

## **Educating Programme Managers for the 21<sup>st</sup> Century**

Conference Report

22-23 June 2009

### ***Opening Session***

How can people be prepared for the “lived experience” of being the person responsible for managing a billion dollar mega-project? **Mark Winter** (Manchester Business School) helped to answer this question in his opening plenary session on the reflective practitioner. In acquiring high levels of competence in any skill, the learner progresses from the merely competent performer to the proficient performer and, ultimately, the expert. At this level of understanding and insight, the professional practitioner can grasp a situation holistically and interpret it rapidly, visually and intuitively. Competence at this depth is beyond the paradigm of mere technical rationality, but requires an ability to name and frame the problem, in such a way to include the complex social and political processes within a programme. Furthermore, the frameworks that the expert uses will need to be adapted and tailored as the programme progresses.

Mark reviewed the personal qualities of a project leader, which should include the ability to create clarity from ambiguity, while tolerating uncertainty. Programme managers should not rely on hierarchical control of people, but should lead by example and influence. Success of a programme is governed by relationships and the interactions between people involved. The framing and social construction of the programme will continually evolve and adapt.

### ***Experiences from University courses***

Universities are already tackling the problem of training programme managers, so the next session was an opportunity to exchange views from course leaders at UCL, Cranfield, Oxford and Queensland University of Technology, Australia. **Andrew Adkins** from UCL argued that MSc courses in programme management are about “business benefits, academic success and personal achievement”. Graduates of the course are likely to leapfrog their managers onwards to board level, as they challenge the previous lack of learning within the organization. **Paul Chapman** (Oxford) claimed that these courses are creating the new role of CPO (Chief Portfolio/Programme/Project Officer), but that many organizations do not yet have the organizational maturity to recognize the need for this role. **Liz Lee-Kelley** (Cranfield) followed up the idea of post-course development of the students, looking for a response from the host organization and checking that they respond to the graduate’s teaching and thereby retain the graduates of the course. This idea was taken a stage further by **Bob O’Connor** (QUT, Australia). The Australian course follows quite a different model from that in the UK. The course is an immersive programme of 2,000 hours of instruction and mentoring spread over 11 ½ months. Students are supported through a process to develop self-knowledge, including how they see others and how others see them. They are encouraged in holistic systems thinking which looks at the impact of their decisions on all stakeholders. Their learning is transferred to their workplace, though a climate of knowledge transfer that delivers observable and measurable change to the workplace.

### ***Experts Panel Session***

The afternoon **panel session** consisted of short presentations from the institutions, industry, consultants and auditors about their views on the problems of training programme managers. **Martin Price** (PMI and Engagementworks.com) reminded us of the disappointing statistics on government-funded IT projects. Between 1997 and 2007, one-third of the projects were discontinued before their finish. Given the impact of major programmes on the enterprise and life of nations and communities, programme management has to be one of the most challenging and complex jobs that mankind has ever devised. **Peter Simon** (APM and Lucidus) agreed with Martin that project management did not necessarily lead forwards smoothly to programme management, although all programme managers ought to know the basics of project management. Peter considered the effects of the increase in scale as projects become programmes. Programmes are complex, non-linear, steeped in ambiguity, and focus on ultimate benefits, so are quite different creatures from projects, requiring leadership beyond management.

**Mike Greenwood** (Balfour Beatty) picked up the point again about programmes being about customer focus, i.e. “delivering the client’s required business outcome”. The qualities of the programme manager are several, and include the ability to see the big picture, leadership, people skills, common sense, flexibility, technical knowledge, a good sense of humour and patience. Many of these skills are innate, but others can be acquired and developed through education and by mentoring and coaching through experience within the employer.

**Tim Banfield** (National Audit Office) returned to the theme of programmes being about delivering beneficial changes. He commented that programme management should be a broadly-based teaching programme, and that it should reach across to the host organizations of the graduates and particularly to programme clients. His work as an auditor suggests that the public sector should not be unduly maligned – their failures were in the public domain, but other organizations could quietly conceal their programme failures. However, there is a need in the public sector to involve project and programme managers early on in the process of framing large public sector projects, so that unachievable or risky programmes do not proceed to policy. Tim pointed out that a professional programme manager would have to consider their ethical position, as a professional, when agreeing to work on a project or programme that they knew was very likely to fail.

