tasks).
* Calculate Future Value (FV) and Present Value (PV) and be able to use these calculations to help decide the ‘business case’ for a project
* Select charts and build a monitoring ‘Dashboard’.
* Create a basic ‘Change Control Request Form’.

## Activity Checklist

Below is a checklist of learning activities you will benefit from in completing this unit. You may find it useful for planning your work.

It is important to complete ALL Personal Activity PRIOR to FAR Centre sessions.

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| 🗹 | **Activities** | **Expected Time Commitment** |
|  | **Personal Activity 2.0.1**: Watch Instructor Video (PowerPoint file included for later reference). | 30 minutes |
|  | **Personal Activity 2.0.2:** Read Fundamentals of PM (FPM), Chapter 3. | 50 minutes |
|  | **Personal Activity 2.0.3:** Read All In One (AIO), Chapter 4. | 60 minutes |
|  | **Personal Activity 2.0.4:** Watch AIO Video “Working with Project Integration Management” by Phillips. | 18 minutes |
|  | **Personal Activity 2.0.5:** Watch AIO Video “Time Value of Money” by Phillips. | 7 minutes |
|  | **FAR Centre Activity 2.1.1:** Form teams of 3 to 5, select from a list of ‘Charter Exercise Project Needs’ (provided scenarios) and draft a Charter Statement, Scope Statement, (basic) Budget, and a (high level) WBS for that need. Use AIO pages 136 & 137, plus web samples if needed. | 30 minutes |
|  | **FAR Centre Activity 2.1.2:** Share your results with the class. | 10 minutes |
|  | **FAR Centre Activity 2.2.1:** Return to your teams and calculate the FV’s and PV’s on the provided worksheet. | 10 minutes |
|  | **FAR Centre Activity 2.2.2:** Share your FV/PV results with the class. | 10 minutes |
|  | **FAR Centre Activity 2.3.1:** Returning to your same teams, create a (monitoring and controlling) Dashboard on A3/11x17 paper using the sample charts (to pick from) for the scenario provided in 2.1.0. You must select the charts, including providing a rationale for their selection. | 20 minutes |
|  | **FAR Centre Activity 2.3.2:** You will present your dashboards to the class and discuss the rationales (why you selected the charts to display). | 30 minutes |
|  | **FAR Centre Activity 2.4.1:** In your groups, do a web search for a “Change Control Request Form” and select the best one that fits the scenario from 2.1.1, modify it as necessary to fit this need. | 10 minutes |
|  | **FAR Centre Activity 2.4.2:** Share your form with the group and explain why you chose this form’s content. | 20 minutes |
|  | **Assessment 2.1: Written Assignment:** Similar to FAR Centre Activity 2.1.1, using the (new) scenario provided, draft a Charter Statement, Scope Statement, 5 line-item basic budget, and a list of 3 major deliverables (in the form of a Work Breakdown Structure (WBS)). | **Tbd** |
|  | **Assessment 2.2: FAR Centre Participation:** Yourdiscussion and presentation participation will be considered by Facilitator and an evaluation will be submitted weekly to the Instructor. Plus, you will submit your Weekly Recap Status Report. | **Tbd** |

## Resources

Purchased Resources (textbooks, DVD):

* Fundamentals of PM (FPM), (Heagney), Chapter 3
* All In One (AIO), (Phillips), Chapter 4
  + AIO Video, “Working with Project Integration Management” (from CD that comes with the textbook)
  + AIO Video, “Time Value of Money” (from CD that comes with the textbook)

Provided Resources (files):

* File: Weekly Instructor Video Recording [Link]
* File: Weekly PowerPoint [Link]
* File: Charter Exercise Project Needs (scenarios) [Link]
* File: FV and PV Worksheet [Link]
* File: Dashboard Instructions and Sample Charts [Link]
* File: Weekly Recap Status Report Template [Link]
  + What topics did I learn this week?
  + What are the key terms I learned this week?
  + What am I going to do with this knowledge?

The most recent ‘PMPP Textbook List’ for all PMPP courses can be found in Moodle.

## Notes on ALL Learning Activities

Note that the learning activities in this course are ungraded, unless specified. All learning activities are designed to help you succeed in their assessments in this course, so you are strongly encouraged to complete them.

## Personal Activities:

The following activities are to be completed **before** your FAR Centre weekly session. Be sure to complete them to be fully prepared. Your familiarity with the topics and concepts will greatly help you participate with confidence during FAR Centre activities.

#### Personal Activity 2.0.1: Watch Instructor Recorded Video

The weekly video is a preview of the topics to be studied for this unit. They are usually 15 to 30 minutes and have a supplemental PowerPoint file. You may find this, like many students, to give you an edge in retaining the content they are ‘about to read’.

* Watch the video here: [link to file added when available].
* Find the supplemental PowerPoint file here: [link to file added when available].

#### Personal Activity 2.0.2: Read Fundamentals of PM (FPM), Chapter 3

This chapter of FPM starts the dive into the ‘10 Knowledge Areas’ of project work. This chapter considers Integration. Namely, how the organizational structure, culture, and the systems/processes affect project planning and project work. You will find this to offer an additional perspective to the All In One textbook.

#### Personal Activity 2.0.3: Read All In One (AIO), Chapter 4

Similar to content in the FPM text, AIO offers a more detailed depiction of the Integration activities. More time is spent of developing the business case for the charter (e.g. calculating the Future Value or Present Value) and stakeholdermanagement.

#### Personal Activity 2.0.4: Watch All In One (AIO) video, “Working with Project Integration”

This video is supplemental to chapter 4 and adds a clear and concise recap of the textbook topics. You will likely begin to think about organizations you have participated in, and their project activity, to discover how they integrated project activity.

#### Personal Activity 2.0.5: Watch AIO video, “Time Value of Money”

This video provides a step-by-step calculation of Future Value and Present Value. These two main calculations are extremely important for determining if, or when (as in priority), a project should start.

## Topic 1: The Project Charter

The charter is more than (just) ‘permission’ to do the project. It denotes at least one major deliverable, any financial impact (revenue and expenses), and some demarcation of timing (a schedule). The charter states the ‘business case’. A charter is a form of an Executive Summary, a term non-project stakeholders may be more familiar with.

As with many of the PMPP assignments, you will begin to obtain experience in writing charter statements. A well-written charter could mean the difference between a project commencing or being shelved.

#### FAR Centre Activity 2.1.1: Write Charter and Scope Statements; Basic Budget; and WBS

Form teams of 3 to 5 and select from a list found in the file, Charter Exercise Project Needs [link to file added when available]. During this exercise, you are welcome to use a web search to consider as samples as your team drafts a Charter Statement and Scope Statement. Included with these, your team will include a mention of the budget and WBS. For example, “We want to form a team to accomplish \_\_\_\_\_\_ (deliverable) for $\_\_\_\_\_\_ investment, to be completed by \_\_\_\_\_ (date).”

Budget details should include: “$\_\_\_\_\_ investment yields $\_\_\_\_\_ return.” Yes, you will have to ‘make up’ the numbers… it is the format that is the most important. (Try to have the numbers somewhat believable, though.)

WBS details should be 3 to 5 milestones, with dates… the last one being completion. Like the budget, you are fabricating (estimating) the schedule. Ending with a proper format is the most important part of this exercise.

#### FAR Centre Activity 2.1.2: Charter, Scope, Budget, and WBS Presentations

After 2.1.0 is completed, your team will share the results with the class. Students will have an opportunity to ask questions, offer comments, and help each team to refine their final version. This should take about 3 to 5 minutes per team.

Your team’s final version be shared with each student on your team. Then, you will upload this file into Moodle, along with your Weekly Recap Status Report.

