



a guide to  
Specific Interest Groups (SIGs)  
2017

# Contents

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<b>03</b>	<b>Welcome and introduction</b>
<b>04</b>	<b>APM Assurance SIG</b>
<b>06</b>	<b>APM Benefit Management SIG</b>
<b>08</b>	<b>APM Contracts and Procurement SIG</b>
<b>10</b>	<b>APM Enabling Change SIG</b>
<b>12</b>	<b>APM Governance SIG</b>
<b>14</b>	<b>APM Knowledge SIG</b>
<b>16</b>	<b>APM People SIG</b>
<b>18</b>	<b>APM Planning, Monitoring and Control SIG</b>
<b>20</b>	<b>APM PMO SIG</b>
<b>22</b>	<b>APM Portfolio Management SIG</b>
<b>24</b>	<b>APM Programme Management SIG</b>
<b>26</b>	<b>APM Risk SIG</b>
<b>28</b>	<b>APM Systems Thinking SIG</b>
<b>30</b>	<b>APM Value Management SIG</b>
<b>32</b>	<b>APM Women in Project Management SIG</b>
<b>34</b>	<b>APM publications</b>
<b>36</b>	<b>Volunteer opportunities</b>



## Welcome to the Specific Interest Group guide

APM Specific Interest Groups (SIGs) offer a forum for collaboration and knowledge development in all areas of project, programme and portfolio management.

They are a coming together of practice, consultancy and academia working to produce guides, white papers, conferences, seminars and a space to network and share ideas.

Specific Interest Groups are formed by groups of volunteers and provide a unique meeting place for experts, beginners, specialists and generalists from all industry sectors.

The SIG community is governed by a steering group consisting of:

- four volunteer representatives appointed by the Board;
- an APM board member who has specific responsibility for volunteers
- the APM chief executive;
- APM volunteers manager.

The steering group gives its members the chance to influence the future development of APM SIGs and its role is to co-ordinate SIG initiatives, ensure their alignment with APM strategies and provide general advice to APM on the operation and development of their SIGs.

Representatives from the SIGs meet as a group at two fora every year, jointly over a weekend with the equivalent group from branches, to network and share experiences.

# APM Assurance Specific Interest Group

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## P3 Assurance

P3 Assurance is the process of providing confidence to stakeholders that projects, programmes and portfolios will achieve their scope, time, cost and quality objectives, and realise their benefits.

*APM Body of Knowledge, 6th edition, section 3.6.1*

## Overview

In projects and programmes, the word 'assurance' means different things to different people, depending on the field of interest. For some, it's about achieving quality, for others it's about being sure what they are told is correct, whilst for many it's about being confident that 'things are under control'.

The variety of meanings is reflected in the ways of achieving assurance in projects and programmes, including: quality assurance, safety audits, gateway reviews, independent engineer reviews, internal audits, project audits, contract audits, external audits, peer reviews, control self assurance, etc.

In addition, different types of assurance require different skills which need to be quantified, enabled and supported in different ways.

Are all of these types of assurance actually all trying to do the same thing; is the only difference between them the perspective of the practitioner? If they are all trying to do the same thing, how can we avoid inefficient overlap?



Roy Millard,  
APM Assurance SIG committee member

Effective project and programme assurance should:

- provide confidence to stakeholders that a project is being managed effectively
- provide confidence to stakeholders that a project or programme is on target to achieve the defined deliverables and benefits;
- highlight issues and concerns that put at risk a successful project delivery at a time when effective management action could mitigate the problem.

## About the SIG

The Assurance SIG was launched in 2008 aiming to be the centre of excellence within APM for all issues connected with project and programme assurance. It works in several workstreams directed by its management team. These work streams include:

- project auditing;
- integrated assurance;
- assurance of agile delivery;

Future work streams include:

- business case for assurance;
- people dimensions of assurance.

Recent publications include:

- A Guide to Integrated Assurance.
- Measures for Assuring Projects toolkit.

Future activities include:

- development of assurance training.

# APM Benefits Management Specific Interest Group

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## Benefit Management

Benefits management is the identification, definition, planning, tracking and realisation of business benefits.

*APM Body of Knowledge, 6th edition, section 3.2.1*

## Overview

The decision to leave the EU will undoubtedly result in many organisations rethinking business strategy, and changing the way they work. Organisations, both public and private, that fail to embrace and manage the required changes effectively, will fall behind their competitors, fail to meet their customers' expectations and not deliver the performance that shareholders, ministers and taxpayers demand. A clear and well-conceived vision and strategy for an organisation is nothing without an effective and efficient means of delivering change through a coherent portfolio of projects, programmes and, for some larger organisations, portfolios.

Realisation of benefits in line with a defined strategy is the reason why organisations undertake change. Whether to cut costs, meet a compliance or regulatory need, expand into new markets, or to differentiate itself from the increasingly global competition (or indeed all of these at the same time) it must achieve its change goals whilst remaining flexible and agile to an evolving context. A continuous and rigorous focus on benefits should be at the heart of portfolio, programme and project management.

However, investment in change is finite as is an organisation's capacity to absorb change. This means that it is vital to have the confidence that the investment in change is focused on those areas that are aligned to the strategy and deliver greatest benefit. Benefits management provides the means to achieve this at portfolio, programme and project level.

Benefits management brings together the disciplines that must work collaboratively to achieve the common purpose as well as connecting the world of change delivery to the day-to-day business operations of an organisation. These include, but are not limited to, strategy, portfolio, programme and project management, performance management, accounting, HR, change and contract management.

