

# Managing Projects – a holistic view

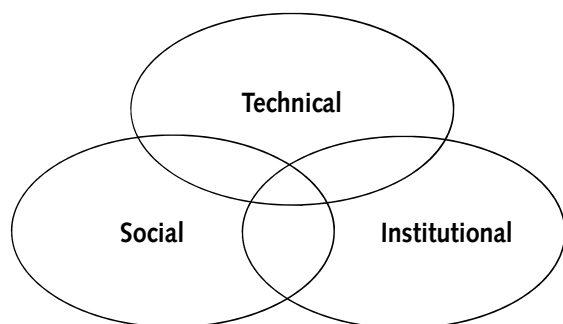
MICHAEL RANDEL of Olive focuses on a framework for understanding and working with project management. He argues for a more holistic and strategic approach to the management of projects which looks beyond project planning.

An increasing number of organisations are adopting a project-based approach to their work. For NGOs, the reasons for this can be traced back to the influence of their donors, who often tie funds to individual projects. However, it is also part of a wider trend in the world of organisations and work, with many private-sector companies adopting a project orientation in their organisation and management of work. Despite this growing shift towards project work, many organisations have only a narrow understanding of the skills needed by project managers.

In my experience of working with NGOs and government departments, “project” skills are typically viewed as “planning” skills. So the request for assistance that we often receive is to “...develop planning skills amongst our staff.” This seems to suggest that the organisation’s staff need only improve their planning skills to be better able to manage projects.

Yet the staff themselves often take a different view. In listening to the staff (through questionnaires before they attend a course, or in guided exercises during the course), we learn a more holistic view of the capabilities that will be needed to successfully develop and lead projects in their organisations.

In our courses, we are exploring the themes and patterns identified by participants as important for effective project work, and for project success. These themes have evolved into a very interesting framework:



Project managers, it turns out, need to draw on a wide range of capabilities if they are to be successful in their work. The skills are often complementary, and cannot be viewed in isolation from one another. Even more interesting, there are tensions in holding the balance between the three elements of this framework.

## The three circles ...

The **technical component** is the one that probably receives the greatest attention when people think about project management. This is the part of the framework that deals with the work of the project – developing the plan, identifying the activities, allocating responsibilities and scheduling the work. It also deals with monitoring and reporting, so it is the area of budgets and financial reports, of indicators and progress reports, and of quality and standards.

The donor literature on project management suggests that this is the heart of the matter. If one can only plan, organize and schedule, everything will go well. Undoubtedly, these are critical areas for project success. This is the area where models, steps, and frameworks are most evident – the “seven steps” of the Logical Framework Approach being perhaps the most well-known.

It is, unfortunately, a short step from “technical” to “technicist” – the reduction of plans and budgets to rigid procedures and requirements. No matter how often the opposite is stressed in training, many people think that their main responsibility is to implement the plan as it stands, and to report that the indicators have been achieved, on schedule and within budget. And if things don’t go as planned, then the response too often becomes one of whipping things back into line – getting the numbers up, increasing the pace of work, but never exploring what has happened to cause the plan to go astray.

The reality is that there are many things that can influence the project and the smooth implementation of the plan. The existence of these factors call for a more holistic approach to project management, to seeing the breadth of work that is required.

One immediate way to broaden your understanding of project management is to include people in your view. The **social component** requires the project manager to deal with two inter-related areas: the project team, and the individuals that make it up. A lot has been written about team-building and team work, much of which applies to project teams. There are two features that make leading a project team challenging: the team has a limited life-span, and it may consist of people who only work on it for part of their time.

Projects are by their very nature time-bound. A team is formed to work on a project by recruiting staff from outside the organisation, or by allocating staff already within the organisation to new responsibilities. A consequence of this is that team members may only have a limited loyalty to the project. If they have been contracted into the team from outside the organisation, their loyalty is more likely to be to their professional work than to the organisation, and they may be looking ahead to their next project. If they have come from another part of the organisation, they may continue to have some loyalty to their previous teams, and may be looking forward to returning there to “resume” their work. Both of these situations clearly present challenges to the project manager, who must explore ways to help people focus on the current task.

While some projects consist of a team of full-time people, there are many projects that make use of people who are working in a number of teams at the same time. The project manager must compete with other teams for the time and attention of their staff. This can present a risk to the project, especially if a team member’s other responsibilities grow to consume an increasing amount of her/his time, leaving the project without the person’s services.

The individuals that make up the team also require the

attention of the project manager. And as with so many other aspects of management, there is a tension: supporting and developing individuals, whilst ensuring that the team as a whole has a shared purpose. In supporting the individual members of the team, you can give attention to 3 areas<sup>1</sup>:

- 1 *Developing and empowering individuals* – part of the manager's role is to develop staff so that the project can be effective in its work. However, this development can also take a longer-term orientation, and give attention to the career development of staff members. This approach is to the benefit of the organisation as it promotes commitment and motivation.
- 2 *Motivation and reward* – people seek more recognition than can be offered through financial rewards. Other motivating factors should be given attention, such as having a sense of purpose in one's work, the opportunity to achieve results, the chance to learn new things and deal with new challenges, and recognition and acknowledgement for contributions to project success.
- 3 *Counseling and discipline* – the project manager should offer regular feedback to staff member's on their performance. A clear understanding of what is expected of staff can provide a foundation from which clear feedback can be offered. This also makes it easier to develop paths of action to improve unsatisfactory performance.

These technical and social components are probably the most familiar to project managers. The remaining component is less familiar yet equally critical for the success of the project. This third part deals with the **institutional context and relationships**. In NGOs and other development agencies, projects are typically intended to bring about change. As with any change process, there will be those in favour of it, and those resistant to it. The relative strength and influence of these forces can sway the project towards or away from success.

The first challenge facing the project manager is to define their institutional context and to identify the various actors. While the project might be housed in one organisation, its eventual success may be influenced by a number of different organisations. These actors might include the senior management of the host organisation, donors, government agencies, target and beneficiary groups, and contractors who provide services to the project.

Based on their support to the project, these actors may be classified as "allies" or "enemies" or, possibly, "neutral." The purpose of this is not to stereotype and label the actors, but to help the project manager in identifying strategies to influence them for the benefit of the project.



Juggling the elements of project management.

Hanks, K. 1990. *Up Your Productivity*. USA: Crisp Publications, Inc.

This can be viewed as political work, for the project manager will have to learn how to read the interests of the institutional partners and then decide how best to influence them. Important tools for this work of influencing will be the credibility of the project manager, and the appropriateness of the information s/he provides to project partners.

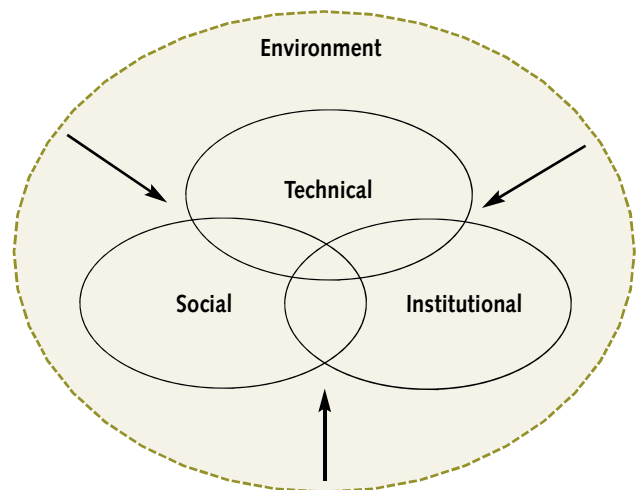
This work of influencing and dealing with relationships can be the most difficult for a project manager. It cannot be reduced to a few "steps for success", as each relationship will need to be handled in a unique manner. It cannot be scheduled and programmed, for all sorts of events can give rise to new and unexpected questions.

Yet it is probably the most rewarding area to which the project manager can give their attention, as this can have a major influence on the project's eventual outcome.

... with one further element ...

The three inter-linked circles illustrate the inter-relationships between the three components discussed above. When participants in our courses identify factors that they think help or hinder projects, they identify elements that fit into the three elements of the framework.

And yet something seemed to be missing from the picture. Drawing from our own experiences in planning and reviewing projects, we can identify a fourth component to add to the framework. This new component challenges us to think more consciously of the *environment* in which the project is located. This contextual understanding surrounds and underpins the other elements. The earlier diagram can be adapted to look like this:



<sup>1</sup> These ideas are drawn from Turner, Grude and Thurloway (eds). 1994. *The project manager as change agent: leadership, influence and negotiation*. London: McGraw-Hill.

There are many different ways of reading and understanding this environment. One useful framework is the PESTEL analysis:<sup>2</sup>

- 1 Political
- 2 Economic
- 3 Socio-cultural
- 4 Technological
- 5 Ecological
- 6 Legal

This tool allows the project team to explore the environment for trends and forces acting against the organisation, for example, threats, challenges, etc. It can also be used to look for emerging opportunities or positive forces. In practice, it is better to draw on the project team's combined experience and insight rather than relying only on one person's views. This allows you to tap into the richness of diverse thinking which might otherwise be lost.

One way to embark on the exercise is to divide the team into 6 groups, each of which then works on identifying potential threats (or opportunities) under the following headings: political, economic, socio-cultural, technological, ecological, legal.

If your team is too small to form six groups, three groups could take two categories each, or your team could work through each category together.

Trends and forces are captured on cards and put up for the whole group to see. These can then be discussed and additions or changes made. New categories or forces (e.g. cultural or psychological) may also emerge and be incorporated. The ideas that emerge from the discussions can then be assessed in relation to the project and its objectives. Areas can be identified where a response is needed by the project, and these can be delegated to team members for action.

Care must always be taken, though, that a structured exercise, such as the one described above, does not replace continuous strategic thinking about your environment.

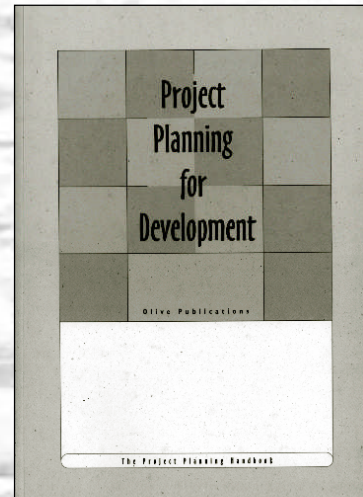
An awareness of the PESTEL elements can help deepen the project team's understanding and consciousness of the broader environmental issues facing the project. Further, an awareness of the elements can assist the project manager to look into the future, and to anticipate new opportunities, challenges and questions because of current events or emerging trends and patterns. Of course, no one can perfectly forecast the future, and that should not be your intention. Rather, this additional perspective can help you prepare and position yourself to deal with what is coming towards you, rather than being caught unprepared. It calls for strategic thinking rather than long-term planning, for responsiveness rather than programmed reactions.

This broader approach to project management can help NGOs and other development actors view what they do in a more holistic manner. It does raise questions about how the work of project managers is defined, and how they are supported in their organisations. It challenges us to think about how we design and offer learning and development opportunities that will equip people to work effectively and holistically in the position of project management. It is my hope that this article will stimulate discussion by practitioners on these matters.

### Authors' acknowledgement

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<sup>2</sup> For further information on this tool, see Thaw, D. and R. Petersen. 1999. *Ideas for a Change: Part 1 - Strategic Processes* (2nd edition). Durban: Olive Publications.