

# Managing the Institutional Context for Projects

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## ABSTRACT ■

Project management is widely seen as delivering undertakings on time, on budget, and on scope. This conceptualization fails, however, to address the front end and its management. Addressing the front end moves the discipline to a second, more strategic level. This article proposes a third level of conceptualization: the institutional level, where management is focused on creating the conditions to support and foster projects, both in its parent organization and its external environment. Management here is done *for* and *on* the project rather than *in* or *to* it. We show that management at this level offers an enlarged research agenda and improvement in performance.

**KEYWORDS:** context; institutional theory; institutions; management of projects; portfolio management; program management

## INTRODUCTION ■

While projects have existed, and have been managed, since the dawn of time, project management, in its modern form, as characterized by the language, tools, techniques, and concepts that we now associate with it, first appeared in the early 1950s (Johnson, 1997). Since then, much has taken place to improve our knowledge about, and performance in, the management of projects.

The thrust of most work in developing the field has, quite naturally, been about what managers working on projects need to do in order to deliver them successfully. Later we began to ask questions about what we really might mean by “success” and, almost simultaneously, began to recognize the important role management has in developing the project’s definition—in managing the project front end.

This article acknowledges an emerging third category in the development of project management thought: what we have termed, following Parsons (1951, 1960), the institutional level. We propose that project management can be thought of in terms of three levels:

- *Level 1:* Technical—that is, operational and delivery-oriented;
- *Level 2:* Strategic—managing projects as organizational holistic entities, expanding the domain to include their front-end development and definition and with a concern for value and effectiveness; and
- *Level 3:* Institutional—managing the institutional context, creating the context and support for projects to flourish and for their management to prosper.

We shall now briefly review Levels 1 and 2 before moving to a discussion of Level 3.

### Level 1: The Technical Level

The character of the project management discipline that emerged in the 1950s and 1960s was largely technical, both in terms of its engineering management character—combining project management, systems, and engineering management (Hughes, 1998; Johnson, 1997)—and with a strong emphasis on managing technical issues, most notably by means of configuration management, and schedule urgency (Morris, 1994, 2011). This emphasis was strengthened when the U.S. Department of Defense (DOD) mandated various tools and techniques in the early 1960s (work-breakdown structures, earned value, program evaluation and review technique [PERT], value analysis, and the like) that have since become core to project management. Soon they were required on NATO projects too.

Public interest in project management grew in the late 1960s on the back of the Apollo moon program and through the requirements of DOD, the rise of the matrix form of organization, and the growth of computing. The discipline

was now strongly systems- and tools-based, often heavily bureaucratized, and essentially middle management in character (Baumgartner, 1963; Cleland & King, 1968). This difficult and exciting new landscape spawned a proliferation of seminars and symposia culminating in the establishment of societies dedicated to project management (PM), such as the Project Management Institute (PMI) and the International Project Management Association (IPMA), around 1969–1972, largely as communications fora.

Slowly, these societies matured into professional associations (Hodgson & Muzio, 2011). One of the attributes of professionals is evidence of the mastery of a distinct body of knowledge leading to a “license to practice” certification. This obviously implies some definition of the knowledge area, a path mooted within PMI in the mid-1970s (D. L. Cook, 1977). As a result, in 1983, PMI published its *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* (Project Management Institute, 2008), leading to its certification program. Topics were selected for inclusion in the *PMBOK® Guide* on the basis of their being “unique” to project management, as opposed to being more general knowledge.

Certification has proven to be extremely popular, and the *PMBOK® Guide* has become enormously influential. As of March 2010, there were over 3 million copies of the *PMBOK® Guide* in circulation (Project Management Institute, 2010) with 375,959 Project Management Professionals (PMPs)®. The *PMBOK® Guide* is widely recognized as the most commonly used model of project management, though it is not without its critics.

