
The integration of action research and project management in the implementation of two strategic work based learning projects (strategic asset management and carbon reduction) in a large institution; resulting in a contribution to strategic goals, and an increased understanding of institutional portfolios and their interdependencies.

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Abstract

This Work Based Learning (WBL) doctoral thesis, describes a study undertaken by the Author as a mature student with significant knowledge and background in Property and Facilities Management, performing in a senior executive role as the Director of Facilities at the University of Southern Queensland (USQ) in Australia.

At the outset I was seeking an appropriate opportunity to re-engage with structured learning that would deliver not just personal knowledge, growth and development but also add value to the workplace by creating opportunities to apply the academic dimensions in an operational setting and leveraging off those synergies, thereby enhancing divisional performance and project outcomes. That opportunity presented as the Doctor of Professional Studies (DPST) program at USQ.

The DPST program required the identification of suitable workplace projects as a platform for undertaking the program. As a result of my early analysis I had identified professional, personal and institutional contexts influencing the mapping of my doctoral journey. The congruence of these contexts produced a 'common ground' and it was there that I identified two significant, strategic issues at the University that required addressing. The literature associated with contemporary Facilities Management indicated that these remain fundamental issues for the FM body of practice and face all FM practitioners to a greater or lesser extent.

The work based projects undertaken were; the development of an institutional Strategic Asset Management capability to enable the alignment of the institution's property portfolio with the strategic goals and operational needs of the institution (SAM Project), and; the management and reduction of the institution's carbon emissions in support of increasing sustainability drivers and responsibilities (Carbon Reduction Project).

The alignment of these two strategically significant projects with the WBL opportunity proved to be beneficial and productive, resulting in significant knowledge and capability development for the participants and the organisation. The learning from these projects has

touched staff and students at every level of the organisation and indeed extended beyond the boundaries of the organisation in the case of the Carbon Reduction Project.

The study was undertaken using action research methodology to provide the overarching academic environment, with formal project management methodology applied as a way of governing and managing project implementation across the multiple dimensions of the projects. The integration of these approaches resulted in a series of academic papers at the start and conclusion of each project and the use of regular project reporting (reflecting both operational and academic progress) and the maintenance of a Learning Journal as part of my own reflective learning development. The various dimensions of both projects are fully described, as are the key outcomes and learning.

This thesis provides a case study of each project and further makes a contribution to professional practice and the body of knowledge through: the implementation frameworks developed and adopted through the study; through the outcomes and knowledge developed through the project implementations including a discussion of 'portfolio mindedness', through the integration of action research and project management methodologies, through my reflections and learning as a researcher practitioner seeking to affect significant change in a large institution, and; as an exponent of WBL undertaking a personal learning journey.

The key artefacts from this study have been included within the thesis as embedded content. In this way they reflect the chronology of the work and also provide substantive content for the thesis. The term 'artefact centric' has been used to describe this form of thesis and is one of the generally accepted formats for a WBL thesis.

As a result of the SAM and Carbon Projects, the USQ has gained a significant understanding of the footprint of its physical portfolio, and the effect of that portfolio on the organisation's bottom line. Further it has adopted a carbon reduction strategy that will achieve 64% reductions against the 2009 carbon emissions baseline (if fully implemented).

As a result of the work (delivering the projects within an operational environment enhanced by the academic dimensions of WBL and Action Research) I and the members of the Campus Services team, being the primary actors within this study, have gained significant knowledge

and understanding, beyond that which might have been attained from a traditional operational delivery model, including increased reflective practice competency. Part of that knowledge and learning relates to the concept of portfolio mindedness, and the importance of such a holistic approach to the appreciation and management of institutional portfolios.

In summary, the thesis describes a portfolio-focused approach to carbon emissions and strategic asset management, linking the two portfolios as one representation of the institutional footprint, and then expanding that concept to acknowledge the relationships which exist between institutional portfolios, and the consequent benefit for institutions and practitioners in adopting a portfolio minded approach in order to maximise the contribution to the organisation's strategic goals.

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Figure Descriptions

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Artefact Descriptions

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25	<i>Academic Reporting</i>	Carbon	4	278
26	<i>Media Release</i>	Carbon	4	285
27	<i>Project Closure Report</i>	Carbon	4	291
28	<i>Vice Chancellor's Committee Reduction Strategy Paper</i>	Carbon	4	300
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Certification of Dissertation

I certify that the ideas, experimental work, results, analyses, software and conclusions reported in this dissertation are entirely my own effort, except where otherwise acknowledged. I also certify that the work is original and has not been previously submitted for any other award, except where otherwise acknowledged.

Signature of Candidate

Date:

ENDORSEMENT

Signature of Supervisor

Date: