Facilitating Selection and Development:
The Case of the “Accidental Professionals” - Project and Programme Managers

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Abstract
Finding the right people to undertake key projects and programmes is notoriously difficult – mishaps and casualties are part of the folklore of most organisations. Promoting from within can be as haphazard as recruiting externally. Yet, the demand for competent project and programme managers grows as organisations face unprecedented change. Traditional competency and competence models used in selection and development have significant limitations. Research using the phenomenographic method has uncovered different conceptions held by experienced practitioners that shape their understanding and action. These conceptions form a hierarchy in terms of performance, and are the basis of empirically grounded competence frameworks. Such frameworks, based on learned constructs and attitudes of practitioners, offer a more robust and useful approach to selection and development. We report on our applications of the phenomenographic method and highlight the uses, scope and advantages of this approach in informing key decisions and supporting performance improvements and corporate transformations.

Key words
Project and programme managers, competence, competency, phenomenographic method, selection and development

Introduction
A few aspire to it, some choose it, but many drift into it, or, worse, have the role of project manager thrust upon them. The structuring of work into bounded (scope, time, funds) undertakings to be managed in a controlled fashion has generated a boom in projects, and consequent need for project managers. Individuals with skills and competence in a technical discipline or managerial function take on the role often usually without making a planned or considered career choice, and often without adequate development and support – the accidental project manager (Ensworth, 2001). The profusion of projects and the need to implement complex strategic changes in turbulent environments have led to the formation of programmes and emergence of programme management as a discipline, related to but distinct from project management (Pellegrinelli et al. 2010). Experienced project managers have been promoted into, or line managers have been assigned to, programme roles, again often without adequate consideration, development and support - the accidental programme manager. Should we then be surprised at the frequency of project and programme failures?

Unlike many established professions such as engineering, law or accounting, project and programme management do not have well trodden career paths with recognised stages, achievement milestones and indicators of who can and will reach the top of their chosen profession. There are (mainly) post-graduate courses on project management usually attracting those wanting to make the transition, but practitioners who have done a Masters degree or equivalent in Project Management are a small minority. Our experience of working on such Masters programmes is that participants with limited work experience rarely appreciate fully the nature and practice of project and programme management. They may gain a theoretical foundation and generalisable set of processes, frameworks and techniques, but knowing is not the same as doing.

In a similar vein, professional associations, such as the American Project Management Institute’s (PMI) and the UK Association for Project Management (APM), publish bodies of knowledge (PMI, 2008; APM, 2006) and offer accreditations. For many, though, the attainment of a professional qualification is a validation of competence acquired through considerable effort and, in many cases, a few hard knocks. It is a confirmation of
an intention to continue managing projects. The next challenge, though, is that neither competence nor accreditation in project management is a good guide, in itself, to effectiveness as a programme manager (Pellegrinelli 2002, Partington et al. 2005). Competent project managers too often struggle and fail as programme managers, especially when assigned to complex, strategic or transformational programmes. Project management competence appears necessary but not sufficient for success in a programme role. Programme management bodies of knowledge are in their infancy, and accreditations have yet to prove their worth.

In sectors where a move into (and out of) a project management role may be normal - part of an explicit or understood career path, there may be a presumption that demonstrated competence in one role is an indicator of prospective competence in a more advanced role. In the Information Technology (IT)/ Information Systems (IS) sector a common career path seems to be: programmer, systems analyst, team leader, project manager, programme manager. Those who have performed well at a role are nominated or supported for promotion to the next, with its offer of greater rewards, recognition, career progression, prestige, etc. Few organisations refer systematically to rigorous research or established competence frameworks when making appointments or career progression decisions. Even those that have competence or competency frameworks in place rely heavily on managers’ subjective assessments, which are obviously coloured by a multitude of factors.

Organisations apparent willingness to becomes hostages to fortune in the selection and development of competent project and programmes managers is out of keeping with the supposed importance of projects and programmes, and hence their managers, in the effective achievement of key objectives and the realisation of strategic goals. The ‘sink or swim’ approach, adopted perhaps inadvertently by many organisations, is wasteful of individuals’ abilities and corporate resources. To the extent that the individuals involved suffer stress or compromise their prospects, the approach is morally questionable. It also suggests that HR as a management function has little to offer as an improvement on a costly process of trial and error.

The remainder of the paper first discusses the nature and limitations of competency and competence models that underpin prevailing approaches to selection and development. An alternative, phenomenographically based method is reviewed. We proposed that competence frameworks based on the conceptions that shape understanding and action offer a more robust and useful approach to the selection and development of project and programme managers. We draw on extant research and on our extensive work in the field, and use examples and case studies to support and elaborate our arguments.

