University of Gdańsk

Subject card

Subject name and code	Investment and Project Management, PG_00154903						
Field of study	Finance and Accounting						
Date of commencement of studies	October 2024		Academic year of realisation of subject		2026/2027		
Education level	Bachelor's studies		Subject group		Obligatory subject group in the field of study Subject group related to scientific research in the field of study		
Mode of study	part-time studies		Mode of delivery		at the university		
Year of study	3		Language of instruction		Polish		
Semester of study	6		ECTS credits		6.0		
Learning profile	academic		Assessment form		credit		
Conducting unit	Faculty of Management -> Rector						
Name and surname of lecturer (lecturers)	Subject supervisor		dr Beata Zackiewicz-Brunke				
	Teachers						
Lesson types	Lesson type	Lecture	Tutorial	Laboratory	Project	Seminar	SUM
	Number of study hours	20.0	12.0	12.0	0.0	0.0	44
	E-learning hours included: 0.0						
Learning activity and number of study hours	Learning activity	Participation in didactic classes included in study plan		Participation in consultation hours	Self-study		SUM
	Number of study hours	44		30.0	76.0		150
Subject objectives	The aim of the course is to provide students with knowledge, techniques, and tools for project management and to familiarize them with the issues of investment management from both theoretical and practical perspectives, with an emphasis on understanding the process of preparing an investment project and assessing the financial efficiency of investments. Working in project teams, students will gain practical experience in project management, with a particular focus on the project planning stage, and will prepare a financial model and conduct a profitability analysis as part of preliminary feasibility studies for a sample investment project.						

Learning outcomes	Course outcome	Subject outcome	Method of verification
	[FiRL3_K02] Cooperation: - can harmoniously interact and work in a group, taking on different roles in it - is able to agree with the group on goals and division of tasks - is open-minded and respects the differences of other team members.	Cooperation in the field of investment and project management: - can harmoniously interact and work in a group, taking on different roles in it - is able to agree with the group on goals and division of tasks - is open-minded and respects the differences of other team members.	[SK2] presentation/project/paper/ report [SK8] observation of student's independent or team work
	[FiRL3_U06] The student uses the acquired knowledge to resolve dilemmas arising in professional work. The student is able to solve advanced problems in finance and accounting that arise in business practice: - compare financial instruments, - evaluate the profitability of the enterprise, - evaluate the financial position of the organization against the industry, - propose appropriate solutions to tax problems, - identify and select appropriate risk management methods, - construct an enterprise insurance protection program, - select sources of financing for the organization, - construct an appropriate accounting/control system.	The student uses the acquired knowledge to resolve dilemmas arising in professional work. The student is able to solve advanced problems in the field of investment and project management in business practice:	[SU2] presentation/project/paper/ report [SU3] text preparation/written work
	[FiRL3_K06] Creativity: - thinks creatively, is able to go beyond the usual patterns, - is able to think and act in an entrepreneurial manner, - is able to adapt flexibly to the requirements of the environment.	Creativity in the field of investment and project management: - thinks creatively, is able to go beyond the usual patterns, - is able to think and act in an entrepreneurial manner, - is able to adapt flexibly to the requirements of the environment.	[SK2] presentation/project/paper/ report [SK3] text preparation/written work
	[FiRL3_W08] The student knows the principles of evaluating projects in the field of finance (profitability of investment projects, assessment of the financial situation of the organization, risk assessment, threat of bankruptcy).	The student knows the principles of evaluating projects in the field of finance (profitability of investment projects, assessment of the financial situation of the organization, risk assessment, threat of bankruptcy) in the field of investment and project management	[SW2] presentation/project/paper/ report [SW3] text preparation/written work
	[FiRL3_K05] Responsibility: - meets deadlines - is able to properly identify priorities for the implementation of the task set by him - consistently strives to achieve the set goal - is able to work systematically and independently - observes the rules and norms of social coexistence.	Responsibility in the field of investment and project management:: - meets deadlines - is able to properly identify priorities for the implementation of the task set by him - consistently strives to achieve the set goal - is able to work systematically and independently - observes the rules and norms of social coexistence.	[SK2] presentation/project/paper/ report [SK3] text preparation/written work
	[FiRL3_W09] The student knows the principles of formation and economic functioning of commercial and public sector organizations, their forms, phases of development, as well as the financial conditions determining their value and economic success.	The student knows the principles of formation and economic functioning of commercial and public sector organizations, their forms, phases of development, as well as the financial conditions determining their value and economic success in the field of investment and project management	[SW2] presentation/project/paper/ report [SW3] text preparation/written work