Benefits management is a through-life discipline that proactively ensures the expected benefits of change are understood and realised. Benefits management ensures that timely and accurate change-related performance information is made available to both the organisation's leadership and its wider stakeholder community. This will only be successful if benefits management practices are fully embedded in an organisation and there are clear accountabilities in place for realisation and subsequent monitoring and tracking of benefits.

## About the SIG

The APM Benefits Management SIG has more than 1,400 members across the UK and globally. SIG membership includes numerous individuals from within and outside the traditional portfolio,



Neil White,  
APM Benefits Management SIG chair

programme and project management (P3M) profession ; illustrating its central role in linking change with business as usual.

The SIG addresses the need for professionalism in benefits management, ensuring that portfolios, programmes and projects deliver their intended value. The APM Competence Framework now includes portfolio, programme and project organisational capabilities and incorporates a benefits management competence area. APM recognises the important synergistic relationship between benefits-driven change and the wider P3M community.

The SIG's vision is to develop and promote benefits management as a core driver of successful P3M and wider change management. We aim to do this by:

- supporting P3M and other business professionals with a strong interest in benefits realisation through knowledge sharing and the opportunity to network
- raising awareness of the central role of benefits management in successful delivery of change and gaining senior buy-in to promote an increased focus on embedding benefits management within public and private organisations;
- becoming the recognised source and portal for the development and dissemination of knowledge on benefits management globally;
- becoming pre-eminent for our contribution to thought leadership on alignment of benefits management, P3M, change management and business strategy;
- providing standards and practical guidelines for benefits management;
- building partnerships with businesses and other professional groups with a strong interest in benefits management.

#### FURTHER INFORMATION

- Bradley, Gerald (Reprinted 2010) *Benefits Realisation Management: A Practical Guide to Achieving Benefits through Change*, Gower
- Jenner, Stephen (2010) *Transforming Government and Public Services - Realising Benefits through Project Portfolio Management*, Gower
- Jenner, Steve (2012) *Managing Benefits (1st edition)*, APMG International
- Matharu, J. and Green, M. (2015) *Practical Benefits Realisation Management: A Practical and Pragmatic Guide Delivering Value from Change*
- Breese, R., Jenner, S., Serra, C. and Thorp, J. *Benefits Management - Lost or Found in Translation*, International Journal of Project Management
- APM (2015) *APM Competence Framework (2nd edition)*, Association for Project Management

# APM Contracts and Procurement Specific Interest Group

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## Contracts and Procurement

A contract is an agreement made between two or more parties that creates legally binding obligations between them. The contract sets out those obligations and the actions that can be taken if they are not met.

Procurement is the process by which products and services are acquired from an external provider for incorporation into the project, programme or portfolio.

*APM Body of Knowledge, 6th edition, sections 3.7.1 and 3.7.3*

## Overview

The APM Contracts and Procurement SIG believes that the above definition of procurement is well established and can be helpfully expanded to include procurement in a project, programme and portfolio environment.

The SIG believes that procurement is the process by which the benefits, enhanced capability, functions/performance or resources (goods and services) required from or by a project or programme are acquired.

It includes deciding the package structure and, for each package, the development and implementation of the:

- contracting strategy;
- contract documents, including the specific scope/requirement;
- process and evaluation criteria for selection and award leading to the effective management of the contracts once entered into.

As projects become more unique, complex, subject to change and therefore more risky a more sophisticated approach to procurement is needed than the typical transactional approach used for the purchase of commoditised goods and services.

This requires an understanding and application of modern procurement concepts and techniques and of the contracts which govern the relationship between the parties. In some industries, this is well established, but in others it is still emerging.





Dr Jon Broome,  
APM Contracts and Procurement SIG chair

Intelligent and effective procurement and contract management means:

- the project is split down into packages which best fit the capabilities of the provider market to deliver each one and the client's ability to manage each package;
- the best provider is selected for each package for the best value price;
- provider's commercial motivations are aligned with the client's so that it is in their interests to deliver the package to the client's objectives, whilst giving legal protection from defaults by the other party;
- the specific contract terms allow the client to proactively manage their project through the contract when risk and change occur rather than reactively administrate what has happened;
- the client and contractor fulfil their obligations under contract.

In short, this leads to projects meeting or beating their time, cost and quality objectives.

## About the SIG

The APM Contracts and Procurement Specific Interest Group:

- exists to promote and disseminate knowledge, understanding and best practice of contracts and procurement in a project and programme environment;
- aims to become a lively and constructive debating forum which takes existing best practice and helps make it better;
- wants to be disseminating knowledge, understanding and developing best practice through a variety of accessible means;
- has a long term aspiration to become recognised as an international forum at the leading edge of excellence in contracts and procurement for projects and programmes.

## FURTHER INFORMATION

- International Association of Contract and Commercial Managers (IACCM) – [iaccm.com](http://iaccm.com)
- Fleming, Q. (2003) *Project Procurement Management: Contracting, Subcontracting, Teaming*

# APM Enabling Change Specific Interest Group

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## Enabling Change

Change management is a structured approach to moving an organisation from the current state to the desired future state.

*APM Body of Knowledge, 6th edition, section 3.2.4*

## Overview

The APM Enabling Change SIG's mission is to "improve the change capability of organisations, teams and individuals".

The pace of change is constant and ever increasing. Organisations, team and individuals are in a more or less permanent state of flux as they respond to technological advancements, competitive and economic pressures, and changes in local and global policy and legislation. Programmes and projects are created to enable the resultant range of business, technological, environmental and process change initiatives. There are common factors that contribute to the success of such change programmes and projects, many of which are well documented in the plethora of change methods and standards available to us.

The APM Enabling Change SIG aims to develop and sustain individual practitioner, team and organisational change capability by facilitating access to and exploration of change methods, standards, case studies and good practices.