* Following the weekly FAR Centre session, you will submit a Weekly Recap Status Report to denote:
  + Your recap of topics discussed
  + Select from your list the most important and comment as to why it is important to you
* Facilitator Note: Provide feedback to the instructor on each student’s helpfulness and level of participation.

## Topic 2: The Time Value of Money

We are all familiar with inflation: The value of money today will be lower in the future. To overcome inflation, we invest to achieve a higher return (profits) than the inflation rate. Therefore, we have to choose in what we invest in.

For many organizations, it works the same way. They have money now and need to decide what to invest in. Given this, there is a calculation, called Future Value, that allows you to estimate the final total value (the duration or the project is included in this formula). The Future Value can help you decide to invest (yes or no), or if you have multiple projects to select from, you can calculate FV for each and choose to take on the project with the highest return.

Plus, you can do this calculation in reverse, called Present Value, (‘We want X money when this is done. How much do we have to invest now/in the present (including the rate of return) to achieve this?’).

#### FAR Centre Activity 2.2.1: Return to your teams and calculate the FV’s and PV’s

Returning back to your groups, refer to the FV/PV Worksheet [link to file added when available]. There are different scenarios listed. Your team is to calculate the FV or PV (depends on the scenario). Be sure to pay close attention to the details to ensure your team selects the correct formula.

You are welcome to review the video from Personal Activity 2.0.5.

#### FAR Centre Activity 2.2.2: Share your FV/PV results with the class

After your calculations are done, the group will reconvene to discuss the answers. It is important for you to be able to discern the correct formula to use, and to calculate it properly.

* During this discussion time, of your team gets ‘stuck’, the Facilitator will be provided with the key, and an explanation of how the calculations were completed.

## Topic 3: Monitoring and Controlling a Project

#### FAR Centre Activity 2.3.1: Create a (Monitoring and Controlling) Dashboard

Your team will use the same scenario from 2.1.1. The Facilitator will provide you with a file of sample charts to pick from. Your team will be selecting the best 8 charts to determine the health of your project. (You will assume the project is in progress, approximately 50% completed.)

On A3/11x17 paper, using the sample charts (to pick from), you must select the BEST 8 charts for your scenario, including providing a rationale for their selection.

But this is not JUST picking charts. Your team must justify the choices. Considering this is a hypothetical scenario, you must also assume you have a collection of stakeholders to ‘keep happy’. What do THEY want to know?

Don’t forget, a dashboard is NOT JUST for giving a ‘snapshot’ of the status (monitoring) … the charts are to help the stakeholders make educated decisions (controlling) about the project. Because of this, DO NOT pick the charts that share ONLY ‘happy news’.

#### FAR Centre Activity 2.3.2: Present your Dashboards

Your team will denote on WHY your charts were chosen. Your team will make their presentation, and the other students should offer probing input to ‘question’ your rationales.

Sometimes, there is not a ‘correct answer’ for every chart, as this is driven by the desires of the stakeholders within a given project. It is OK (and maybe fun) to discuss the stakeholder (communication) ‘requirements’ for your scenario. For example, some stakeholders don’t care much, and others ‘want to know everything’.

## Topic 4: Change Control Systems

Nearly 100% of the time, changes MUST occur within a project. Sometimes this affect high level PM aspects, like the charter and scope. Other times, the changes are low level and are specific to the project work itself (like a component revision).

Either way, to ensure these change ‘needs’ are reviewed by the appropriate stakeholders, every project must be a change control system. The primary document of this system is the Change Control Request Form. These forms must consider Corrective Actions (to immediate fix a problem) AND Preventative Action[[1]](#footnote-1) (to keep it from ever happening again. Plus, this must include space for stakeholders to ‘sign-off’ on the Change Control Request Form. (Keep in mind that not all change requests are approved.)

Your team will construct a Change Control Request Form to fit your scenario.

#### FAR Centre Activity 2.4.1: Build a Change Control Request Form.

(This exercise is best if you think about the whole change control needs of the entire organization represented in your scenario. (I.e. Can you establish a change control system that can handle ALL organizational changes, not just project work?))