The Competency/ Competency Confusion

Those responsible for the selection and development of project and programme managers have a number of disparate sources to draw on. A key problem, though, is untangling attributes (sometimes referred to as traits), competency and competence, and deciding what to do with other factors such as values and motivations. Attributes usually refer to innate, or deeply ingrained, characteristics of individuals. Competency usually refers to a particular set of aptitudes, attitudes and/or predispositions deemed important for, or underpinning, the effective performance of a specific role. Competence is usually the minimum standard of performance in a specific role against predetermined criteria – an output-based measure assessed on (objectively) observed/demonstrated behaviour. The terms competency and competence are often used interchangeably, and even more problematically competency frameworks often include elements that many would consider attributes.

In the field of project and programme management, professional bodies and academic researchers offer a range of frameworks and findings. For instance, the Project Management Institute’s (2007) Project Manager Competency Development (PMCD) Framework – Second Edition provides general context for the definition, assessment and development of project manager competency. The framework outlines the key dimensions of project management competency and identifies those competencies that are most likely to impact project manager performance. On the other hand, the Global Alliance for Project Performance Standards (GAPPS) has two competence standards for project managers, reflecting the complexity of the projects to be managed. The premise is that some projects are inherently harder to manage than others: a project manager who is competent to manage an easier, less complex project may not be competent to manage a harder, more complex project. GAPPS is expected to release its Program Manager Standards in 2010. Gadaken’s (1994) study of the characteristics of top-performing project managers in UK and US military acquisition commands identified six competence elements which distinguished the outstanding project managers from their contemporaries: sense of ownership/mission, political awareness, relationship development, strategic influence, interpersonal assessment, and action orientation. Gehring (2007) attempted to apply trait theory to project manager performance, mapping the PMI’s PMDC framework against Myers-Briggs type indicators (MBTI) and sought to predict and test, albeit limited to a small sample, which types would support project management competency. Dainty et al.

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(2005) in studying construction project managers identified 12 core behavioural competencies underpinning effective performance, two of which were the most predictive of effectiveness or superior performance: composure and team leadership. Muller and Turner (2010) profiled the intellectual, managerial and emotional competences of project managers of successful projects, and found that high levels of critical thinking, influence, motivation and conscientiousness in successful managers of all types of projects.

Competency models strive to identify what might lead to superior performance, and may offer some guidance to potential effectiveness in a role. Important caveats should be noted. First, overuse or more of a desirable competency may not lead to better performance – a base level may suffice. Second, one must be wary of reversing causality – that superior performers exhibit certain competencies does not mean that an individual exhibiting those competencies will perform better. Third, competency model seek to distil the distinctive characteristics and behaviours of supposedly superior performers. But the uniqueness and uncertainty associated with any project or programme means that success can be as much luck as judgement, the management of expectations as the delivery of results, or carefully avoiding certain assignments. Moreover, models include attribute-like elements, the elements themselves are typically generic and so are open to wide interpretation and rather subjective application. Traditional skills based competence models, though more robust, are poor for selection, especially for moves into new roles, given their focus on minimum standards and demonstrated performance. Neither type of model addresses processes of development directly: how project and programme managers improve their performance and become able to take on more demanding assignments and roles. Crawford (2003) seeks to bring together attribute-based competency models with performance-based competence models, positing competence as a combination of knowledge, skills, core personality characteristics and demonstrable performance in a professional context. However, the interaction and integration of these elements is achieved is relatively unexplored.

**Learned Behavioural Constructs Understood Through An Interpretive Approach**

Our contention is that the stresses and failures associated with making transitions within and between formal roles suggest that competence development is not strictly incremental, linear or smooth, but marked by a series of step changes. This view is supported by the research of Partington et al. (2005) and Chen and Partington (2006), which are both grounded in an interpretative perspective and use the phenomenographic method (Marton 1981, 199; Sandberg 1994, 2000) to study the project and programme managers’ conceptions of their work. Central to the phenomenographic approach is the understanding and articulating (mapping) of how an individual apprehends, makes sense of and enacts a specific aspect of their world, termed a conception. The methodology is predicated on the fundamental tenet that a person’s competence at work consists of, and is inseparable from, the way they conceptualise that work. For instance, in their study of programme managers, Partington et al. (2005) drew out four qualitatively different, yet internally coherent, conceptions of (project and) programme management work. These conceptions or mental models were set in a hierarchy in terms of performance. Consistent with other work using the method, higher-order conceptions were more holistic, integrative and encompassing than the lower-order conceptions. Individuals holding higher-order conceptions could recognise and appreciate, though not necessarily apply or agree with, lower-order conceptions, but not vice versa. Some of the dimensions of their competence framework are cumulative between levels, usually incorporating other distinct elements or features. Other dimensions have discontinuities.