## About the SIG

The Enabling Change SIG is a highly collaborative SIG, supporting and enabling the change agenda across other SIGs, reaching out to SIG and APM members through the Branches, and participating in change related discussions across APM.

We have a growing collection of reference material on our website, and will be publishing an introductory guide to change management in 2017.



Martin Taylor  
APM Enabling Change SIG chair

We have a balanced focus on internal and external activities, establishing and developing partnerships with other relevant organisations and groups in order to ensure that we are at the forefront of thought leadership on change-specific topics.

We foster "Change Practitioner Groups": communities of senior change practitioners in public and private sectors, academics and authors who wish to share their knowledge and experience, explore and address challenges and opportunities for enhancing the change capability of their organisations, teams and of individuals.

We also conduct innovative research to support our work and generally advance the body of knowledge relating to enabling change.

#### FURTHER INFORMATION

The Enabling Change SIG website contains a growing collection of reference material. At the time of writing this collection includes:

- a common vocabulary or glossary of change related terminology;
- headings to represent different change methodologies or capabilities;
- a library of professional knowledge / reference sources;
- a change management press and publications reference library;
- a collection of case studies;
- a descriptive list of change methodologies;
- change management professional horizons - existing routes and potential learning gaps into the Change Management profession.

This list and its contents is continuously updated so that readers are advised to refer back to the online collection on a regular basis.

Our hard-copy Introduction to Change Management is due to be published in 2017.

# APM Governance Specific Interest Group

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## Governance

Governance refers to the set of policies, regulations, functions, processes, procedures, responsibilities and relationships that define the establishment, management and control of projects, programmes and portfolios.

*APM Body of Knowledge, 6th edition, section 1.1*

## Overview

Project, programme and portfolio management as P3M is a well-established discipline that is vital to the success of many businesses and government organisations. Much research has shown that good governance is the single most important factor in change/project success.

In recent years the importance of sound and transparent corporate governance has led to the development of guidance and regulations to enhance organisational success.

Yet despite this progress less attention has been paid to the interface between corporate governance and project management – after all project management is the discipline used to implement an organisation's strategic portfolio of change/projects.

Enhanced governance leads to greater success at project, programme and portfolio level. It is important to note that there is a difference between governance of individual programmes/projects and governance of project management across the enterprise.

The former concerns how a specific programme/project is governed (the responsibility of the project sponsor) and the latter concerns how the project management capability of the organisation is governed as a whole - and the responsibility of the organisation's main board.

The core components of the governance of project management cover an appropriate mindset plus four other areas; portfolio direction (doing the right projects to support the strategic objectives), project sponsorship (ensuring an effective link between the organisation's senior executive body and the management of each project), project



Martin Samphire  
APM Governance SIG chair

management capability (ensuring in all key roles appropriate skills and experience are developed, enhanced and deployed – and an appropriate culture and ethical standards are in place) and disclosure and reporting (ensuring open and transparent sharing of information).

## About the SIG

The SIG was established in 2003. The stated purpose of the SIG is to:

- be the UK focus for those interested in the governance of change/project management;
- advance the understanding of governance of project management;
- contribute towards the development of good practice in the governance of change/project management;
- influence national and international standard making authorities to improve their impact on the governance of project management;
- influence those responsible for the governance of project management to improve their practices;
- develop its members as ambassadors and exemplars of excellent governance of project management.

The SIG has been extremely active and has published a series of well received guides (see below), and is also actively reaching out to board/senior executives of organisations, for example IOD, IIRC, as well as the APM membership, to influence them to adopt better governance practices.

### FURTHER INFORMATION

- *Directing Change – A Guide to Governance of Project Management*, Association for Project Management, being revised for re-issue in 2017
- *Co-Directing Change – A Guide to the Governance of Multi-Owned Projects*, Association for Project Management, re-issued in 2016
- *Sponsoring Change – A Guide to the Governance Aspects of Project Sponsorship*, Association for Project Management, being revised for re-issue in 2017
- *Directing Agile Change - A Guide to the Governance of Agile Projects and Enterprises*, – Association for Project Management, being issued during 2016

# APM Knowledge Specific Interest Group

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## Knowledge

A body of understanding and skills that is constructed by people and increased through interaction with other people and with information.

*Knowledge management – a guide, Standards Australia AS 5037–2005*

## Communities of practice

Groups of people who share a concern or passion for an aspect of P3 management and develop expertise through regular interaction.

*APM Body of Knowledge, 6th edition, section 2.2.1*

## Learning and development

Learning and development encompass the continual improvement of competence at all levels of an organisation.

*APM Body of Knowledge, 6th edition, section 2.2.4*

## Overview

Knowledge is the most valuable of an organisation's intangible assets.

Projects, programmes, portfolios and organisations all bring people together so that their collective knowledge can be accessed, combined and transformed.

Knowledge is also central to the concept of a profession. There are many perspectives on the characteristics of a profession – and knowledge features in all of them.

Managing knowledge effectively to improve outcomes and organisational learning requires a holistic, cross-functional approach that optimises the use of knowledge. It means that ideas, experience and insights are used within and between projects, organisations and professions to improve performance. Because knowledge is intangible, it can't be managed directly. We can create documents, processes and ways of doing things that represent our knowledge and make it easier to share, but managing our deeper knowledge (such as experience and insights) has to include managing knowledge workers, connecting people and providing an environment and tools that support the



Francisco Javier Romero Rojo,  
APM Knowledge SIG chair

creation, sharing and use of knowledge.

There is no one-size-fits-all recipe for managing knowledge effectively. It all depends on what you want to achieve, the people you work with, the environment you're working in – and you!

## About the SIG

The Knowledge SIG's vision is 'a world in which all project professionals create, share and use knowledge effectively'.

