

DEVELOPING THE CORPORATE STANDARDS ON PLANNING PROJECTS IN REAL ESTATE AND CONSTRUCTION SECTOR

Ya.D. Gelrud¹, gelrud@mail.ru,
O.A. Klimenko^{2,3}, okian@mail.ru,
M.V. Shishkin², okian@mail.ru

¹ South Ural State University, Chelyabinsk, Russian Federation,

² The Russian Presidential Academy of National Economy and Public Administration, Moscow, Russian Federation,

³ Green Project Management in Russia and CIS, Moscow, Russian Federation

Project management is an important stimulus for development of different countries and regions, industries, as well as organizations – companies and firms. Projects realization aiming to help organizations in achieving its strategic goals have to have the certain management system, including all processes from initiation till completion with the key role of planning. The challenge that companies faces today is to develop the adequate and optimum corporate standard at the company level when the project management standards and the sector (industry) normative documentation have different glossaries and terminology. Companies task is to develop the norms and rules at its level that will give the possibility to organize the project planning processes combining the existing PM methodologies approaches and specific sector normative documentation. In modern world it is important to develop and apply planning processes to provide the companies with the tools to achieve the goals and objectives in more efficient way both at the organization and separate projects levels as social and economic systems. The authors of the article analyze planning processes in the existing project management international and national standards, define the problem and set the task of developing the project planning standard for application in the certain sector of economy or industry.

Keywords: project planning, project management, management by projects, planning process, project management standards, projects as social and economical systems.

Introduction

Currently, in all developed countries, project management is a rapidly developing branch of organizational and economic science and is considered to be generally accepted methodology for investment and innovation projects. An important strategic decision for the Russian Federation was made on introduction of modern project management methods in all state authorities branches. It gives the opportunity to the country to become more competitive at the global market, creates value in the form of product innovation when implementing programs and projects results and improving the quality of life of people.

The project being a separate socio-economic system is characterized by possessing the following characteristics – goals and objectives, novelty (uniqueness), limited resources, primarily time, and life cycle, which is completed with transfer the project product and results to the customer with the required quality level. The project has both characteristics that are inherent in any socio-economic system and the distinctive, peculiar ones due to uncertainty and variability in the nature of the project. Organization is the socio-economic system, formed to achieve the goals existing as long as these goals and objectives are achieved. Projects have the same characteristic too. The project organizes people to achieve goals and to obtain the planned results with well-defined criteria. They are based on the accepted rules, processes and procedures, i.e. control systems.

The project is a set of interrelated activities, aiming to create a unique product or service in terms of time and resource constraints [1]. The basis of the project management is the planning process, one of the most important functions of management in socio-economic systems, which is continuously carried out in all phases of the project life cycle. Most of the existing international and national project management standards, in which the planning process is given a significant role, describe the steps, procedures, methods and tools to effectively allocate the available resources to achieve the project objectives. However, they all have limitation as they do not take into account sector/industry or corporate specifics. Many companies face the challenge of adapting the high level standards generic description of the plan-

ning process in relation to their corporate objectives and the specific areas of activity. In this article, the authors analyze the existing approaches to the project planning described in the international and national project management standards in order to identify the basis for the development of an industry standard project planning in relation to real estate and construction.

Planning process in the project management standards

Project management at each hierarchical level includes the implementation of a number of tasks and decision-making in local, regional, national and international context [2]. To manage a project is the apply knowledge, skills, methods, tools and techniques for planning, organizing, monitoring and control of all aspects of the project with the aim of achieving or exceeding (within the allocated resources) participants' expectations of the project [2]. The purpose of planning is to develop a perfect model of the project, and then to find the best way to do the work to achieve the goals and objectives of the project in changing situation.

Planning process starts with the development of the high level milestone plan at initiation and ends in the detailed work plan for the final phase of the project. The main result of the planning stage is the project management plan that integrates all functional areas plans. During the project execution there is constantly work to refine and detail the plans in order to achieve all the results and project objectives. The functional areas to be planned are time, cost, quality, organization, communication, risk, procurement and contracts, changes, other components of the project [5].

