

Draft #3
Wideman Glossary Update Progress Report
Structure around projects, programs, portfolios and other definition challenges
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Introduction

One of the benefits of the Wideman Comparative Glossary of Project Management Terms is that it is a great learning tool. By following the associated links from a given definition, one can learn a lot about the subject matter in question. But Glossary v5.5 is now four years old and is in need of an overhaul, especially in the light of recent project management developments. In these four years we have continued to add new definitions, and revisions to existing definitions to our glossary reference database.

These additional definitions come from a wide variety of sources such as papers, articles and new book publications like those we have reviewed on this web site. Interestingly, most of the new terms added relate to program management and project portfolio management. So what we now have in the database is over 400 new terms, although in our overhaul we have purged over 300 definitions that now seem obsolete or at least redundant. That still leaves us with close to 7,000 entries. However, 7,000 does seem like an overwhelming number, especially when many of the new terms have apparently different meanings when applied to different project management uses.

Indeed, in the course of our research over the last few years we have noticed a number of developments. The first and perhaps the most fascinating is that the intent of some terms have either expanded or changed focus. The most notable of these of course is the shift in meaning of the term "Project Management" itself. As we described in our paper [The Potential for A Project Management Framework Standard: Are we ready?](#),¹ in most instances the term Project Management now refers to a whole hierarchy from Governance to Tools & Techniques.

Meantime, a number of sources of "official" definitions still continue to define project management as the management of a single project. This issue is not new of course, having been raised over a decade ago. Still, it does now seem that the term Project Management to mean the whole gamut of project activities from project to portfolio management is much more prevalent, and more readily accepted today. So it is high time that this shift is accepted and fixed amongst the "official" Glossaries.

The second development is that many authors have found the need to introduce new terms to help explain their specific discourse. Each of these we have studiously added to our Glossary database but, as might be expected, not all authors agree. That is, different authors with different backgrounds and different subject matter have different ideas about defining essentially the same labels. So thinking that all terms can be boiled down to one definition is a happy delusion.

But now, how can we make the Glossary presentation more useful in the next update?

Let's assume, as indeed we believe, that project management exists as a hierarchy from Project Governance down through Project Portfolio Management, to Program Management, to (single) Project Management, to Tools & Techniques. We think that in general, someone working in the field of, say, Portfolio Management, is unlikely to be very interested in Tools & Techniques. Conversely, those who make a living from applying project management's Tools & Techniques might appreciate a Glossary

specifically dedicated to that particular area.

However, it's not that simple. Not only is there a range of "levels" of project management, but there is also a large array of project management application areas. For those working in, say, Engineering, Procurement and Construction, are they interested in a large number of definitions mostly applicable to, say, Information Technology? Would they find that a Glossary more dedicate to their area of interest more useful? We think that is quite possible. Would such a Glossary include relevant Tools & Techniques? We think it should.

So, for the past nine months we have been working our way through the 7,000 odd Glossary entries trying to identify which definition belongs where — and at this time, we are still at it.

But now we have encountered another significant problem. For example, is Program Management really different from Single Project Management (SPM), or is it just SPM on steroids? For many, the jury is still out on this one. If the answer is the latter, then it hardly deserves a separate level in the project management hierarchy described above. So let's examine that issue first.

What is Program Management?

To answer this question, we can turn to an Extract from GAPPS (2011) [A Framework for Performance Based Competency Standards for Program Managers](#).² This work by GAPPS concluded that there are a whole variety of "Program" situations to start with. For example, GAPPS quote three definitions as follows:³

"Definition of a program

- "A temporary, flexible organization structure 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 an organization's strategic objectives; a program is likely to have a life that spans several years."⁴
- "A program is a set of related projects and organizational changes put in place to achieve a strategic goal and to deliver the benefits that the organization expects."⁵
- "A group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. Programs may include elements of related work outside the scope of the discrete projects in the program."⁶

Other definitions of program tend to be conceptually similar to these three: all recognize that a program is expected to actually deliver benefits (rather than just create the potential for benefits), and all recognize the existence of multiple, discrete projects within a program.