We work towards this by focusing on two strategic activity streams:

1. Building a community to help project professionals understand how to create, share and use knowledge in project environments.
2. Contributing to APM strategy and initiatives to create a joined up approach to knowledge issues.

Our SIG events are interactive and we build in plenty of time for networking and informal knowledge-sharing. We produce short whiteboard animation videos from our Courageous Conversations to make key messages accessible to a wide audience. Our KM in Projects Community has a dedicated online space for interaction and peer-to-peer learning between members.

K SIG committee members contribute knowledge about knowledge to UK and international publications including the P3O® Manual and PMBOK® Guide 6th edition. We also represent APM on BSI and ISO Groups developing a standard on *Knowledge Management Systems*.

If you want to improve the success of projects and project management by focusing on knowledge issues, you can benefit from joining the SIG and the SIG can benefit from your membership.

### FURTHER INFORMATION

- APM Knowledge SIG Courageous Conversations (Playlist on APM YouTube Channel)
- Standards Australia (2005) *Knowledge Management - A Guide*
- Newell, S., Robertson, M., Scarbrough, H. and Swan, J., (2009) *Managing Knowledge Work and Innovation*, Palgrave Macmillan
- Empson, L., Hinings, R., Muzio, D. and Broschak, J. eds., (2015) *The Oxford Handbook of Professional Service Firms*, Oxford University Press

# APM People Specific Interest Group

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#apmpeople

## People

Interpersonal skills are the means by which people relate to, and interact with, other people.

*APM Body of Knowledge, 6th edition, section 2.1*

## Overview

There is a growing realisation that delivering successful projects is about much more than process. Projects are delivered through people, working effectively as a team, engaging stakeholders and being inspired by top class project leaders. Projects are, to quote former APM president Dr Martin Barnes CBE, "much more to do with the interaction of people, clients and stakeholders and the integration of these aspects". To make significant progress towards achieving APM's vision of a world where 'all projects succeed', the project management profession needs to develop its knowledge, skills and competences in people areas. Project managers need to be able to understand the context and culture in which they work and be able to adopt appropriate behavioural and leadership styles.

A successful project manager will communicate effectively, engaging the client, stakeholders and team, and will be able to provide clear vision, leadership and inspiration.

The project manager must take responsibility for the human resource management aspects of a project, facilitating learning and development both of the project team and in the wider organisation. The increasingly complex world in which we deliver our projects demands a broader level of understanding and competence – from an understanding of ethics and values to the use of tools and techniques such as coaching and mentoring.

## About the SIG

The SIG has a vision of 'Inspired and Inspiring Project Managers' and a mission to raise awareness, inspire thinking and influence opinion around people and project management.

Our primary objectives are to:

- Promote the inclusion of people aspects of project management.
- Research and promote tools and techniques.





Russel Jamieson,  
APM People SIG chair

- Provide support for project leaders and teams.
- Provide support for performance improvement.

We plan to achieve these by:

- building our reputation as a centre of excellence for people aspects of P3M delivery;
- communications and publications using appropriate media including:
  - contributing to the APM Body of Knowledge;
  - SIG-specific guides (print and media);
  - increasing use of social media;
  - engaging with other SIGs and branches, the wider PM community and other 'like-minded' bodies and organisations outside the APM;
  - presentations, workshops and an annual conference;
- proposing, conducting and encouraging research into people aspects of projects

#### FURTHER INFORMATION

- Coleman, S. and MacNicol, D. (2015) *Project Leadership (3rd edition)*
- Pilkington, A. (2013) *Communicating Projects: An End to End Guide to Planning, Implementing and Evaluating Effective Communication*
- APM (2012) *APM Body of Knowledge 6th edition*, Association for Project Management
- APM (2010) *The Lens Collective: A Guide to Seeing Different Perspectives in Project Management*, Association for Project Management
- Knight, S. (2009) *NLP At Work: The Essence of Excellence (3rd edition)*
- Baumard, P. (2004) *Tacit Knowledge in Organizations*
- Grenny, J., McMillan, R., Patterson, K. and Switzler, A. (2004) *Crucial Confrontations: Tools for Talking About Broken Promises, Violated Expectations and Bad Behaviour*
- Hopfl, H.J. and Linstead, S. (2002) *The Aesthetics of Organization*

# APM Planning, Monitoring and Control Specific Interest Group

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## Planning

Planning determines what is to be delivered, how much it will cost, when it will be delivered, how it will be delivered and who will carry it out.

*APM Body of Knowledge, 6th edition, section 3.1.5*

## Monitoring

The recording, analysing and reporting of project performance as compared to the plan in order to identify and report deviations.

*APM Body of Knowledge, 5th edition, Glossary*

## Control

Control comprises of tracking performance against agreed plans and taking the corrective action required to meet defined objectives.

*APM Body of Knowledge, 6th edition, section 3.1.2*

## Earned Value

Earned value management is a project control process based on a structured approach to planning, cost collection and performance measurement. It facilitates the integration of project cost and scope, time and cost objectives and the establishment of a baseline plan for performance measurement.

*APM Body of Knowledge, 5th edition, section 3.6*

## About the SIG

The APM Planning, Monitoring and Control (PMC) SIG was formed in 2012. Its founder members came from the former Planning and Earned Value (EV) SIGs, both of which closed in 2013. The current team is formed of Planning and Control experts from across the community, with a common vision to identify best practice and to share it with the membership of APM, and beyond. We continue to assess all sources of material to inform the membership, via our publications, website, blogs, podcasts and newsletters. We have enabled exams at foundation and practitioners levels in Earned Value Management, and



Stephen Jones,  
APM Planning, Monitoring and Control SIG chair

Planning & Control. The SIG prides itself with a can do attitude, providing speakers for APM events, branch evenings, national exhibitions, and other related organisations.