Thus, determining the location of the project planning in the structure of the management process, we can say that planning is carried out throughout the project life cycle and is the basis for the successful implementation of the project plan.

Comparative analysis of project management standards of the planning process

The planning process including all functional areas of the project in international and national project management standards were selected for the analysis. The most widespread standards PMI PMBOK 5.0, NTC 3.0 (based on IPMA ICB 3.0), PRINCE 2, GOST R, Agile (Scrum) and P2M were taken for the analysis [3, 4, 6–8]. After analyzing the composition of the functional areas, it may be noted that in most of the standards scope, cost, schedule, human resources, communications, quality, risk and procurement have to be planned when planning the project. At the same time, there are separate areas are included in only one standard, for example, strategy management, innovation, conflict, security, change. To implement projects in all areas of real estate and construction it is important to use a combined approach to develop a corporate standard and use the full list of functional areas that enables organization to comprehensively manage complex projects: subject area (content), time, cost, quality, risk, human resources, communication, stakeholders, procurement and contracts, integration, change, conflict, security, value (innovation), strategy.

When developing the project management standard at the corporate level the company should also take into account the main approach as a basis. Thus, the process approach is used in the standards PMI PMBOK 5.0 and GOST R 54869–2011, competence based approach – in NCB 3.0 (based on IPMA ICB 3.0), agile methodologies are described in the Agile (Scrum) and value-based approach – in P2M [6–8]. All the standards mentioned above describe project management process in five stages – initiation, planning, execution and monitoring, analysis and control, closure, though the terminology is different but the definitions are similar.

To respond the challenge in developing a corporate standard for project planning in real estate and construction, it is important to identify the main criteria by which the organization will be able to choose the most appropriate basis for further – to develop their own rules and regulations for project planning to get the best set of policies and procedures possible. Among the important selection criteria can be the level of details of processes and procedures. The in more detailed level of description of planning process is (with steps/procedures, methods and tools) the easier it is to adapt the company's standard fit for purpose, saving the company's time on “reinventing the wheel”.

Another important criterion can be called method of planning: methods and tools (whether the standard contains the references on tools and methods, other indications of the most effective means) and knowledge (whether standard contains instructions on the what knowledge a project manager should have for a successful implementation).

The criterion of comprehensibility for the Russian mentality is also important, although it is very subjective. Among the distinctive features of the Russian mentality, different experts and researchers mention, for example:

- long preparation and then fast, almost lightning, skill to be mobilized to perform project tasks,
- creativity and ingenuity (as a consequence – “antipathy” to the set and mechanically repeated processes),
- endurance (the ability to work with for a long time overload).

The analysis of selected standards to meet the criteria are presented in Table 1.

Table 1

Comparative analysis of the project planning process in different standards on the basic criteria

		Project Management Standard					
		PMI PMBOK 5.0	NCB 3.0 (based IPMA ICB 3.0)	PRINCE 2	GOST R 54869– 2011	Agile (Scrum)	P2M
Level of details in planning process	Min.		+			+	+
	medium				+		
	Max.	+		+			
Planning by using the methods and tools	tools	+	+		+	+	+
	methods		+			+	+
	knowledge	+	+	+	+	+	
Comprehensive for the Russian mentality	Min.						
	medium	+		+			+
	Max.		+		+	+	
The applicability of the standard to the industry (for example: the real estate and construction sector)	the minimum number of improvements in the adaptation	+					
	the average number of improvements in the adaptation		+	+	+		+
	the maximum number of modifications in adapting					+	
Scope size of projects	big projects	+		+		+	+
	medium-sized projects		+	+	+	+	
	small projects		+	+	+	+	