"Types of Programs

Programs and program management span a wide range of undertakings:

- Development or expansion of a major transportation system such as a subway or an urban highway
- Implementation of an Enterprise Resource Planning system and the supporting

- policies, processes, and procedures
- Organizational change to implement a new corporate strategy
- A crisis response
- Information Technology (IT) department support for a single line function such as sales or engineering

However, some key characteristics of programs often vary considerably:

- Program manager's authority to originate or terminate projects
- Degree of integration with the sponsoring organization
- How the sponsoring organization will evaluate the program manager's performance
- Number of projects
- Interdependence of projects
- Similarity of technical disciplines
- How the program is initiated and the criteria for termination."

GAPPS Program Typology⁷

"To determine the impact of these differences, GAPPS developed a typology of programs based largely on the work of Sergio Pellegrinelli (IJPM, 2005) and Alan Stretton (unpublished review of program management literature, 2007). These are shown in Figure 1.

Program Characteristic	Type of Program			
	Strategic Program	Operational Program	Multi-project Program	Mega-project
General Purpose	Deliver assets and benefits that are directly linked to attaining the sponsoring organization's desired future state	Deliver assets and benefits that are critical to the sponsoring organization's day-to-day operations	Achieve synergies from projects with common traits such as shared resources, similar clients, or product technology	Deliver a specific asset to the sponsoring organization
Key Differentiating Feature	Link to a specific business goal or strategic initiative	Relative interdependence of constituent projects	Relative independence of constituent projects	Significantly larger than the sponsoring organization's typical projects
Reason for Grouping Projects	Early results influence decisions about later projects	Minimize negative impact on ongoing operations	Benefits expected from synergy	So much larger than the organization's typical projects

Figure 1: GAPPS Program Typology⁸

"Further analysis and extensive discussion with program managers led to the following conclusions:⁹

- The role of the program manager is fundamentally the same for strategic programs, operational programs, and multi-project programs: the type of program does not affect the role.
- Although a mega-project is often called a program, the role of the manager of a mega-project is substantially different from that of the managers of the other program types. As a result, ***this framework does not cover the role of mega-project manager.*** (Emphasis added)
- Multi-project programs are often similar to project portfolios. However, the role of project portfolio manager is different enough that most project portfolio managers will not to be able to satisfy program manager performance criteria."

Distinctive Attributes of Projects, Programs, Portfolios

If we have now established that Program Management is a distinct discipline in its own right, we can go further and seek the distinguishing features between Projects, Programs and Portfolios. In May 2016 we reviewed author Michel Thiry's book [Program Management](#). In his book, Michel provided an excellent table that answers our question exactly. Here it is, see Figure 2, reprinted with the author's permission.

Area	Project	Program	Portfolio
Scope	Set limited scope with clearly defined deliverables.	Broad scope with flexible boundaries to meet medium-term expected business benefits.	Organizational scope adapted to corporate goals.
Change	Change should be avoided; baseline is key.	Change is first seen as an opportunity.	Monitor environmental changes that affect the corporate strategy.
Success	Measured through respect of cost, time, quality preset parameters.	Measured in financial terms, value creation and benefits realization.	Measured in terms of overall portfolio performance: maximum results, minimal resources.
Leadership	Transactional leadership, authority-based directive style, management of subalterns, conflict resolution. Rational decision-making.	Facilitating style, management of powerful stakeholders, conflict resolution. Intuitive decision-making.	Administrative style focused on adding value, power results from allocating resources. Rational decision-making.
Role	Task and parameters management; product (project output) delivery.	Pacing and interfacing of projects; benefits delivery.	Resource management across portfolio; deliver value to corporate stakeholders.
Responsibility	Project output delivery to parameters; reporting performance-based focus.	Strategic decision implementation, develop opportunistic emergent strategies.	Align portfolio with corporate strategy, adjust portfolio with regard to changes in organizational environment.

Main Tasks	Negotiate scope, define WBS, minimize adverse risks, and manage delivery of the product of the project. Maintain project team stamina and motivation, monitor and control external team.	Coordinate component project resources and key deliverables; market program and build business case on a regular basis; develop and maintain project managers' team spirit and contribution to program.	Allocate resources to portfolio components, reassess portfolio on an ongoing basis; collect and use program and project data to make decisions.
Control	Monitor and control tasks and project parameters retrospectively against baseline; Report to project sponsor.	Appraise component project deliverables and resource usages prospectively against expected benefits; Report to business stakeholders.	Measure aggregate value of portfolio retrospectively against preset corporate performance indicators; Report to corporate stakeholders.

