UCSB Professional and Continuing Education (PaCE)

TMP X451.008 - PM Certification Series: Project Planning and Procurement

Instructor: Jason A. Gonzalez – PMP, CPSM

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Location of Class: TBD

Meeting Time & Dates: 6:15 – 9:45 PM, Tuesdays from Jan. 4th – March 15th, 2020 (11 Meetings)

Prerequisite: Completion of UCSB PaCE TMP X450 Intro to Project Management 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 processes, documents, phases 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

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

Assigned Readings/Homework: Project Mgmt. Body of Knowledge (PMBOK) – Chap. 4; “Real World” – Chaps. 1 & 2

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

Assigned Readings/Homework:

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

Assigned Readings/Homework:

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

Assigned Readings/Homework:

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

Assigned Readings/Homework:

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

Assigned Readings/Homework:

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

Assigned Readings/Homework:

**Week 8:** Project Contract Management: Invoicing, Tracking of Work and Vendor Relations

Assigned Readings/Homework:

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

Assigned Readings/Homework:

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

Assigned Readings/Homework:

**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)