Your team will determine the change control system needs and then create a Change Control Request Form. You can either create the new form, or you can modify what you find. For those that choose to modify an existing form, do a web search for a “Change Control Request Form” and select the best one that fits your scenario from 2.1.1, then modify it as necessary to fit your need.

There are likely MANY options that would fit all of your needs. Take your time comparing different forms.

Some topics to consider:

* Being TOO specific could prove to have negative impact
  + Again, you would strive for a Change Control Request Form that could be used throughout the organization… and NOT just for project use
* Proper description of the change request
* Accommodates BOTH Corrective Action and Preventative Action (CAPA)
* Allows for revision during the approval process
* Provides space for stakeholder sign-offs
* Clearly denotes financial and time impacts
* Target a single page, if possible
* In the bigger picture, each form would be entered into a Change Request Log[[2]](#footnote-2)

#### FAR Centre Activity 2.4.2: Share your results with the group.

Each team will share their forms. They must justify the existence of each line of content. Students should offer input to each presentation for improvements. Forms should be clear and concise, but powerful.

## Unit 2 Summary

In this unit, you have had the opportunity to learn about…

1. When an organization decides to attempt a project, it must be ‘integrated’ into their organizational structure and culture.
2. Integration occurs through:
   1. Melding the project charter with the organization’s missions and values.
   2. Investigating the financial goals and impact through Earned Value (EV) calculations.
   3. Fitting with the organization’s Change Management System.
3. Project success depends on the integration being proper and thorough.
   1. Driven by the leadership skills of the project manager.
   2. Evident in strong communication as part of the organization’s monitoring and controlling system.

## Assessments

### *Assessment 2.1: Written Assignment*

Use the scenario [link to file added when available] to draft a Charter Statement and a Scope Statement. Try to NOT be ‘wordy’. Plus, you will draft a simple budget (say, 5 line-items) and a brief WBS of major objectives (deliverables).

For the Charter Statement, you should use a MAXIMUM of 2 paragraphs. In each paragraph, use a MAXIMUM of 4 sentences each.[[3]](#footnote-3) The content should be something like, “Our project to \_\_\_\_ will yield in \_\_\_\_ (one or two deliverables) for \_\_\_\_ (money) by \_\_\_\_\_ (time).

The Scope Statement, also brief, should denote what is included within the project, but also what is NOT included. For example, “This project is limited to \_\_\_\_\_, and shall not include \_\_\_\_\_\_.”

The budget portion of this assignment is focused on FORMAT. You may have never budgeted before; no worries, but consider a web search for a simple budget. Much like the WBS, this would be a ‘high level’ (NOT detailed) budget. You will likely have to fabricate some line items and their numbers, so try to estimate them (and keep them believable).

The WBS should denote your three top deliverables of the project. Projects can easily be split into Planning and Executing. Usually *planning* is the first milestone and then a couple milestones within *executing* are included.

For all of the above, you will need to use at least 3 APA-formatted citations for any source, including those that offer guidance in formatting.

You will upload this into Moodle for grading.

### *Written Assignment Grading Criteria:*

The grading of the Written Assignment will be based on the PMPP Standard Rubric:

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| --- | --- | --- | --- |
| **Syntax and Spelling:** | |  |  |
|  | Emerging (0 to 6 points) | Developing (7 to 8 points) | Mastering (9 to 10 Points) |
|  | Student appears to not have checked for spelling and grammatical errors. Sentence structure is difficult to follow. Basic composition rules may not be followed. APA formatting has errors. | There are limited minor errors in spelling or grammar. The content may not flow smoothly and may be disjointed in thought and application. APA formatting is adequate. | There is either no errors or just a minor error in spelling or grammar. The content flows well and are a solid example of proper composition elements of style. APA formatting is exemplary. |
|  |  |  |  |
| **Thorough Answers to Assignment:** | |  |  |
|  | Emerging (0 to 21 points) | Developing (22 to 30 points) | Mastering (31 to 35 Points) |
|  | Student may have simply just answered the assignment demonstrating limited knowledge of the content, lacked depth, and offered limited (or no) sources. Major points of the assignment are not developed. | Student answered the minimum of the assignment and offered undeveloped use of sources. They may need to cultivate some portion(s) of the assignment more in order to head toward mastery. | Student has clearly mastered the assignment content and properly used sources to thoroughly prove their thesis Content is clear and concise, without being too wordy; finishing with a great conclusion. |