Phenomenography, first developed within the field of educational psychology to explain why some students are better at learning than others, is essentially a method for describing learned constructs and attitudes, acquired and honed primarily through experience that shape understanding and action. The method provides an understanding of individuals’ current ways of working, and an insight into how individuals, based on their conceptions, would be expected to perform in a different role or different assignment. Competence frameworks based the notion of a hierarchy of conceptual levels and derived through the phenomenographic method are both robust and useful as the basis for selection. Pellegrinelli et al. (2003) describe the use of the Partington et al. (2005) competence framework as the basis of assessment/development centres used by a major UK financial services organisation to identify which programme managers had the competence or potential to handle the major strategic changes mandated by the Group Board.

Subsequent development centres for other organisations have demonstrated the applicability and robustness of the competence framework and the assessment process. For instance, the project engineering division of a major UK company used tailored assessment centres, facilitated by one of the authors, based on the Partington et al. framework. The organisation used the results, along with other factors and judgements, to choose individuals to fill key positions in a transformed organisation. The process identified several individuals, who, despite being relatively junior in terms of the organisational hierarchical, once promoted into key positions...
performed well. A major system consultancy used a comparable approach to select individuals to sponsor on a Masters in Programme and Project Management.

As a way of introducing and testing the suitability of the interpretive perspective to the project management context of a multinational company, one of the authors developed a one-day role awareness workshop. The workshop involved a group of ten individuals representing the three existing formal project management levels (hierarchical positions). The group identified five competence layers, reported here in ascending order of perceived role awareness.

1. **Execution and problem solving.** Efficiently solve problems when they occur.
2. **Planning and management.** Organize activities and human resources to prevent problems and consequently be able to execute efficiently.
3. **Political sensitivity.** Appreciate stakeholders’ expectations in order to plan correctly and to execute efficiently.
4. **Leadership.** Lead team and stakeholders in order to meet their expectations, in order to plan correctly and to execute efficiently.
5. **Strategic awareness.** Set project vision, align project objectives to strategies, lead team and stakeholders to meet their expectations, in order to plan correctly and to execute efficiently.

The role awareness that emerged from the workshop complemented the more traditional skills, behaviours and attitudes used in assessment and development, and deemed applicable to the project management community. Consequently, a project was initiated to redesign the company’s project management competence development process to integrate role awareness elements in all of its steps. The redesign project team, driven by the corporate Project Management Office (PMO), involved a HR representative, two project managers, two project portfolio managers, two line managers, and an external consultant, who acted as a facilitator.

The project (Garagna et al., 2006), which was planned and executed within six months, provided five important deliverables:

1. **Project management role descriptions:** The three project managers’ role descriptions were reviewed to clarify the responsibilities. The differential elements between the three levels was clarified, contributing to the project managers’ awareness of what was required in each role.
2. **Position requirements maps:** The knowledge, skills, and attitudes required to cover each of the three project management positions were also reviewed to fit the new role descriptions.
3. **Role awareness interview:** A specific interview protocol/technique intended to explore and gauge role awareness was developed and integrated into the project managers’ assessment and recruitment process. The interview was designed to replicate the approach used on the original and subsequent role awareness workshops.
4. **Competence and knowledge sharing:** Additional opportunities for the members of the project management community to meet each other were introduced to increase awareness of the role. Beside regular newsletters and PMO website updates, quarterly meetings were established. The ‘PM Network’ meeting has become an important event for sharing information, knowledge, experiences, lessons learned, as well as for discussing subjects of common interest.
5. **Professional development opportunities:** The existing project management training was reviewed and integrated with courses ‘on demand’, to address potential gaps in specific knowledge area. Additionally, project managers are now encouraged to contribute to the company’s best practice improvements efforts by directly participating in PMO driven projects. Coaching is recognised as an integral part of the professional development process. Moreover, active involvement in external events (e.g. international congresses, benchmarking sessions) is now promoted.

**Transitioning between Conceptions**

The existence of coherent, relatively self-contained conceptions, which enable individuals to perform at a level, means that individuals can refine their ways of working without adopting a higher conceptual level. Within a role, or more specifically working on similar projects or programmes, competence development and associated performance improvements tend to be incremental or evolutionary. Transition to another role, or more
specifically successfully managing far more complex or challenging assignments, may demand a higher-order conception and hence a step change in approach.

