



Sergey Bushuyev, Andrii Ivko
Kyiv national university of construction and architecture, Kyiv, Ukraine

ORCID: <https://orcid.org/0000-0002-7815-8129> – S. Bushuyev

<https://orcid.org/0000-0002-3388-8355> – A. Ivko

✉ sbushuyev@gmail.com

IMPLEMENTATION MODELS OF SYNCRETIC METHODOLOGY IN THE ORGANIZATIONAL CONTEXT OF PROJECT-ORIENTED ORGANIZATIONS

Abstract. The article is devoted to the analysis of syncretic methodology implementation models in the organizational context of project-oriented organizations participating in infrastructure restoration projects. The models and methods of the leading standards that can be used in the researched type of projects, as well as relevant scientific studies, were analyzed. Four classes of models for introducing syncretic methodology into the activity of a project-oriented organization have been identified: models for training staff of a project-oriented organization; models for the selection of stellarator projects for their implementation as anchors in the implementation of syncretic project management methodology; implementation models of the syncretic methodology implementation project against the background of the implementation of the pilot project-stellarator; models of formation of the syncretic methodology knowledge base based on the results of the implementation of the stellarator project. Each given class of models is analyzed, a set of models is proposed for each such class. It is proposed to use trainings, consulting, coaching, training on real cases, self-study during the implementation of the stellarator project as training models. A proposed list of study topics is presented. Six recommended models and methods of selecting stellarator projects have been identified - expert evaluation method, creative methods, selection according to the dominant criterion, selection according to several criteria (relevant criteria are proposed), collegial decision of the authorized body, involvement of a consultant. Business process description models and calendar-network models are proposed among the implementation models of the syncretic methodology implementation project against the background of the implementation of the pilot project-stellarator. A high-level model of two-project coordinated implementation is proposed, given and described. Four models of syncretic methodology knowledge base formation are described, including: personalized data storage, relational database, Big Data models and methods, artificial intelligence models and methods. A generalized SWOT analysis of the proposed approach was also conducted. Prospects for further research in the chosen direction are outlined.

Keywords – project and program management, project-oriented organizations, syncretic methodology, self-managed teams, methodology implementation project, stellarator project

С. Д. Бушуйєв, А. В. Івко

Київський національний університет будівництва і архітектури, Київ, Україна

МОДЕЛІ РЕАЛІЗАЦІЇ СИНКРЕТИЧНОЇ МЕТОДОЛОГІЇ В ОРГАНІЗАЦІЙНОМУ КОНТЕКСТІ ПРОЄКТНО-ОРИЄНТОВАНИХ ОРГАНІЗАЦІЙ

Анотація. Стаття присвячена аналізу моделей реалізації синкретичної методології в організаційному контексті проектно-орієнтованих організацій, що беруть участь в проєктах відновлення інфраструктури. Проаналізовано моделі і методи провідних стандартів, що можуть бути використані в досліджуваному типі проєктів, а також відповідні наукові дослідження. Ідентифіковано чотири класи моделей впровадження синкретичної методології в діяльність проектно-орієнтованої організації: моделі навчання персоналу проектно-орієнтованої організації; моделі вибору проєктів-стелараторів для їх реалізації як якорів при впровадженні синкретичної методології управління проєктами; моделі реалізації проєкту впровадження синкретичної методології на фоні впровадження пілотного проєкту-стеларатора; моделі формування бази знань синкретичної методології за результатами впровадження проєкту-стеларатора. Кожен наведений клас моделей проаналізовано, запропоновано множину моделей для кожного такого класу. У якості моделей навчання запропоновано використовувати тренінги, консалтинг, коучинг, навчання на реальних кейсах, самонавчання під час реалізації проєкту-стеларатора. Представлено пропонований перелік тем навчання. Ідентифіковано шість рекомендованих моделей та методів вибору проєктів-стелараторів – метод експертного оцінювання, креативні методи, вибір за

панівним критерієм, вибір за декількома критеріями (відповідні критерії запропоновано), колегіальне рішення уповноваженого органу, залучення консультанта. Серед моделей реалізації проекту впровадження синкретичної методології на фоні впровадження пілотного проекту-стеларатора запропоновано моделі опису бізнес-процесів та календарно-сітьові моделі. Запропоновано, наведено і описано верхньорівневу модель двопроектного узгодженого впровадження. Описано чотири моделі формування бази знань синкретичної методології, серед яких: персоналізоване сховище даних, реляційна база даних, моделі і методи Big Data, моделі і методи штучного інтелекту. Також було проведено узагальнений SWOT аналіз запропонованого підходу. Окреслено перспективи подальших досліджень у обраному напрямку.