Comparative analysis of project planning based on the given main criteria has shown that there is no perfect standard for project management which is appropriate and applicable for a particular industry since they all have a number of advantages, and on the other hand limitations and constrains. When developing a corporate standard of project planning in the field of real estate and construction it is recommended that the National Standard GOST R 54869–2011 can be taken as a basis, which has the average in most of the selected criteria, containing a full description of planning tools, processes and functional areas. It is recommended to supplement the benefits of a corporate standard with P2M standard good practices, providing a systematic approach to implementing strategic and innovative goals of the project as well as the optional additions HSSE (health, safety, security, environment) and “conflict management” of the NCB 3.0 (based IPMA ICB 3.0). It is also useful if the company includes into its corporate project planning standard the Agile standard tools and methods at the operational planning level or very small-scale projects that allows to react quickly on changes in the product configuration, coordinate teams and manage task priorities.

With such a combined approach to the project planning the organization can take advantage to apply the good practices of international and national standards. Next step is to take into consideration the other sector standards existing in Russian Federation to include a specific list of types of work, production technology and other necessary components of the sectoral regulations. In this paper, the authors attempt to analyze the basic project management standards in terms of planning process and proposed a combined approach to the development of real estate and construction projects planning standards.

References

1. GOST R 54869–2011. [Project Management. Project Management Requirements]. Moscow, Standartinform, 2011. 10 p. (in Russ.)
2. *Upravlenie proektami: Osnovy professional'nykh znaniy. Natsional'nye trebovaniya k kompetentnosti (NTK) spetsialistov* [Project Management: The Basics of Professional Knowledge. National Requirements for the Competence (NTC) Specialists]. Moscow, JSC “Design Practice”, 2010. 256 p.
3. *Rukovodstvo k svodu znaniy po upravleniyu proektami (Rukovodstvo PMBOK). Pyatoye izdanie* [Guide to the Body of Knowledge Project Management (PMBOK Guide). Fifth Edition]. Moscow, Project Management Institute, 2013. 586 p.
4. Il'ina O.N. *Metodologiya upravleniya proektami: stanovlenie, sovremennoe sostoyanie i razvitie* [Project Management Methodology: Formation, a Modern Condition and Development]. Moscow, INFRA-M, 2011. 208 p.
5. Polkovnikov A.V., Dubovik M.F. *Upravlenie proektami. Polnyy kurs MBA: uchebnik* [Project Management. MBA Full Course: Textbook]. Moscow, JSC “Olympus – Business”, 2015. 552 p.
6. IPMA OCB, Organizational Competence Baseline / *Trebovaniya k kompetentnosti organizatsii v oblasti upravleniya proektami* [Requirements for the Competence of the Organization in the Field of Project Management]. Moscow, OFDM “ECC Design Practice”, 2014. 137 p.
7. Tanakh H. P2M – “A Guidebook of Project and Program Management for Enterprise Innovation” *Rukovodstvo innovatsionnymi proektami i programmami na osnove sistemy znaniy R2M* [Leaders of Innovative Projects and Programs Based on P2M Knowledge Systems]. Available at: <http://ru.m.wikipedia.org/wiki/P2M>.
8. PRINCE2, the official website. Available at: <https://www.prince2.com/uk>.

Received 25 March 2016

УДК 658.1-50

DOI: 10.14529/ctcr160216

К ВОПРОСУ О РАЗРАБОТКЕ КОРПОРАТИВНЫХ СТАНДАРТОВ ПЛАНИРОВАНИЯ ПРОЕКТОВ В СФЕРЕ НЕДВИЖИМОСТИ

Я.Д. Гельруд¹, О.А. Клименко^{2, 3}, М.В. Шишкин²

¹ Южно-Уральский государственный университет, г. Челябинск,

² Российская академия народного хозяйства и государственной службы при Президенте РФ, г. Москва,

³ Green Project Management в России и странах СНГ, г. Москва

Проектное управление является важным стимулом развития на уровне стран, отраслей экономики, отдельных организаций. Проекты, обеспечивающие организациям достижение стратегических целей, должны иметь четкую систему управления, включая все процессы от инициации до завершения, ключевая роль в которой отведена планированию. Сложность, с которой сталкивается компания сегодня, – разработка корпоративных стандартов управления проектами, состоящая в том, что методология управления проектами и отраслевые нормативные документы зачастую имеют разный глоссарий, понятийный аппарат и терминологию. Задача, которая стоит перед организацией, – разработать такие нормы и правила, которые по-