The area of operation is project control, focusing on techniques and processes, as well as interfaces to other subject areas (e.g. Agile, BIM, risk, governance, programme and portfolio management). Beyond the toolset, there is an interest in the behavioural aspects of management and how this affects implementation and leadership within these areas.

#### FURTHER INFORMATION

The PMC SIG has successfully created and published the following books:

- *A Guide to Conducting Integrated Baseline Reviews*, 2016
- *Planning, Scheduling, Monitoring and Control: The Practical Project Management of Time, Cost and Risk*, 2015
- *The Scheduling Maturity Model*, 2012
- *The Earned Value Management Compass*, 2010
- *Introduction to Project Control*, 2010
- *Introduction to Project Planning*, 2008
- *Earned Value Management - APM Guidelines*, APM EV SIG, 2008
- *Interfacing Risk and Earned Value Management*, APM EV SIG, 2008

The PMC SIG has successfully created and published the following white papers:

- *Agile and Earned Value*, 2013
- *Earned Schedule*, APM EV SIG, 2010

The PMC SIG continues to research subjects that inspire future publications:

- Agile Project Management
- A Guide to Estimating
- Operation chopping board, a working title for a series of short guides
- Introduction to Project Controls for Senior Managers
- Building Information Modelling (BIM)
- NEC3 and Earned Value
- BS6079 - a new British Standard for Earned Value

# APM PMO

## Specific Interest Group

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#apmpmo

### PMO

A Project Management Office (PMO) can provide support, expertise and leadership on technical, specialist and administrative aspects of projects as required, including monitoring and reporting services, promoting best practice and defining and operating assurance and governance processes. These functions may also be extended to encompass the needs of a programme or portfolio and are often delivered through a PMO. Depending on a PMO's scope and remit, it may be referred to in different ways, such as project office, project support office (PSO), programme management office, portfolio management office or enterprise project management office (EPMO). The functions it provides will vary significantly depending on the organisation's context and need.

PMOSIG BoK Refresh Working Group

### Overview

The APM PMO SIG provides a forum for PMO professionals to meet and discuss matters of mutual importance and to create knowledge to be shared across the PMO community.

The PMO SIG has been in existence since 2000. Originally a volunteer run group for 10 years, it became part of APM's Specific Interest Group network in 2011. Still run by dedicated volunteers, the PMO SIG hosts conferences, networking events, and shares PMO related information with its members.

The APM PMO SIG aim is to provide a collaborative open forum for PMO practitioners, and anyone with an interest in the role of PMOs, to get together, share ideas, offer support and advice to the PMO community, and to create valuable practice-oriented knowledge, which helps drive the PMO profession forward.



Emma-Ruth Arnaz-Pemberton,  
APM PMO SIG chair

The SIG aims to do this by:

- facilitating collaborative learning that fully engages the membership and help them grow their PMO skills and competencies;
- reaching out to other disciplines that collaborate routinely with PMOs to create value;
- providing an open source of unbiased advice and guidance to those who can benefit from putting PMO practice to work;
- having a bias towards action, understanding the latest thinking, and quickly digest it into ways that can be shared as digestible knowledge with those we seek to help.

To achieve these objectives, the SIG works with a team of knowledgeable and enthusiastic PMO professionals, which is currently structured around three key areas for the SIG:

- research: so that members are provided with the latest thinking in the field and expand the frontiers of PMO knowledge;
- events: so that members can access exciting conferences with relevant topics, networking opportunities, and other events of interest to the PMO profession;
- marketing: so that members are up to date with the SIG's activities.

#### FURTHER INFORMATION

- OGC - Office of Government Commerce (2008) *Portfolio, Programme and Project Offices*
- Aubry, M., Hobbs, B. and Thuillier, D. (2008) *Organisational Project Management: An Historic Approach to the Study of PMOs*, International Journal of Project Management
- Taylor, P. (2011) *Leading Successful PMOs*

# APM Portfolio Management Specific Interest Group

## CONTACT

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## Portfolio Management

Portfolio management is the selection, prioritisation and control of an organisation's projects and programmes in line with its strategic objectives and capacity to deliver. The goal is to balance change initiatives and business-as-usual while optimising return on investment.

*APM Body of Knowledge, 6th edition, section 1.1.3*

## Overview

Portfolio management ensures that organisations and functions invest money and resources in the 'right' projects and programmes in the context of their strategic objectives. It considers the constraints of opportunity, risk, resource availability, affordability, customer impact and the organisation's capacity to absorb change.

Portfolio management ensures projects and programmes are managed at a collective level, through effective governance, engagement of key stakeholders, adherence to key processes, and the optimisation of limited resources and dependencies. This includes the initiation, prioritisation, reporting, review, modification and discontinuation of projects and programmes.

Through portfolio management, lessons learned should be captured to inform the development of more efficient and effective management of the portfolio. This helps not only to deliver more from less but also to focus on the production of value, however that is defined, by taking action where expected benefits may be threatened or eroded.

The overall result is that delivery of the portfolio is sustainable and aligned to an organisation's strategy and objectives. Portfolio management engages and involves key stakeholders from across the business with a focus on informed decision-making based on timely management information through the organisation's governance processes.