Ключові слова: управління проектами та програмами, проектно-орієнтовані організації, синкретична методологія, самокеровані команди, проект впровадження методології, проект-стеларатор

Introduction. Project-oriented organizations participating in infrastructure restoration projects of Ukraine work in difficult conditions of the war caused by the aggression of the Russian Federation. Such projects are important for the state and will provide a cumulative positive effect on improving the country's economy [1]. Therefore, it is practically valuable to use such a management system in restoration projects, which would ensure high efficiency of their implementation, and increase the speed of execution while meeting other project limitations regarding the budget, the quality of the project product, the achievement of values by stakeholders, etc. Creating a management methodology that would become the basis for such a management system is an urgent scientific task.

The authors propose a syncretic methodology for use in infrastructure restoration projects. One of its key features is to enable each recovery project participant (or each recovery project team within the portfolio of relevant projects) to be guided by a management system built on a separate, proprietary methodology specific to the participating organization.

At the same time, aspects of the organization of the implementation of the syncretic project management methodology, and the organizational context of the corresponding project have not yet been sufficiently researched and not sufficiently covered in scientific sources. Therefore, the topic of this study can be considered relevant.

Literary review. The organizational context of project management was explored for the first time in leading industry standards and methodologies. The most recent editions of such standards and methodologies offer further development of the issue of the organizational basis for the implementation and development of project management in project-oriented organizations. Thus, the leading industry standard PMBOK [2] of the American Institute PMI offers a large number of organizational structures with different degrees of development of project activity – matrix (weak, balanced, strong), project, composite, virtual, simple, project office, etc. Regarding approaches to organizational transformation, the standard proposes a new process (which may later develop into a new branch of knowledge) – tailoring. The purpose of tailoring is to

match (adapt) the approaches of the implemented methodology to the conditions of the organization in which it's going to be implemented. This process is important in view of the subject of our research and will be developed further. The portfolio management standard from the same PMI institute [3] for the implementation of higher-level project management (portfolio management as an aggregated management of the organization's projects) offers higher-level organizational structures – committees and boards, in particular, a strategic committee, a change implementation committee, etc. Part of such a structure can also be borrowed and adapted to the portfolio management system of infrastructure restoration projects. The British standard PRINCE2 [4] provides for the division of the project management system into two levels – governance (upper level) and management (lower level), even when managing individual projects, which corresponds to portfolio management and is its downward projection. A somewhat different concept is offered by the Japanese P2M standard, which provides for the unification of all project activities of the organization (even projects defined by different customers) around a single mission. At the same time, the set of projects becomes a program (rather than a portfolio) and requires portfolio management models. In the organizational structure of management, there is a level of program management, which is higher than portfolio and project management. Such a program management office includes not only program managers, but also program's projects support specialists - analysts, IT specialists, etc. The Agile methodology [6], which has recently been actively used in project management, at the beginning of its use offered simplified structures for small teams of 10-12 people. However, given its development and scaling, Agile can now be used in large hierarchical teams during the execution of complex large-scale projects. The structure of roles in Agile is somewhat different from the classical approach, but it can be mixed with traditional methodology [7] and use analogs of roles. In this way, the use of Agile elements is also appropriate for use in the researched type of projects. As well as a syncretic methodology specially created for such projects, was developed by the authors [8]. This methodology assumes that

individual projects included in the portfolio of restoration projects can be guided by their own project management methodology as well as parts of one large project within the framework of a large-scale restoration project management system. This feature of the syncretic methodology is important for restoration projects, as they involve and will involve different participants from different countries and, accordingly, different management cultures, which are embodied in the inherent methodology. Syncretic methodology ensures effective coexistence of such methodologies within the project portfolio management system. However, such a methodology must be effectively implemented in an adequate organizational structure, for which appropriate models and methods must be developed. In the above studies, this a scientific problem was not solved.

Let's consider research on organizational structures in project management and on the organizational development of relevant models, considering the possibility of their application in the organizational context of self-managed organizations that implement recovery projects using syncretic methodology. Research [9] studied the problem of effective coexistence of the project and operational subsystems of a project-oriented organization, analyzed existing project management monitoring systems in modern organizations, and proposed an effective management model intending to harmonize the business processes of these two subsystems. The most inherent organizational structures for the implementation of project management, in parallel with operational ones, are matrix ones. Studies [10] analyzed matrix structures and investigated their relationship with project success criteria, such as the quality of project interactions, cooperation in the project, and support in solving problems between members of the project team. The proposed model reveals the influence of the characteristics of the matrix structure on the factors of the final success and efficiency of the project. The connection between the successful implementation of the project and the type of organizational structure (matrix is proposed) and the leadership of the team members was noted, and the concept of "leaders of success" was introduced. In general, the influence of the type of organizational structure on the effectiveness of project activities has been studied by many researchers, in particular, in studies regarding the complexity of management [11], analysis of the best organizational conditions for increasing project efficiency [12], and models for improving teamwork to achieve project success [13, 14]. Related studies touch on an interesting aspect of organizational development, which is related to the technological maturity of organizations in the field of project management [15] by Harold Kerzner's PMMM (Project Management Maturity Model).

Models suitable for use in the researched project were also presented in an interesting work on hybrid management (hybrid management methodology) of projects [16]. The combination of different methodologies, approaches, and models is generally inherent in modern project management in general, and its organizational context in particular. This was confirmed, in particular, in numerous analyzed cases of real project management [17,18], based on which new theoretical models, methods, approaches and even methodologies later appeared. An important prerequisite for improving the organizational structure of a project-oriented organization is the development of knowledge on project management and project portfolios, as well as the filling of relevant knowledge bases [19], and therefore the application of such models is relevant for the development of the management system of the studied type of projects. In other studies, the complex impact of an effective organizational structure on the effectiveness of project management was considered [20]. In particular, the key factors influencing the organizational structure were considered, and it was concluded that an adequate organizational structure can improve coordination, communication, and decision-making in project teams. A mismatch between organizational structure and project needs can hinder progress and create obstacles that are difficult to overcome. Within the syncretic project management methodology proposed by the authors, its organizational aspect was also considered [21]. However, in general, it is worth noting that in the considered sources, the model of the implementation of syncretic methodology in the organizational context of project-oriented organizations is not sufficiently researched, which determines the relevance of research in this direction.

Research methods. In this study, general scientific methods of analysis and synthesis, systems theory and a systematic approach for the decomposition of the general task into subtasks, process management theory for the development of a generalized project implementation process, project management theory for the synthesis of proposed models and methods of introducing syncretic methodology into the restoration project management system were used. Methods of syncretic management for the development of syncretic approaches in the context of the studied projects were used. The method of SWOT analysis was used for the general characteristics of the conducted research.

Research results. The organizational context of syncretic methodology implementation is determined by organizational structure models operating in a project-oriented organization, as well as models and methods that will be used in the implementation of the corresponding implementation project. The

organizational structure model, the list of team roles, and their characteristics (including role requirements) were proposed by the authors earlier [21]. In the further development of research, we will propose four classes of models for the implementation of syncretic methodology in the activities of a project-oriented organization:

- staff training models of a project-oriented organization;
- models for the selection of stellarator projects for their implementation as anchors in the implementation of syncretic project management methodology;
- implementation models of the syncretic methodology implementation project against the background of the implementation of the pilot project-stellarator;
- models of the formation of the syncretic methodology knowledge background based on the results of the implementation of the stellarator project.

Let's consider in more detail each class, we will offer a set of models for each class.

Models of staff training of a project-oriented organization. Implementation of syncretic project management methodology in the activities of a project-oriented organization should be preceded by training. Such training can take place in different

forms, using different types of training models. The list of proposed training models is given in Table. 1.

Also, an important element of this training is the list of topics on which it should be conducted. The list should be based both on the features of the syncretic methodology itself and on the features of the context of the project-oriented organization and its environment. Among the typical topics, the following can be offered:

- syncretic methodology essence, structure, models and methods implementation;
- tailoring of syncretic methodology to the conditions of project-oriented organizations;
- comparison of syncretic methodology with others: classical methodologies, flexible methodologies, hybrid methodologies;
- models and methods of self-management, and their use in syncretic project management methodology;
- the relationship between operational and project management, ensuring their effective synergistic coexistence;
- stellarator projects, their goals, structure, applicable models and methods, the life cycle of implementation, and connection with syncretic methodology.

Table 1. Learning models of syncretic methodology in a project-oriented organization

Table 1.

Learning models of syncretic methodology in a project-oriented organization

№	Learning model	Content of the model and its differences	Main participants
1	Training	Engaging a trainer with knowledge and skills in using syncretic management, studying theory and application examples, performing exercises to consolidate the material	Project team, stakeholders
2	Consulting	Engaging a consultant (individual or consulting company) to provide advice on a specific topic related to the application of syncretic methodology, based on the relevant contract	The project team, top management of the project-oriented organization, partners, stakeholders
3	Coaching	Involvement of a coach - a specialist who will accompany the syncretic methodology implementation project (or the implementation of the stellarator project), provide appropriate consultations, and participate in decision-making support for the project	Project team, partners
4	Training on real cases	Involvement of a specialist in the field of syncretic management, who demonstrates the models and methods of such management, while illustrating their application on real cases of past implemented projects. No theory study is provided.	The project team, top management of the project-oriented organization, partners, stakeholders
5	Self-study during the implementation of the stellarator project	The team's training occurs as part of the implementation of the stellarator project, and it is important to accumulate a knowledge base to improve the implementation of subsequent projects	Project team

Models for the selection of stellarator projects for their implementation as anchors in the implementation of syncretic project management methodology. It is worth reminding that the stellarator project was defined by the authors as a dual project that combines a regular project, which is usually carried out by a project-oriented organization within the main direction of its activity, and a development project aimed at increasing the level of institutional capacity of a project-oriented organization [22]. We will offer a set of basic models and methods of selecting such projects for project-oriented organizations that use a syncretic project management methodology:

- method of expert assessment and models of processing expert assessments (ranking, concordance, etc.);

- creative technologies for generating solutions in project management – brainstorming, the Delphi method, etc.;

- selection according to the dominant criterion; examples of the criteria can be: the shortest implementation time, the minimum (or vice versa, the maximum, depending on the strategy) number of participants involved in the project, etc.;

- selection based on several criteria; among such criteria, in addition (to those indicated above), the following can be used: the cost of project implementation, the degree of digitization in the project, the level of the project's influence on the growth of the culture of project syncretic management, the priority of the components of stellarator project, etc.;

- a collegial decision of an authorized body (subdivision), for example, the Project Management Office;

- engagement of a consultant to determine the stellarator project.

The selection process, which will be based on the above models and methods, should be fixed organizationally. It is necessary to determine the list of members of the decision-making group, the powers of each person and the group as a whole. There should also be a formalized process of interaction between the group and the top management of the project-oriented organization, which will include the exchange of data and solutions.

Implementation models of the syncretic methodology implementation project against the

backdrop of the implementation of the pilot project-stellarator. Among the areas of modeling of project implementation processes, it is worth paying attention to business process models. We will leave the discussion about belonging to business processes of the full list of organizations' activities outside the scope of our study. Instead, let's pay attention to the standardization of the description of the relevant activity. The large number of standards (notations) for the description of business processes allows us to highlight their distinguishing features: the presence of hierarchy, description of individual steps of the process, the interconnectedness of steps, artifacts of each step (responsible, documents, input and output data, implementation time, etc.).

In the context of the application of notations for the description of business processes, an example of an upper-level model of a two-project coordinated implementation of a syncretic methodology implementation project and a stellarator project proposed for managing a portfolio of infrastructure restoration projects in Ukraine is shown in Fig. 1.