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Figure 2: Detailed comparison between Projects, Programs and Portfolios¹⁰

Notwithstanding this tabulation, the positioning or determination of a particular initiative is not always so clear-cut. Michel offers a further suggestion.

Is it a Program or a Project?

In his book, Michel Thiry offers a tabulated approach for deciding is it a Program or is it a Project? This analysis is based on five Factors that should be assessed on a scale of 1 to 3 by at least three distinct assessors, typically the Sponsor, a representative of the PMO, and a member of the portfolio management or strategy development team. Their answers should be tabulated as "A, B, & C" in Figure 3.

Factor	1	2	3	Score		
				A	B	C
Convergence of objectives	Agreed	Negotiated	Emergent			
Predictability of outcome	Likely	Unlikely	Unknowable			
Focus	Technical	Structural	Cultural			
Outcomes	Operational	Strategic	Contextual			
Level of change	Handover	Transfer	Transition			
			Individual scores			
			Average Score			

© Michel Thiry

Figure 3: Distinguishing between Program and Project¹¹

Author Michel Thiry recommends that if the average score is between 5 and 9 it be considered a Project. If the score is between 10 and 15, it is more likely to be a Program. However, Michel recommends that readers/users of this tool should read the whole of Section 3.2.1 of his book *Program Management*,¹² to get a better grasp of the issues.

Summary and Conclusions

In the course of our project to update the Wideman Comparative Glossary of Project Management Terms (The Glossary) we have accumulated a number of findings as reported in this paper.

About the Glossary

- The Glossary has not been significantly updated since the last available version for purchase, version 5.5 first issued in March 2012.
- The Glossary database now has close to 7,000 entries.
- In the interval since 2012 we have accumulated a further 400+ new terms.
- A purge of the database has taken us nine months so far and has led us to delete 300+ entries
- The Glossary is an excellent source of learning when you visit a particular definition and follow its associated links.

About the subject matter

- Project Management can be viewed as a hierarchy of disciplines ranging from Governance at the top, down to Tools & Techniques.
- Given the foregoing descriptions, we conclude that Program Management is a separate discipline in its own right.
- Intermediate levels, i.e. Portfolio, Program and Project are generally clearly distinguishable.
- Many authors of recent books on various aspects of project management, especially in the areas of portfolios and programs, have found the need to introduce new terms to suit their purpose.
- Common agreement amongst project management practitioners of the best definition for some of these terms will take time.
- In the meantime the "official" definition of some terms is no longer consistent with common usage. The definition of "Project Management" itself is a case in point.

Finally, thinking that all terms can be boiled down to a common definition, regardless of the environment, is a happy delusion.

Early in this paper we posed the question: How can we make our Wideman Comparative Glossary more useful in the next update?

Assuming that we have now settled some of the early issues, we can move on to other Glossary challenges. The definitions in the Glossary obviously span the whole gamut of project management Areas of Applications. But these number in the hundreds, if not thousands, far too many to be singled out individually. So some sort of high-level grouping needs to be devised. Many sources do group their identified Areas of Application, but even these numbers of groups are too many to handle in the Glossary.

How we solve this challenge will be written up in a separate paper when our updating of the database has got further advanced and reasonably tested.

Stay tuned – as they say.

R. Max Wideman

¹ See this page specifically [Expansion of the Term Project Management](#)

² Global Alliance for Project Performance Standards (GAPPS), Sydney, Australia. Parts of the Extract published here with GAPPS permission received by Email 7/21/16

³ Extract from GAPPS (2011) *A Framework for Performance Based Competency Standards for Program Managers*.

⁴ *Managing Successful Programmes*, UK Office of Government Commerce, 2007

⁵ *IPMA Competence Baseline*, International Project Management Association, 2006

⁶ *The Standard for Program Management*, Project Management Institute, 2008; adapted from *The Handbook of Project-Based Management*, J. Rodney Turner, 1992

⁷ Extract from GAPPS (2011), see <http://globalpmstandards.org/wp-content/uploads/2014/12/GAPPS-Program-Typology.pdf>

⁸ Ibid

⁹ Ibid

¹⁰ From the book: *Program Management* by Michel Thiry, Gower, 2015, pp32-33. Copyright © Michel Thiry. Reproduced with the author's permission, R. Max Wideman, July 8, 2016.

¹¹ Ibid.

¹² Ibid, pp. 58-69.