**UCSB Professional and Continuing Education (PaCE)**

TMP X451.007 - PM Certification Series: Project Planning and Procurement

**Instructor:** Jason A. Gonzalez – PMP, CPSM

**Contact Information:** jason.gonzalez@ucsb.edu, (323) 422-1053

**Location of Class:** Live Online, via Zoom meeting

**Meeting Time & Dates:** 6:00 – 9:10 PM, Tuesdays from Jan. 4th – March 15th, 2021 (11 Meetings)

**Prerequisite:** Completion of UCSB PaCE TMP X450 Intro to Project Ma nagement or equivalent professional experience. If you have not completed an Intro to PM course, please contact the instructor for clearance

**Course Overview**

This class will build upon concepts and methods presented in the Introduction to Project Management course and will consist of a deep dive into two of the most important aspects of Project Management – the project planning and procurement knowledge areas. Over the weeks, the course will address all associated phases, processes, documents, and outcomes of these crucial project activities while underscoring their interconnectivity to the other areas of project management. This includes knowledge of best practices, associated terms, review of real-world case examples, and discussion of common risks and how to avoid them.

**Learner Outcomes**

Upon successful completion of this course, students will be able to: Direct and manage planning efforts for their project, including defining scope via requirements gathering, activity estimations, resource management and projecting a schedule. Authoring of the specific sub-plans by area will be discussed and practiced. Students will also gain insights into vendor solicitation, product selection, contract types, RFx sourcing activities, budget and vendor management techniques and procurement completion tasks.

**Course Format**

Weekly lectures and accompanying reading in texts, along with real-world case study analysis and discussion. Students will also work in small groups to formulate and present a project plan and the associated procurement outputs, which will be presented in the final weeks of class

**Course Texts**

* “A Guide to the Project Management Body of Knowledge” (aka “PMBOK Guide”), 6th Edition (2017), ISBN: 9781628251845, [www.PMI.org](http://www.pmi.org/)
* “Project Procurement: A Real-World Guide for Procurement Skills” by Ajay Bargrove, 2nd Edition (2018), ISBN: 9781628254686

**Homework Policy:**

All assigned reading should be completed before the start of the next class, as we will discuss the concepts, terms and case studies during our lecture session. Also, all work assigned to your project group will be due by 5 PM the day **before** the next class – this will allow the instructor time to review and comment on the work submitted in advance.

**Course Subjects by Week**

**Pre-Class Activities and Reading:** Obtain copies of class texts, read Project Mgmt. Body of Knowledge (PMBOK) – Chapters 1-3 and Project Procurement: A Real-World Guide to Procurement Skills (Real World), Chapter 1

**Week 1**: Review of **Project Planning,** with special focus on **Procurement activities**/processes and terminology.

Assigned Readings/Homework: PMBOK – Chapter 4

**Week 2:** Deep Dive into the **Project Knowledge Areas** and associated **Plans, Defining Scope and Creating WBS**

Assigned Readings/Homework: PMBOK – Chapters 5-6 / Project idea and Business Case and/or Charter

**Week 3:** Project Planning, continued - Sequencing and Estimating Activities, **Developing a Schedule and Budget**

Assigned Readings/Homework: PMBOK – Chapters 11 & 13 / Draft WBS and Gantt Schedule

**Week 4: Stakeholder Identification and Management** – Power/Interest, RACI, Risk Assessment

Assigned Readings/Homework: PMBOK - Chap. 12; Real World - Chapters 2-3 / Stakeholder & Risk Registers

**Week 5: Project Sourcing Activities** – **Initiating and Planning** Procurement, **Supplier Management, Quality**

Assigned Readings/Homework: Real World - Chapters 4-5 / Procurement Plan and high-level Quality Plan Drafts

**Week 6:** Project Procurement: Practice Quiz, **RFx Events**: Definitions & When to Use, **Standard Contract Types**.

Assigned Readings/Homework: Real World, Chapter 6 / RFx proposal package (RFI, RFQ, RFP)

**Week 7:** Overview of **Negotiation Techniques,** Long Term Agreements, Terms and Conditions

Assigned Readings/Homework: Real World, Chapters 7-8

**Week 8:** Project **Contract Management,** **Invoicing,** Tracking of Work and Escalation of Issues

Assigned Readings/Homework: Real World, 9-11

**Week 9: Completing Planning and Project Procurements**. **Review of Presented Material**: Concepts, Definitions, Techniques and Processes

Assigned Readings/Homework: Review of Class Readings and Key Concepts, Complete Presentation Materials

**Week 10: Final Exam, Class Presentations**

**Grading Policy**

Grading: 100-90 = **A**, 89-80 = **B**, 79-70 = **C, etc.**

**Point/Percentage Breakdown:**

In Class Participation/Attendance 40%

Group Assignments, inc. timeliness 10%

Project Documentation/Presentation 30%

Final Exam 20%

**Note:** To pass this class will require a commitment to attend **all** scheduled lectures. Exceptions to the attendance requirement will be made only if the instructor is notified well in advance (no less than 48 hours)