In this model, the parallel implementation of two projects (the syncretic methodology implementation project and the stellarator project) occurs jointly and congruently, and three processes of management interaction are provided: 1) at the beginning of the project, when determining the information necessary for the start – the data of the methodology implementation project and the data of the stellarator project form a common dataset; this dataset is checked for consistency, the common dataset is cleaned and agreed; 2) during the project in the form of constant harmonized monitoring – information on the implementation of the stellarator project affects information for the syncretic methodology implementation project and vice versa; such cross-effects should be included in the planning of subsequent tasks of both projects; 3) at the finish of the project, to obtain a synergistic effect when implementing the results of the joint project into the activities of the project-oriented organization – data on the results of both projects should supplement the knowledge base of the project-oriented organization, in particular, such a base should reflect the interconnected parameters of both projects, and determine their impact on the synergistic effect of projects implementation for the development of the project-oriented organization.

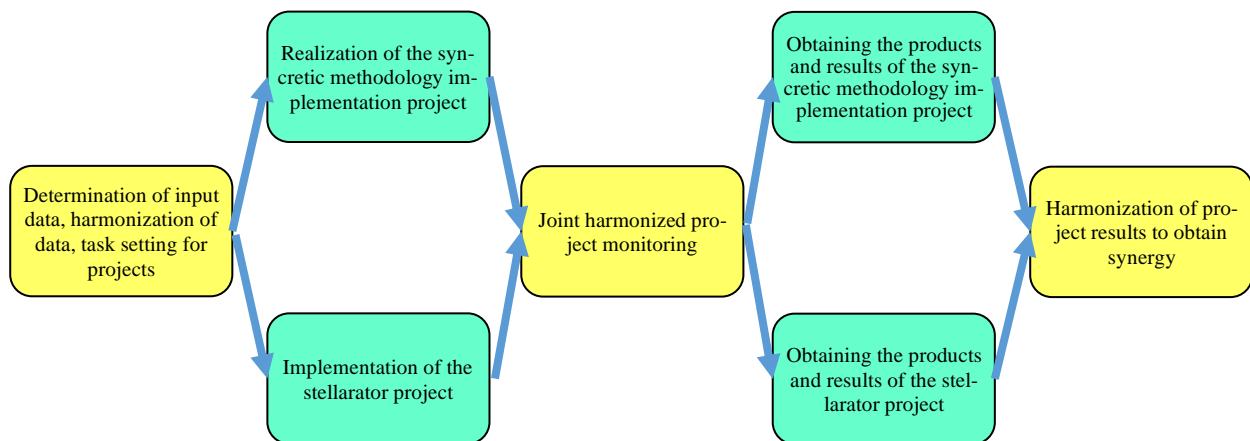


Fig. 1. Upper-level model of two-project coordinated implementation

Besides models of business processes, it is also worth considering models of calendar-network planning to describe the studied set of projects. However, due to the need for excessive detailing of such models, we will refer their consideration to the directions of further research in the selected context.

Models of formation of the syncretic methodology knowledge background based on the results of the implementation of the stellarator project. During the implementation of the syncretic methodology project together with the stellarator project, important artifacts (ordinary artifacts undergo changes) of the project activity will appear, which should be stored, accumulated, and analyzed for further use in the future project activities of the project-oriented organization. For this purpose, the knowledge background must be accumulated, among which the following models should be recommended:

- recording of incidents and artifacts of syncretic methodology and stellarator projects in a personalized data warehouse created by a project-oriented company independently, with the processing of such data with the help of industry specialists and an expert environment (minimum automation of data processing);
- recording of incidents and artifacts of syncretic methodology and stellarator projects in the relational database with further processing and visualization of information;
- the use of Big Data models and methods, and relevant information tools for the accumulation,

interpretation, visualization of data and the formulation of hypotheses regarding the dynamics of data and dependencies between them;

- the use of Machine Learning models and methods, neural networks, and artificial intelligence models for data processing regarding the implementation of syncretic methodology implementation projects together with the stellarator project.

In general, for project-oriented organizations implementing infrastructure restoration projects, it is worth proposing the creation of a syncretic management system, which would be characterized (in the context of the triad "IT-rules-people") by a list of relevant roles, which were described [21], integrated into a strong matrix organizational structure using self-management models of project teams; application of syncretic methodology and its formalization in the form of regulations, business processes and document templates; information technology of information exchange implementation and its accumulation (using models and methods of artificial intelligence) during the implementation of the joint project of the introduction of syncretic methodology and the stellarator project.

Discussion of research results. Within the framework of the conducted research, a SWOT analysis of their results was carried out. It was presented in the first form – with the identification of strengths, weaknesses, opportunities, and threats of the proposed approach (Table 2).