зволят наиболее оптимально выстроить процессы планирования с учетом как рекомендаций международных и национальных стандартов по управлению проектами, так и отраслевых норм и требований. Важно в современном мире уметь разрабатывать и использовать оптимальные процессы планирования с целью повышения эффективности деятельности социально-экономических систем, как на уровне организации, так и на уровне отдельных проектов. Авторы статьи анализируют процесс планирования в составе существующих международных и национальных стандартов по управлению проектами и ставят задачу разработки отраслевого стандарта планирования проектов.

Ключевые слова: планирование проекта, управление проектом, управление проектами, процесс планирования, стандарты по управлению проектами, проекты как социально-экономические системы.

Литература

1. ГОСТ Р 54869–2011. Проектный менеджмент. Требования к управлению проектом. – М.: Стандартинформ, 2011. – 10 с.
2. Управление проектами: Основы профессиональных знаний. Национальные требования к компетентности (НТК) специалистов. – М.: ЗАО «Проектная ПРАКТИКА», 2010. – 256 с.
3. Руководство к своду знаний по управлению проектами (Руководство РМВОК). – Пятое издание. – М.: Project Management Institute, 2013. – 586 с.
4. Ильина, О.Н. Методология управления проектами: становление, современное состояние и развитие / О.Н. Ильина. – М.: ИНФРА-М, 2011. – 208 с.
5. Полковников, А.В. Управление проектами. Полный курс МВА: учеб. / А.В. Полковников, М.Ф. Дубовик. – М.: ЗАО «Олимп – Бизнес», 2015 – 552 с.
6. IPMA OCB, Organizational Competence Baseline/Требования к компетентности организации в области управления проектами. – М.: ОЧУ «УКЦ Проектная ПРАКТИКА», 2014 – 137 с.
7. Танаха, Х. P2M – «A Guidebook of Project and Program Management for Enterprise Innovation» Руководство инновационными проектами и программами на основе системы знаний P2M / Х. Танаха. – <http://ru.m.wikipedia.org/wiki/P2M>.
8. PRINCE2, официальный сайт. – <https://www.prince2.com/uk>.

Гельруд Яков Давидович, д-р техн. наук, профессор кафедры информационно-аналитического обеспечения управления в социальных и экономических системах, Южно-Уральский государственный университет, г. Челябинск; gelrud@mail.ru.

Клименко Оксана Алексеевна, СРМР (IPMA-C), РРМС IPMA, старший преподаватель кафедры управления проектами и программами, Российская академия народного хозяйства и государственной службы при Президенте РФ; исполнительный директор, Green Project Management в России и странах СНГ, г. Москва; okian@mail.ru.

Шишкин Максим Владимирович, студент магистратуры по управлению проектами и программами Института государственной службы и управления, Российская академия народного хозяйства и государственной службы при Президенте РФ, г. Москва, okian@mail.ru.

Поступила в редакцию 25 марта 2016 г.

ОБРАЗЕЦ ЦИТИРОВАНИЯ

Gelrud, Ya.D. Developing the Corporate Standards on Planning Projects in Real Estate and Construction Sector / Ya.D. Gelrud, O.A. Klimenko, M.V. Shishkin // Вестник ЮУрГУ. Серия «Компьютерные технологии, управление, радиоэлектроника». – 2016. – Т. 16, № 2. – С. 145–149. DOI: 10.14529/ctcr160216

FOR CITATION

Gelrud Ya.D., Klimenko O.A., Shishkin M.V. Developing the Corporate Standards on Planning Projects in Real Estate and Construction Sector. *Bulletin of the South Ural State University. Ser. Computer Technologies, Automatic Control, Radio Electronics*, 2016, vol. 16, no. 2, pp. 145–149. DOI: 10.14529/ctcr160216