## About the SIG

The aims of the SIG are to:

- promote awareness of portfolio management (PfM) practices;



Stephen Parrett  
APM Portfolio Management SIG chair

- provide an active forum to share experiences, ideas, tools, techniques and challenges;
- encourage cross-profession collaboration (within the world of strategic organisational change management, programme management and project management, both inside and outside APM);
- contribute to the development of best practice (including primary research into PfM through surveying stakeholders and secondary research through review of existing PfM documentation);

**...and so help organisations achieve their corporate strategy or strategic intent.**

The PfM SIG vision is to be recognised across public and private sector organisations, by senior business executives and by existing/aspiring PfM and PPM practitioners, as the professional source of expertise and knowledge for PfM practices, guidance and information and the place to come for informed debate on current/emerging topics of interest.

To help fulfil the SIG's aims, activities focus on 5 themes:

- developing new PfM knowledge (through conference presentations, thought-leadership reports & research);
- disseminating PfM knowledge (by improving access to SIG resources, publishing PfM articles and survey analysis);
- engaging SIG members (by providing conferences, other events and opportunities to participate in activities);
- engaging with the CxO community (to spread awareness of what PfM can do to help deliver strategic objectives);
- working with APM (in collaborating with other SIGs & Branches where interests coincide and to further APM's vision).

#### FURTHER INFORMATION

- *Axelos (2011) Management of Portfolios*

# APM Programme Management Specific Interest Group

## CONTACT

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#apmprog

## Programme Management

Programme management is the co-ordinated management of projects and change management activities to achieve beneficial change.

*APM Body of Knowledge, 6th edition, section 1.1.2*

## Overview

Programme management is focused on the delivery of change within an organisation or environment. The transition from projects delivering outputs to embedding new working practices as business as usual, requires a planned and systematic approach necessitating leadership, drive and commitment.

Programme management evolved during the 1990s as the scale and complexity of change increased. It was also recognised by the UK Government following a number of high profile project failures. This led to the publication of Managing Successful Programmes (MSP) as a framework for programme delivery in the public sector.

In 2011 UK Government established the Major Projects Authority (MPA) to improve project performance for the tax payer across the Government Major Projects Portfolio (GMPP). The SIG works closely with MPA, and other bodies, such as the Public Accounts Committee, to learn from the success, and mistakes, of others.

Programme management is now widely acknowledged as the best means for delivering transformational change within organisations across many sectors and industries. However, it is also acknowledged that whilst programme management is common sense, it is often not common practice.





Dr. Ed Wallington,  
APM Programme Management SIG chair

## About the SIG

The APM Programme Management SIG was established more than 20 years ago.

Our vision is: 'To be recognised internationally as the leading group for programme management, supporting a world in which all projects succeed.'

In line with APM regulations the ProgM mission is:

'To provide a forum for effective learning and development that promotes the science, discipline, tools and techniques of programme management.'

ProgM SIG has 3,500 members. Many of them are experienced practitioners who share a passion for learning and improving programme delivery. We work in partnership with the public and private sectors, academic institutions, and many other organisations.

Our members coach, facilitate and speak on programme management topics at conferences and events, thereby sharing knowledge, experience and good practice. ProgM SIG is digitally-savvy and particularly active in writing blogs, participating in online-forums and using social media.

APM ProgM SIG is open to new ideas; always listening to, and learning from, others. We welcome contributions from all members of the community of practice.

### FURTHER INFORMATION

- Lock, D. and Wagner, R. (2016) *The Gower Handbook of Project Management*
- APM (2016) *APM Introduction to Programme Management*, Association for Project Management
- Thiry, M. (2010) *Program Management*
- OGC - Office of Government Commerce (2011) *Managing Successful Programmes*
- Rayner, P. and Reiss, G. (2013) *Portfolio and Programme Management Demystified*

# APM Risk Specific Interest Group

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## Risk Management

Risk management is a process that allows individual risk events and overall risk to be understood and managed proactively, optimising success by minimising threats and maximising opportunities.

*APM Body of Knowledge, 6th edition, section 3.5*

## Overview

Any decision made in a project environment is based on personal experience and will, inevitably, be biased to some extent. The risk management process attempts to minimise the effects of bias and increase the chance of success through a structured process of evaluating all available options for achieving project objectives, opportunities for improvements and identifying threat reduction actions.

The key principles of risk management as outlined in the *APM Project Risk Analysis and Management (PRAM)* are:

- initiate: set scope, objectives and context for the risk management process;
- identify: enable risk events to be identified;
- assess: understand the impact of identified risk events on project objectives and prioritise for response planning;
- plan: develop a plan to respond to the prioritised risks;
- manage/implement responses: ensure timely and cost effective action is taken;
- manage the process: review all principles for effectiveness and apply lessons learned for continuous improvement.

Benefits of risk management include:

- better informed plans, schedule and budgets;
- increasing the likelihood of a project adhering to its schedule, budget and quality;
- improved corporate experience and general communication;
- developing a common understanding of a project's objectives and improved team perspective.



Kenneth Evans,  
APM Risk SIG chair

## About the SIG

The Risk SIG's objectives are:

- to enable effective management of risk;
- to provide a forum for sharing experience and knowledge;
- to promote best practice in development of guides;
- to establish specific qualification standards for APM qualifications;
- to facilitate the training and development of risk practitioners;
- to promote links with other recognised professional bodies;
- to provide a forum for sharing latest tools and techniques;
- to provide an opportunity to network with people from similar/different roles/positions.

### FURTHER INFORMATION

A number of books have been written on risk management, including;

- APM (2004) *Project Risk Analysis and Management (PRAM) Guide (2nd edition)*, Association for Project Management
- APM (2008) *Interfacing Risk and Earned Value*, Association for Project Management
- APM (2008) *Prioritising Project Risks - A Short Guide to Useful Techniques*, Association for Project Management
- OGC - Office of Government Commerce (2002) *Management of Risk: Guidance for Practitioners*
- BSI (2000) *Project Management: Guide to the Management of Business Related Project Risk*
- The Institute of Risk Management ([their.org.uk](http://their.org.uk))

# APM Systems Thinking Specific Interest Group

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## Systems Thinking

Systems Thinking is a discipline for seeing wholes. It is a framework for seeing interrelationships rather than things, for seeing patterns rather than static 'snapshots'. Systems Thinking is a discipline for seeing the 'structures' that underlie complex situations.