Table 2.

Results of the SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> - Systematic approach to the implementation of syncretic methodology; - Determination of a sufficient set of models and methods for effective two-project coordinated implementation; - Adaptability and scalability of the proposed approach. 	<ul style="list-style-type: none"> - Insufficient level of formalization of the proposed integrated approach as a whole; - Insufficient level of practical approval of the approach, especially (but not only) in terms of applying elements of artificial intelligence; - Considerable complexity of implementation of models and methods within the proposed approach.
Opportunities	Threats
<ul style="list-style-type: none"> - An opportunity for project-oriented organizations to increase their reputation due to the successful implementation of projects, and accordingly, to expand the potential of competitiveness, and conclude new contracts for project management; - The possibility of improving project management maturity and team competencies and processes in the project-oriented organization; - The possibility of obtaining a sustainable synergistic effect from the implementation of the proposed approach and the growth of skills of participants in the project activity (both from the project and the operational part of the management system). 	<ul style="list-style-type: none"> - The threat of delay in the implementation of current projects due to the diversion of resources of the project-oriented organization to the proposed development project; - The threat of increasing force majeure in the external environment (escalation of war, etc.), as a result of which development projects (in particular, the project of implementing syncretic methodology) will lose relevance and be terminated; - The threat of resistance of the middle management (operational subsystem) of a project-oriented organization to the implementation of innovative approaches.

Among the main advantages of the given approach, it is worth defining its systematicity, complexity, and innovativeness, the possibility of obtaining a synergistic effect from the interaction within the current projects and the implementation of the development project, the completeness of models and methods, as well as the flexibility and scalability of the proposed approach.

In general, based on the results of the SWOT analysis, it can be concluded that the implementation proposed models of the syncretic methodology in the organizational context of project-oriented organizations are potentially effective and practically valuable.

Conclusions. The implementation of wartime projects, in particular reconstruction projects, sets higher requirements for their efficiency, productivity, and effectiveness. Thus, the management system of such projects should be based on the appropriate innovative methodology. As such methodology, it is proposed to use the syncretic project management methodology developed by the authors. However, the organizational aspect of the implementation of the mentioned methodology has not been sufficiently studied. This determines the relevance and practical value of this study.

In this article, the organizational context of project-oriented organizations is examined and appropriate models for implementing a syncretic methodology are proposed. In particular, the models and methods of leading standards that can be used in the researched type of projects, as well as relevant scientific research, were analyzed. Four classes of

models for introducing syncretic methodology into the activity of a project-oriented organization have been identified: models for training staff of a project-oriented organization; models for the selection of stellarator projects for their implementation as anchors in the implementation of syncretic project management methodology; models for implementing a syncretic methodology project against the background of a pilot stellarator project; models of formation of the syncretic methodology knowledge background based on the results of the implementation of the stellarator project. Each given class of models is analyzed, and a set of models is proposed for each class. In particular, it is proposed to use training, consulting, coaching, training on real cases, and self-study during the implementation of the stellarator project as training models. A proposed list of study topics is presented. Six recommended models and methods for selecting stellarator projects have been identified. Business process description models and calendar-network models are proposed among the implementation models of the syncretic methodology implementation project against the background of the implementation of the stellarator pilot project. An upper-level model of two-project coordinated implementation is proposed, presented and described. Four models of syncretic methodology knowledge base formation are also described. The results of a generalized SWOT analysis of the proposed approach are also given.

In general, proposed set of models and methods will allow to systematization the activities of project-

oriented organizations involved in the implementation of infrastructure restoration projects, to receive increased benefits from the use of syncretic project management methodology by such organizations. The successful implementation of syncretic methodology projects in the project management system of organizations involved in infrastructure restoration projects will contribute to increasing the efficiency of such systems and, in general, to a quick, efficient, productive, and effective recovery of the economy of Ukraine.

As vectors of further research in the chosen direction, the following can be identified: expansion of the fields of implementation of syncretic methodology together with stellarator projects, a more detailed analysis of the implementation of stellarator projects, research and finding the best models of organizational structures for the implementation of similar projects, innovative research in the specified direction for further improvement of management systems of project-oriented organizations participating in infrastructure restoration projects.

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