This discontinuity between conceptual levels provides considerable insight into what can be described as the paradox of success – that excellence in one role, or one type of work, may hinder the acquisition of the conception, and hence thinking and acting, associated with and usually required for the effective performance of the more demanding role, project or programme. The adoption of new modes of behaviours may be stifled by an unwillingness to abandon tried and tested behaviours associated with success in the previous role or work. Individuals can only act based on their conceptions – how they make sense of and respond to the situation (phenomenon) they perceive. This paradox of success is not limited to individuals, but organisations as well: there are many cases of very successful organisations failing to address new circumstances, unable to perceive the changes or too consumed with a sense of infallibility. Traditional development, with its emphasis on knowledge and skills, and attempts to improve performance along the various dimensions of either a competency or competence framework, may not be helpful. In fact, given the existence of step changes and discontinuities in behaviours and attitudes between roles or types of work, development efforts are understood in the prevailing conception may be counter-production. They may ingrain patterns of behaviour and reinforce the view that success is about honing or polishing the existing ways of working.

The notion of learned constructs and attitudes as the basis for competence has at its heart the view that individuals can learn to achieve a higher level of competence. Our experience is that many project and programme managers do transition to a higher conceptual level, and hence are better placed to succeed in more demanding assignments. Acquiring and internalising a higher-order conception requires significant effort – individuals need to confront situations outside their comfort zones, or be shown a new way of seeing. Experiences such as moving to a new organization or different country, or working for different clients or sponsors expectations typically prompt deep reflection and learning. Thus, the ‘sink or swim’ approach can work, but the casualties are high. Our experience is that development processes that stimulate new perspectives and experiences can provide a surer and safer way of helping individuals acquire a new conception. The effectiveness of such development efforts is increased where on-going support is provided to embed a new level of conception, usually in the form of coaching and mentoring, or communities of practice. The competence framework provides a map for exploring higher-order conceptions and so facilitating awareness and informing the direction and nature of transition.

We have worked on many such development initiatives with project and programme managers. For instance, one of us has worked extensively for international Information Systems consultancies helping their project managers and senior technical consultants to move from being technology implementers to becoming business partners. Through the use of targeted inputs and, more important, carefully constructed business simulations (role plays), we fostered an awareness of how they might alter their behaviour to facilitate a new relationship with their clients. We sought to give them a more holistic view of their work, new conceptual lenses and a wider a repertoire of approaches to deal with the complex and politically sensitive situations. Over the course of a week, we initiated the process of making a step change, with a particular focus on understanding business issues and stakeholder agendas, tolerating ambiguity and embracing change. We operate as facilitators and guides helping individuals to learn, rather than instructors providing prescribed techniques and universal truths. We mediate between conceptions: we preparing and leading individual to the realisation of new possibilities in thinking and acting.

This approach has been tested by one of the authors in a mid-sized insurance company over the course of a three years “Project Management Lab”, which involved a group of 30 people in different roles (managers, team leaders and experts) (Garagna 2005). The intent was to create a safe environment (the Lab) where participants could experiment with new approaches on their current projects. A group of 5 team leaders met monthly, facilitated by one of us acting as organisational consultant, to plan the activities for the following period and to measure the progress to date. Between the meetings, the team leaders were implementing the activities in their 5 teams. The focus of the first year was mostly education initiatives and programmes, then the focus shifted gradually towards real projects. A general session was held every four months to ensure community alignment and motivation - senior managers were often asked to attend and contribute as involved participants to these meetings. The project produced a visible cultural change, manifested most vividly by diagrammatic Work Breakdown Structures exhibited in meeting rooms, and the incorporation of project management language and tools in the talk and practices of managers and staff not directly involved in the Lab.

Another, smaller scale example, is the use of coaches to assist the development of a small group of young project managers in a multinational company – accompanying them in the process of learning and building their
competence. A consultant observed project team meetings and gave feedback to the project manager on what had happened during the meeting. The “incidents”, mostly unnoticed by the project manager, were used to raise the awareness of the project manager learner, who had to find his/ her own answers to common project issues. (Typically these issues/ situations were the same as already seen in formal training, but without practical implications for their work, and were neutrally reported by the observer). The improvement actions, proposed and chosen by the project manager, had to be tested in the following project meeting. The progress, in term of project performances indicators, was clearly measurable and formally recognised by senior management.

Common to these learning experiences is the personal involvement of the learner, who is not led in a predefined direction, but is instead supported in inquiring about his/ her own behaviours and their effect on performances in order to find for himself/ herself the most effective direction.