*Peter Senge, The Fifth Discipline: The Art and Practice of the Learning Organisation*

## Overview

Systems thinking is an approach to problem solving which takes into account the overall system as well as its individual parts with the express aim of:

- capturing the right requirements, ensuring a system addresses the right problem and the right need, considering all stakeholder requirements;
- understanding the hierarchy and boundary of a system;
- building in system resilience, robustness and flexibility;
- understanding emergent behaviours and properties of a system both positive and negative;
- avoiding development of unintended consequences;
- defining, understanding and managing the interdependencies of the whole system and across its boundaries;
- help understanding of complicated, complex and chaotic problems.

Increasingly complex change initiatives face a multitude of factors and influences that will typically conspire in unexpected ways to challenge the ability to reach a successful conclusion. A project (or programme or portfolio) represents a change delivery system of interrelated elements (people, processes, environments, technology etc) attempting to create new products, ways of working or social changes within wider environmental, political or socio-economic ecosystems. The complex linkages and relationships between all of these different aspects can be addressed through the holistic perspective provided by the disciplines and approaches within systems thinking.

## About the SIG

The SIG has emerged from a Joint Working Group (JWG), established in 2013 between APM and the UK Chapter of the International Council for Systems



Michael Emes,  
APM Systems Thinking SIG co-chair



Doug Cowper,  
APM Systems Thinking SIG co-chair

Engineering (INCOSE UK). The JWG set out to foster and encourage better integration between project management and systems engineering, drawing on industrial and academic expertise from across the two professional bodies. The Systems Thinking SIG is a natural development of the JWG whose aim is now:

"to promote systems thinking as a methodology to improve delivery of complex change initiatives"

The Systems Thinking SIG will continue the strong relationship with INCOSE UK, supporting (and supported by) members of both communities. Specifically the SIG aims to:

- develop the Project Management BoK for Systems Thinking with particular emphasis on good practice and guidance to enable P3M and Systems Engineering to work efficiently and effectively in the delivery of complex projects;
- introduce systems thinking as a recognised competency for project managers;
- promote systems thinking as a methodology in a broad range of change initiatives and help organisations deliver more effective outcomes with fewer resources;
- provide an active forum for the community of project management and systems thinking professionals to debate and share experiences, ideas, tools and techniques.

The SIG has a strong agenda in continuing the development of both guidance material and deeper research in line with its aim, and in reaching out across the other SIGs and the wider APM membership to help foster the links and relationships that lie at the heart of systems thinking.

#### FURTHER INFORMATION

The APM website for the Joint Working Group has links to various guidance, articles, blogs and conference papers related to systems thinking in the P3M context. In addition the following sources can provide additional material:

- Meadows, D. (2008) *Thinking in Systems: A Primer*
- O'Connor, J. and McDermott, I. (1998) *The Art of Systems Thinking*
- Senge, P. (Revised edition 2010) *The Fifth Discipline: The Art and Practice of the Learning Organisation*
- Sherwood, D. (2002) *Seeing the Forest for the Trees: A Manager's Guide to Applying Systems Thinking*

# APM Value Management Specific Interest Group

## CONTACT

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## Value Management

Value management is a structured approach to defining what value means to the organisation. It is a framework that allows needs, problems or opportunities to be defined and then enables review of whether these can be improved to determine the optimal approach and solution.

*APM Body of Knowledge, 6th edition, glossary*

## Overview

'Value management' has grown on from an original problem solving concept to a more detailed process in the 'management of value' (MoV). Our SIG committee's interest is in promoting the idea of managing projects *for value*. This means promoting the processes and an understanding of what the fundamentals are that make the difference. Not all projects can invest the time for a full MoV study, but all can adopt the principles of putting value added outcomes highest on the project's agenda. It is our contention that this is most important to ensure project success.

Value is a subjective concept with different people applying different criteria to assess whether they are getting good value (OGC 2010). Value management is about maximising value for money in line with programme and project objectives and key stakeholder requirements. This is done by establishing a consensus about the project objectives and how the project team will achieve them.

The process can be applied strategically (value management) or in detailed design (value engineering).

The value management process is based on function – what things do rather than what they are. This allows the identification of exactly what is required to achieve the project or programme benefits before considering ways in which to achieve those benefits. Value management also encourages the use of creative techniques in order to generate better ideas for achieving objectives.



John Heathcote,  
APM Value Management SIG chair

Value management has three key principles:

- a continuous awareness of value for the project by establishing, monitoring and controlling measures or estimates of value;
- a focus on project objectives and targets before seeking solutions;
- a focus on the purpose (or function) of the project (or subject) providing the key to maximising innovation and outcomes.

Value management provides a sound basis of choice for programme and project managers and decision makers.

Products and services can be improved for stakeholders by understanding and prioritising their needs. This leads to an enhanced understanding of the project's goals and enhanced competitiveness through technical and management innovation.

## About the SIG

The Value Management SIG works to:

- develop an understanding of value management principles and processes;
- demonstrate the benefits of value management;
- provide databases of value management information and links to other interested groups and value management organisations;
- be a leader in its field.

### FURTHER INFORMATION

- Institute of Value Management ([ivm.org.uk](http://ivm.org.uk)).
- OGC (2010) Management of Value, The Stationery Office, Norwich.
- British Standards Institution (2000) BS EN 12973:2000 Value Management, European Committee for Standardisation (CEN) Technical Committee CEN/TC 279, BSI London.