	Course outcome	Subject outcome	Method of verification
	[FiRL3_K01] Self-development: - understands the need for development and lifelong learning - is able to supplement and improve the acquired knowledge and skills - knows his strengths and weaknesses, sets ambitious goals to the best of his ability - knows how to accept failure and admit mistakes.	Self-development in the field of investment and project management: - understands the need for development and lifelong learning - is able to supplement and improve the acquired knowledge and skills - knows his strengths and weaknesses, sets ambitious goals to the best of his ability - knows how to accept failure and admit mistakes.	[SK1] oral statement/conversation/ discussion [SK2] presentation/project/paper/ report
	[FiRL3_K03] Communication: - is able to present his view, issue in a way that others can understand - boldly (but thoughtfully) expresses his opinion, is not afraid to ask questions - is able to culturally participate in discussions - is able to give constructive criticism.	Communication in the field of investment and project management: - is able to present his view, issue in a way that others can understand - boldly (but thoughtfully) expresses his opinion, is not afraid to ask questions - is able to culturally participate in discussions - is able to give constructive criticism.	[SK1] oral statement/conversation/ discussion [SK2] presentation/project/paper/ report [SK8] observation of student's independent or team work
	[FiRL3_K04] Integrity: - abides by business ethics - respects the law - is objective, is able to recognize conflicts of interest - correctly identifies and resolves dilemmas related to the practice of the profession.	Integrity in the field of investment and project management: - abides by business ethics - respects the law - is objective, is able to recognize conflicts of interest - correctly identifies and resolves dilemmas related to the practice of the profession.	[SK1] oral statement/conversation/ discussion [SK2] presentation/project/paper/ report
	[FiRL3_U03] The student can properly analyse the causes, course and effects of specific processes and phenomena in finance and accounting, using advanced theories and relevant social sciences methods. Can identify stakeholders of processes and phenomena from the disciplines of management and quality sciences and economics and finance.	The student can properly analyse the causes, course and effects of specific processes and phenomena in finance and accounting, using advanced theories and relevant social sciences methods. Can identify stakeholders of processes and phenomena from the disciplines of management and quality sciences and finance in the field of investment and project management	[SU2] presentation/project/paper/ report [SU3] text preparation/written work
	[FiRL3_U07] The student analyses the proposed solutions to problems in the disciplines of management and quality sciences and economics and finance, especially in the field of finance and accounting, and is able to present their advantages and disadvantages and propose appropriate solutions in this regard.	The student analyses the proposed solutions to problems in the disciplines of management and quality sciences and economics and finance, especially in the field of finance and accounting, and is able to present their advantages and disadvantages and propose appropriate solutions regarding the management of investments and projects	[SU2] presentation/project/paper/ report [SU3] text preparation/written work

Subject contents	**[SCOPA: PROJECT MANAGEMENT]** Lecture topics (15h) 1. Introduction to project management part 1 2. Introduction to project management part 2 3. Project management methodologies (PMI, IPMA, PRINCE) 4. Aspects of project planning and execution, the Deming cycle 5. Waterfall, agile and hybrid methodologies in information systems project management 6. Waterfall methodology for information systems project management 7. Agile methodology for information systems project management the case of SCRUM 8. Basic tools for managing information systems project in the execution phase Exercise issues (15h) 1. Project: Initiation and planning. Defining the goals and scope of the project. Project chart. 2. Project: Initiating and planning. Stakeholder analysis 3. Project: Initiation and planning. Project Work Breakdown Structure (WBS) 4. Project: Initiating and planning. Responsibility Assignment Matrix (RAM) 5. Selected project planning techniques. Gantt. 6. Selected project planning techniques. The critical path method in project planning CPM- PDM basic assumptions

	The project as a network structure Determining the critical path in the project 7. Selected project planning techniques. Time Stocks and Their Role in Project Planning (Total Float/Free Float) Determining the critical path in the project **[SCOPE: INVESTMENT MANAGEMENT]** Lecture topics (15 h) 1. The essence, types, motivation, significance and determinants of investment decisions. 2. Concept, features, classification of investments. Principles of investment management. 3. Types of investment projects, investment project cycle, types and aspects of pre-investment studies. 4. Purpose, content and functions of the feasibility study of the investment project. 5. The problem of assumptions in the project. Rules for preparing a financial model as part of feasibility studies. 6. Principles, types and techniques of profitability calculation of an investment project. 7. Equity and standard approach in the assessment of profitability. 8. Risk in an investment project. Sensitivity analysis. Computer laboratory (15h) 1. An example of an investment feasibility study related to enterprise investments. 2. Development of an investment project strategy. 3. Location analysis and selection. 4. assumptions for the financial model. Data collection for pre-investment studies. 5. Planning for capital expenditures and sources of their financing. 6. Production/service capacity (structure) planning and revenue forecast. 7. Cost forecast.

	8. Forecast of financial statements for the case study. 9. Assessment of the profitability of an investment project for standard (FCFF) and equity (FCFE) approaches, using static and dynamic methods of profitability assessment. 10. Risk assessment of the investment project. Conclusions from the analysis.
Prerequisites and co-requisites	
Assessment methods and criteria	

Subject passing criteria	Passing threshold	Percentage of the final grade
Project	51.0%	30.0%
Written colloquium	51.0%	70.0%

Recommended reading		
	Basic literature	1. Behrens W., Hawranek P.M., Poradnik przygotowania przemysłowych studiów feasibility. Wydawnictwo UNIDO, Warszawa 1993. 2. Nawrocka E., Szczepaniak K., Welzant K., Wojewnik-Filipkowska A.: Inwestycje przedsiębiorstw w niepewnych warunkach rynkowych, CEDEWU, Warszawa 2022; rozdziały: 1, 2 oraz 5. 3. Przewodnik PMBOK, wydanie 7-me, Project Management Institute 4. Rubin K., Scrum. Praktyczny przewodnik po najpopularniejszej metodyce Agile, Helion, 5. Wysocki R., Efektywne zarządzanie projektami, OnePress, Gliwice, wydanie najnowsze lub wcześniejsze.
	Supplementary literature	1. Dziworska K., Decyzje inwestycje przedsiębiorstw. Wydawnictwo Uniwersytetu Gdańskiego, Gdańsk 2000. 2. Krzymowski B., Excel 2003 PL Poradnik dla nieinformatyków, HELP, 2004. 3. Marcinek K. Wprowadzenie do inwestowania. Wydawnictwo Uniwersytetu Ekonomicznego w Katowicach Katowice, 2014.
	eResources addresses	

Example issues/ example questions/ tasks being completed	
Work placement	Not applicable

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