**Conceptual Ceilings**

Some individuals appear more able and willing to make the transition. Research within the phenomenographic tradition, as well as our own extensive experience, indicates that not all practitioners hold higher-order conceptions irrespective of the amount of experience they have. One way of explaining this is through the old adage that 10 years’ experience can be made up of 1 year lived 10 times, or 10 different years. Within a conception, the next projects or programmes is experienced and approached in a similar way. Our work with numerous organisations suggests that in many cases the stimulus and opportunity to learn have not been present, whether in the form of mentoring and role modelling from more senior managers, diversity of assignments, opportunities to observe the best practitioners in action or appropriate development interventions. We have witnessed, and in a few cases calibrated, transitions in individuals and groups.

We tend towards the view that individuals have huge capacities to learn - in terms of the Nature vs Nurture debate, we have great faith in Nurture. We are, though, not blind to the fact that individuals possess unique abilities and predispositions that help or hinder the acquisition and enactment of the highest-order conceptions. Attributes - innate, or deeply ingrained, characteristics of the individuals play a part in determining an individual’s *level of competence*. Our work has led us to the view that attributes, usually associated with competent performance, can lay dormant unless triggered or surfaced by some form of opportunity, experience, reflection or more formal learning process. They are not, in *and of themselves*, sources of competence or superior performance. There is unfulfilled potential in almost all of us. Attributes can facilitate or constrain the learning, honing and enactment of behaviours associated with higher-order competence. For instance, a strong tendency to logical analysis and rational thinking may dull sensitivity to stakeholder’s emotions and tacit concerns in a project or programme context. In certain circumstances, attributes may be limiting factors to the attainment of higher-order conceptions and thus competent performance of certain roles or on certain assignments. For instance, performing effectively as a programme manager may require a degree of innate cognitive capabilities and capacities to handle effectively the complexity, ambiguity and sheer volume of data in a programme environment. We also hold that attributes, to the extent that they are not genetically predetermined and immutable, can be shifted or moulded consciously by learned behaviours. For example, we can consciously work on improving our memories, overcoming pre-dispositions or embracing new attitudes. In the case of attitudes, humans tend to align attitudes to behaviours unconsciously to reduce cognitive dissonance.

Our experience of development centres and of working in consultancy role with project and programme manager is that factors other than attributes are more likely to create an *unwillingness* to embark on moving from one conception to another. Some are comfortable where they are; some have other priorities or commitments; some do not see the benefit of expending the effort.

**In summary**

Qualitatively distinct conceptions, comprising coherent sets of attitudes and behaviours, shape and mediate the understanding, sense-making and action that comprise competent performance. Conceptions are learned rather than innate behaviours, that can be mapped and gauged. In the vast majority of case, individuals can move from one conception to another, though this requires significant effort on their part.

For senior managers and HR professionals a competence framework based on the phenomenographically derived conceptions provides a more grounded, rigorous and integrated approach for the selection and development of project and programme managers than traditional competency and competence frameworks. It improves the chances of appointing the right individual to an important, yet complex and demanding, project or programme. It facilitates retaining and rewarding individuals for doing what they do well, while dissuading
them from trying to take on assignments or roles that are at that particular moment in time beyond their competence level. It avoids the deterministic tendencies of some attribute-laden competency models and the demonstration of some pre-defined minimum performance standards.

The notion that competence in project and programme management consists of, and is inseparable from, the way individuals conceptualise their work has implications for development interventions. For seasoned practitioners especially, learning experiences, reflection and self-awareness should take precedence over imparting codified knowledge and teaching techniques. This notion also prompts greater thought into how individuals might acquire and absorb new insights and awareness and might try out new behaviours without being excessively exposed. Taken-for-granted career path might be revisited to include different roles that could generate useful experiences and reflections and highlight potentially neglected aspects of project and programme work. Perhaps working on an IT helpdesk or in a Project Management Office (PMO), facilitating training and development events, or even taking on a line management roles might, in certain circumstances, facilitate the transition from one conceptual level to another. Identifying and proposing these opportunities for professional development should become a key responsibility of senior managers.

The alternative is to accept the shortcomings of the traditional models or to operate a ‘survival of the fittest’ approach, and accept the resulting failures and casualties. Individuals will not just enter the profession by accident, but will also find that working as a project or programme manager will be accident prone as they realise (too late) that they are ill-suited or ill-prepared for the assignment they are asked to undertake.

References


Global Alliance for Project Performance Standards (GAPPS): http://www.globalpmstandards.org