**Mike Christen** (BT) emphasized that programme manager has to produce value for their customer, while holding the end-to-end vision, rather than the step-by-step process, and remembering that all the stakeholders have stakeholders too. The programme therefore has to cope with “serious” complexity in their role. This requires rigorous questioning and scrutiny of data and information, boiling everything down to the “programme on a page”.

The ensuing discussion brought up a number of new themes. It was proposed that new models of organizations were needed, with much greater focus at board level on the delivery of projects and programmes. Courses run by universities and institutions help to grow understanding of the nature and complexity of programmes, but that learning needs to be part of the culture of organizations and governments as major programmes are proposed and initiated.

The current model of programme management focuses on contracts as a means to managing complexity and defining outcomes. However, a £22bn contract for a 17 year contract is bound to lead to problems, since technology cannot be known with certainty even two years into the future. Given this level of unavoidable ambiguity, the client and contractors should be working together to resolve the ambiguity and changes that will arise during the lifetime of the project. Perhaps a new kind of collaborative, alliance-based contract is needed that will enable the parties to develop and agree the scope of the programme, and agree the changes during the programme lifetime. Currently, contracts are about allocating risk, but could they be about agreeing mutual interest and mutual respect?

The current adversarial culture of challenging risk and responsibility will be difficult to change, and that is a problem that cannot be solved by changing the contracts alone. Programmes could become partnerships within a few organizations, subject to the vision of the programme leader. To bring about this cultural change would need a strong profession of project and programme managers who could challenge the dominance of the legal profession, who are driving the current culture of contracts. This cultural change would need to be accompanied by the growth of the educated client, who can understand the complexity of major programmes, and so does not need to rely on contracts as the sole means of obtaining “value for money”.

### ***Plenary Session***

**Peter Morris** (UCL) has a unique and detailed knowledge of the historical development of project and programme management in the UK. Project management is socially constructed, and therefore reflects what society values. Now that project and programme management (PPM) are being taught and researched in universities, they should play a part in shaping the debate about the future of PPM. Peter reviewed the debate about the definitions of PPM, and took issue with the view that project management is what occurs once the requirements have been defined. This viewpoint defines project management as contract execution management, which overlooks the complexity of the task and implies that project management is a well-defined process, rather than a context-dependent management task.

Peter returned to the role of universities in teaching and defining PPM. Universities cannot act as a repository of best practice, because academics are not close enough to the workface to know what best practice is, if such a thing does actually exist. Rather than trying to recognize and agree best practice, universities should be devising appropriate ways of thinking about PPM, while remaining grounded in real practice. Their role should be to present a theory-based view of the world, which provides a conceptual framework that enables predictability. This is more than simply recounting stories, but provides explanations of the stories in terms of theories and models. We should be calling upon different epistemologies with different interpretive and predictive powers, from across management practice.

Given the sensitivity to context, PPM best practice needs to be tailored to industry sector, company, business unit and even to the project itself. Therefore, we cannot take a process-oriented view of project management, but a theory-based view that provides the models to enable understanding and prediction. The special challenges of teaching and research in PPM include multi-disciplinarity, multiple sectors, and the marrying of theory and practice. Research needs to focus on ontology (the purpose),

epistemology (how we know what we know) and methodology (relevance and rigour of the research). It is the role of university research to shape the paradigm for PPM, not the professional bodies. Without theory-based input from universities, the professional institutions will tend to lag, rather than lead. The challenge for universities is to do more than just raise issues. They must engage with practitioners through action research, so that they may become aware of the reality of PPM.

A lively discussion followed Peter's talk. Again the point came up that PPM is not engaging with the top people. It is seen as a support function, and not relevant to the delivery of company strategy. Indicative of the "crisis" is that the Institute of Directors does not recognize project management and very few articles on PPM are published in its magazine.

Although university courses could be validated by the institutions, it is the business benefit to industry of the courses that should be assessed. Students have to make a case to obtain funding from their host organization to attend the course, which will spell out the wider business benefit of attendance. Universities are still defined quite narrowly, not in terms of business benefits, so they find it difficult within that model to embrace multi-disciplinary teaching and research.

