Management of Portfolios (MoP™)
Foundation/Practitioner Certificate Courses

Duration 2 days Foundation / 2 days Pactitioner

Anyone involved in planning, delivering and contributing to, programmes and projects and organisational strategy from inception to delivery will benefit from this course.

Many organisations focus on the performance of individual projects, or at best on the performance of individual programmes and projects, rather than on the performance of the sum-total of all their change initiatives ie, the portfolio. This makes it difficult to properly evaluate the cumulative effect that change initiatives will have on the organisation and to coordinate the implementation of change so as to safeguard the integrity of business operations.

To address this, the Office of Government Commerce (OGC) has recently published the MoP Guide (Management of Portfolios) to accompany the already existing guidance for Programme Management (MSP) and Project Management (PRINCE2).

Portfolio Management is concerned with:
• ensuring that the programmes and projects undertaken are the right ones in the context of the organisation's strategic objectives
• successful delivery at a collective level
• that benefits realisation is maximised
• that lessons learned are identified and applied in the future.

The MoP™ Foundation Certificate Course
The objective of the Foundation course is to enable delegates to understand the key principles and practices in successful Portfolio Management as described in the official OGC MoP Guide.

The course comprises a 2-day balanced blend of presentations, individual activities and discussion sessions. Delegates should also set aside some time for self-study and exercises during the evenings.

Participants are provided with an annotated hard copy of the slides together with any exercises, examples and templates discussed or developed during the workshop, as well as a copy of the official MoP™ Guide and a mock foundation exam paper.

The MoP™ Practitioner Certificate Course
The objective of the practitioner course is to develop an in-depth understanding of MoP and how it can be applied in practice. The course builds on the knowledge gained during the Foundation program and improve the delegate's ability to analyse portfolio data, documents and roles in different business situations. By the end of the course delegates will have a sufficient understanding on how to tailor and apply MoP.

Who Should Attend
Anyone involved in planning, delivering and contributing to, programmes and projects and organisational strategy from inception to delivery. This includes:
• Members of Management Boards and Directors of Change
• Senior Responsible Owners (SROs)
• Portfolio, Programme, Project, Business Change and Benefits Managers
• Business Relationship Managers, Customer Relationship Managers, Service Delivery Managers
• Enterprise Programme Office or Project Support Office managers and officers
• Business Case writers and Project appraisers
• Those in other functions/departments with a role in delivering strategic objectives

Course Contents

1. **Running the Business vs Changing the Business**
Gaining an understanding of the relationships between day-to-day business operations, performance management and managing a portfolio of change, and of how the quality of change impacts the quality of business outcomes and the benefits of change.

2. **MoP Structure, Principles, Practices and Benefits**
A first look at the structure, principles, practices of Portfolio Management, the business problems it is designed to address and the benefits that can be derived from its implementation.

3. **Strategic and Organisational Context**
The business activities that Portfolio Management needs to be integrated with, and how to ensure that the change portfolio is aligned with the organisation's strategy and strategic plans.

4. **Portfolio Definition Cycle**
The activities required to understand, prioritise, balance and plan a change portfolio that is aligned with the organisation's strategic plans.

5. **Portfolio Delivery Cycle**
The activities required to ensure that the change portfolio is delivered in accordance with expectations, that the benefits are realized and that Business-as-Usual is safeguarded.

6. **Roles & Responsibilities**
The different roles involved in governing and managing the portfolio, with their responsibilities.

7. **Implementing and Sustaining Portfolio Management**
Different approaches available to implement MoP within an organisation, starting from an assessment of the pre-existing situation.

8. **The Portfolio Management Framework**
The central repository containing a description of the agreed portfolio management practices adopted by the organisation and its governance arrangements.

9. **Energised Change Culture**
An investigation of what it takes for an organisation to be willing and capable of undergoing change.

Practitioner Course
The course is scenario based, focusing on the application of portfolio management in accordance to the MoP best practice guidance. Review and revision sessions are included throughout the training. A Practitioner sample exam paper is also used during the training to identify and address knowledge gaps.

Exam
The MoP Foundation Certificate Exam takes place on the last afternoon: multiple choice format; 50 questions per paper; 25 marks required to pass (50%); 40 minutes duration; closed book.

The MoP Practitioner Certificate Exam takes place on the last afternoon of the course: objective testing format; 4 questions per paper with 20 marks available per question - all question items will be worth 1 mark, making the total number of marks available per paper 80; 40+ marks needed to pass (50%); duration 2½ hours; open book paper (MoP guide only).