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| --- | --- | --- | --- |
| **Personalization/Examples:** | |  |  |
|  | Emerging (0 to 21 points) | Developing (22 to 25 points) | Mastering (26 to 30 Points) |
|  | Student offers shallow or no personal examples to support their thesis. | Student shows personalization, but may be offering 'someone else's story' or one that doesn’t fit the assignment. Application of the content may not be thoroughly explained (to fit their thesis). | Student offers are least one strong example from personal experience, and fits well with their thesis and conclusion. Impact on faith may be included in the answer. |
|  |  |  |  |
| **Professional Presentation:** | |  |  |
|  | Emerging (0 to 9 points) | Developing (10 to 12 points) | Mastering (13 to 15 Points) |
|  | Paper is offered in an acceptable presentation but lacks consistent formatting. Paragraphs are too large. Word choice may not be appropriate for the ‘business style’ required for this course. Overall appearance detracts from the content. | Paper is better than an ‘acceptable’ presentation. Paragraph size is appropriate (limited to 4 sentences each) and word choice is fitting. Overall appearance is on the brink of greatness. | Paper is very professional looking. Paragraphs are well formulated. Excellent word choice and appearance add to the overall content. Total appearance is exceptional. |
| **Sources:** | |  |  |
|  | Emerging (0 to 5 points) | Developing (6 to 8 points) | Mastering (9 to 10 Points) |
|  | Student use of citation(s) does not comply with the assignment minimums; and sources are (just) from textbooks. | Student uses minimum quantity of required citations, but a majority are from the textbook(s). | Sources are rarely from textbooks and often from creative sources. |

### *Assessment 2.2: FAR Centre Participation*

You are expected to complete your reading assignments prior to class. Then during class, opening (with honesty and respect) join in on class discussions, small group discussions, and presentations.

Plus, you will submit a Weekly Recap Status Report (uploaded onto Moodle), using the template provided. You can score up to 100 points for this.

### *FAR Centre Participation Grading Criteria:*

Using the TWU general guide to grading found in the syllabus, the Facilitator will provide a score (and any applicable feedback) to the Instructor, namely, an evaluation of each student’s participation in the weekly sessions. Since these cannot be made up, attendance is mandatory.

For the Facilitator feedback, scoring is based on the below rubric.

* Attendance: 0 points for an absence, 10 for being late, and 25 for full attendance
* Attentiveness, up to 25 points
* Quality of class & small group discussions, up to 25 points
* Quality of presentations, up to 25 points
  + In the event of group presentations, the group will share the same score

Plus, you will submit a Weekly Recap Status Report (uploaded onto Moodle). You can score up to 100 points for this.

## Checking your Learning

Before you move on to the next unit, you may want to check to make sure that you are able to:

* Draft the key portions of a project, including:
  + Charter Statement
  + Scope Statement
  + High-level budget
  + Major milestone WBS
* Calculate Future Value and Present Value as key financial formulae to make decisions to start a project and/or to select projects to do.
* Determine the communication needs of stakeholders and build a monitoring and controlling ‘dashboard’ of charts.
* Select/build a Change Control Request Form that fits within the change control system (needs) of an organization.

1. Corrective Action/Preventative Action (CAPA) systems are discussed in detail in another PMPP course. [↑](#footnote-ref-1)
2. Usually logged in an Excel file with password protection. [↑](#footnote-ref-2)
3. This is a standard Executive Summary format. [↑](#footnote-ref-3)