### ***Practitioner session***

The afternoon session consisted of presentations from practitioners. **Paul Roberts** (Turnberry Consulting) concentrated on the stage of project management that precedes project execution. This front-end stage is very difficult and complex, since it involves project governance, client interaction and politics. Paul gave fascinating illustrations from the Scottish parliament building, the New York racetrack and a Manhattan hotel project. Many organizations will only carry out one major project in the lifetime of the individuals involved. They will need professional project and programme "procurers" to defend their interests. In such circumstances, the programme procurer or programme problem-solver needs judgment and intuition to solve a problem, and one approach will not solve everything.

**Richard Bayfield** (Richardbayfield.com) presented a case study of an unusual approach to project management when Honda built a new factory. As a lean manufacturing organization, Honda applied the 5 Whys procedure to find the root of every problem that occurred during construction. They realized that one of the problems of poor communication could be addressed by setting up integrated teams very early in the project. The emphasis was on fair, respectful treatment, including a collaborative contract, fair management of risk and early conflict resolution. Meetings were held every day, and the minutes were available in real time. As a manufacturing organisation, Honda were accustomed to information being available rapidly to everyone – why should it be different in construction?

**Donnie MacNicol** (Team Animation) picked up the need for a project leader, who is forward-looking and visionary, and capable of enlisting others in a shared view of the future. Project leadership focuses on relationship skills to achieve project success. However, project leadership is complex, since it needs to balance flexibility and control, and an optimistic view of the situation with a more pessimistic view. Leadership needs to manage the scope of the individual, the team and the entire organization. Donnie advocated continued training and support for the programme

manager, which could demand a new pedagogy that includes coaching and mentoring as the programme manager deals with the daily challenges of their complex and difficult role.

### ***Closing discussion***

The closing discussion was structured around the profession, pedagogy, and dealing with the public.

The implications of becoming a profession were discussed from a number of perspectives. There is the view that professions become defined by litigation and agreed standards of ethical behaviour, such as refusing to manage a project or programme or resigning from a project that one judges is likely to fail. In those circumstances, would the professional risk being sued, or risk exposing their firm to litigation? Could the PPM profession be defined clearly enough to withstand a legal challenge? Would the behaviour of project or programme managers change overnight as a result of their applying for a change in professional status? What would be the impact on corporate behaviours when project managers become professionals?

Given the discussion over the past two days about the range of social and leadership skills required of a programme manager, there was discussion again about what competences could actually be accredited. The Bodies of Knowledge of the APM or PMI can be examined and tested, but there is more to being a project manager. Although the institutions' Bodies of Knowledge are a good starting point, they do not provide the predictive, theory-based colligation of knowledge that can provide predictive insights. It is important to define and distinguish the roles of project manager and programme manager, since the recruiter needs to know which set of skills is being hired and whether they are appropriate for the job to be done.

The project or programme manager might also need to question whether they have control over the tasks and events for which they are being held accountable. Although they may be able to influence people and events through their skills of leadership and persuasion, they may not be able to exercise control. In deciding to hire a qualified professional, the recruiter also needs evidence that the job can be done most effectively and efficiently by the professional PPM, rather than an experienced engineer, lawyer or accountant. Up to now, that evidence is lacking.

Turning to the related topic of pedagogy, the universities must recognize that the traditional teaching methods do not meet all the requirements of a real-life, challenging, demanding role. They can collaborate with students and practitioners to provide insight and experience, but the definition of best practice must keep changing to stay abreast of the emerging challenges of PPM. Here, academics and the institutes must work together as the discipline and the profession(s) emerge. This collaboration should lead to an intellectually engaged profession, which is open to supporting students, engaging with academics in teaching and research, and open to reflection and development of the intellect, rather than learning processes.

An intellectually engaged profession will have to invest in its own future, not only with neophytes and universities, but with the corporations, firms and public bodies in which they operate. Greater presence at board level and commitment from CEOs will require a long-term effort by PPMs. However, in some organizations, that effort is

already underway, with Learning and Development budgets being spent imaginatively to deliver new methods to share and disseminate knowledge and practice.

Engagement with the public means moving even further outwards, beyond the organisations that recruit and hire PPMs, including explaining to other professional bodies and institutions what are the benefits and competences of PPMs. Innovative ways methods will be needed to bring together the communities of practice, the clients, end-users and the educational institutions.

***Topics for next year***

The closing thought of the conference was possible topics for next year's meeting. Suggestions included:

- Implications and Opportunities for the new profession of Project and Programme Management
- How to manage programmes better
  - Assessing the current track record and issues;
  - Identifying new opportunities
- Impact of project leadership
- CEOs and PPMs

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