# APM Women in Project Management Specific Interest Group

## CONTACT

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[#apmwipm](https://twitter.com/apmwipmsig)

## Women in Project Management

Project management relies on good leadership and team working which can be enhanced by promoting individual strengths. Much has been said about the potential for improvements in organisational practices to be found in examining the differences in management styles between men and women, whilst little has been done to develop organisational processes needed to realise this potential. The future relies on changes in working practices, involving both men and women.

*APM Body of Knowledge, 6th edition, section 2.1.7 and 2.2.1*

## Overview

APM Women in Project Management (WiPM) SIG addresses the development and promotion of women working in project management environments and works to maximise the availability of expertise in the project management profession. We actively promote investment in gender diversity to ensure that all project managers have the potential to develop a highly rewarding career, supporting both men and women in their efforts to maintain a balance between the many demands imposed on them whilst striving to retain their own identity.

Our mission is to:

### Develop a powerful profile

We are active members of the APM and wider project management community and represent the voice of women.

### Promote a no-barrier culture

We encourage all project managers to succeed in their career by providing expertise and resources to facilitate career progression.





Maura Launchbury,  
APM Women in Project Management SIG chair

### Engage with and respond to project professionals

We listen to the voices of our members and tailor our work to their feedback, providing regular occasions to interact through continuing professional development events, webinars and networking opportunities.

### Build a collaborative community

We grow dynamic networks with our members and links with like-minded organisations, sharing best practice in project management and professionalism.

## About the SIG

WiPM was founded in 1993 as a forum for women to develop their skills and to network and continues to support the project management community through the following initiatives:

- a varied programme of events and networking opportunities, including the annual APM National Conference for Women in Project Management, one of our flagship conferences for APM;
- active social media community and discussions through LinkedIn and Twitter;
- building links with other professional communities and women's networks;
- support group for those aspiring to RPP and FAPM;
- an information database and profiles of project managers that demonstrate the diversity of those in the WiPM community.

### FURTHER INFORMATION

- Women in Science, Technology and Engineering (WISE) Campaign for advice on best practice
- Women on Boards Davies Review Annual report 2015
- Women in Science, Technology and Engineering Campaign (WISE) for advice on best practice
- Test your own Unconscious Bias with the Implicit Association Test at Harvard
- [Women in Project Management video](#)

# APM SIG Publications

[apm.org.uk/publications](http://apm.org.uk/publications)

## APM publications

The following APM titles, written by the APM SIG community, are available to purchase.

- *A Guide to Integrated Assurance*
- *A Guide to Conducting Integrated Baseline Reviews (IBR)*
- *APM Body of Knowledge, 6th edition*
- *APM: Introduction to Programme Management 2nd edition*
- *Co-Directing Change: A Guide to the Governance of Multi-owned Projects*
- *Directing Agile Change*
- *Directing Change: A Guide to Governance of Project Management*
- *Earned Value Management: APM Guidelines*
- *Earned Value Management Handbook*
- *Governance of Co-owned Projects*
- *Interfacing Risk and Earned Value Management*
- *Introduction to Programme Management*
- *Introduction to Project Control*
- *Introduction to Project Planning*
- *Models to Improve the Management of Projects*
- *Planning, Scheduling, Monitoring and Control*
- *Prioritising Project Risks*
- *Project Risk Analysis and Management Guide*
- *Sponsoring Change*
- *The Earned Value Management Compass*
- *The Lens Collective: A Guide to Seeing Different Perspectives in Project Management*
- *The Scheduling Maturity Model*

## Other APM Publications

[apm.org.uk/publications](http://apm.org.uk/publications)

- *The APM Project Management Qualification Study Guide*
- *Starting Out in Project Management*
- *The APM Project Fundamentals Qualification Study Guide*

### Partnership publishing

- *Praxis Framework*
- *NEC3 Professional Services Short Contract*
- *NEC3 Professional Services Short Contract Guidance Notes*

### Free downloads

- *APM Salary and Market Trends Survey*
- *APM Conditions for Project Success report*
- *Emerging Trends: Introduction to Gamification*
- *Emerging Trends: Coaching in the Project Environment*
- *Practical Adoption of Agile Methodologies*
- *Innovation in Projects*
- A range of various white papers, case studies and community web briefings
- *Measures for Assuring Projects toolkit*

# Volunteer Opportunities

[apm.org.uk/volunteers](http://apm.org.uk/volunteers)

As a leading modern professional body, APM relies on the expertise and commitment of its volunteer community for the development and promotion of project and programme management. This includes the effective delivery of many wide ranging activities for the benefit of individuals, organisations and society including events, publications and product development.

In support of this activity, APM has published a [community charter](#) that sets out the key principles by which all those involved with APM work and collaborate together towards achieving our shared vision of a world in which all projects succeed.



APM currently holds the Investing in Volunteers Quality Standard. Achieving this quality accreditation publicly demonstrates APM's commitment to volunteering and effective volunteer management.

There are a number of regular opportunities to be involved with voluntary work with APM:

- APM branches;
- Specific Interest Groups (SIGs);
- Schools engagement - Inspiring the future;
- Schools engagement - STEMNET.

## Volunteer feedback

"I decided to become a volunteer for APM so as to contribute to the direction that APM is taking, and to support the translation of project management theory and best practice." - Dr. Ed Wallington.

"It's a great chance to network with fellow professionals, offer advice and indeed seek information for yourself" - Anthony Dobbie.

"I've a passion for sharing knowledge and helping people grow personally and professionally. Volunteering has allowed me to meet a wide range of people to share my knowledge with!"- Katie Ball.





# Notes

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