Being cast as a project management methodology, the *PMBOK® Guide* is normative in character, though in fact its principles reflect the closed-system, positivist world of the 1950s and 1960s. This was the epistemological culture that typified DOD and NASA project systems management from where the formal discipline arose. There is nothing

necessarily wrong with this, as long as it fits its context and needs, and indeed the user is encouraged to tailor the choice of topics and their applications to fit a project's needs.

The *PMBOK® Guide*, like *PRINCE2* (Office of Government Commerce, 1999), basically reflects the Level 1 paradigm of project management: it proposes a set of tools and processes that, when applied properly, should lead to project success. (Success here is defined as “project and product quality, timeliness, budget compliance, and degree of customer satisfaction” [Project Management Institute, 2008, p. 9], where customer satisfaction is defined as conformance to requirements and fitness to use.) Many find this not always wholly credible, however. The assumptions of rationality and certainty, together with the fact that some key topics are not covered (strategy, technology, people, etc.), mean that, for many practitioners, such methodologies do not always seem adequate to the challenges and complexities experienced in managing their projects (Laufer & Hoffman, 2000; Morris, 2011).

A further major criticism is that the model of project management represented by the *PMBOK® Guide* is preeminently one of delivery execution—one where the requirements are defined, where the cost, schedule, scope, and other targets have been set. Yet this area needs managing. In fact, there is huge evidence (going well back to DOD days) that the front end is both where the most damaging errors get built in and, alternatively, where there is the biggest scope for enhancing value (Morris, 2009). The *PMBOK® Guide* does not address the developmental nature of project front-end management.

## Level 2: The Strategic Level

Just as this new discipline began to emerge publicly in the late 1960s and 1970s, project failures seemed to increase, both in numbers and visibility. In some cases, projects failed precisely because they lacked effective project

management—for example, the Concorde. But in others, although DOD best practice was being applied, the model didn't work. Concorde's American rival, the U.S. SST, was managed using DOD systems but with no effective stakeholder management—which led in 1970 to Congress withholding funding support and the project's cancellation (Horwitch, 1982). Even DOD programs experienced problems, particularly of technology selection and proving, project definition, supplier selection, and, above all, concurrency (Morris, 1994).

To add to this, as the 1970s moved into the 1980s and beyond, the environment in which project management operated became increasingly complex. The requirements of, and/or opportunities in, for example, health, safety, and environment; risk and opportunity; value and benefits; information and communication technology; new supply-chain methods of management (most notably, partnering); and new ways of procuring (e.g., private finance initiative [PFI] and public-private partnership [PPP]) progressively built a landscape where behavior and conceptual ability were as important as technical and commercial finesse. This more demanding environment, coupled with the challenges and high rate of project failure in many technology-demanding sectors, such as nuclear power, oil and gas, software, and weapons systems, stimulated a number of what Jugdev and Müller (2005, p. 25) termed *critical success studies* that, collectively, were to build on a new perspective for addressing projects and their management.

An early review that was to have an important impact on the profession in the United Kingdom by the Association for Project Management (APM) in shaping the *APM Body of Knowledge* in the early 1990s (APM, 2006; Morris, Crawford, Hodgson, Shepherd, & Thomas, 2006) and by the IPMA Competency Baseline (Pannenbacker, Knopf, Morris, & Caupin, 1998) was

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the analysis of project success and failure by Morris and Hough (1987). Reviewing studies on 1,653 projects, they showed that typical sources of difficulty were unclear objectives, changing sponsor strategy, poor project definition, technology difficulties, concurrency, inappropriate contracting strategy, unsupportive political environment, lack of top management support, funding difficulties, inadequate manpower, and geophysical conditions (topics not specifically addressed by the Level 1 methodologies). Recommendations thus focused around aligning the project strategy with the sponsor's; managing technology; influencing stakeholders; establishing an appropriate commercial platform; scheduling; leadership and teamwork; and ensuring appropriate governance and control—and doing all of this in the project-definition stage as well as in the downstream execution phases.

Subsequent studies, for example, the World Bank (1997) on development projects; Miller and Lessard (2000) on very large engineering projects; Flyvbjerg, Bruzelius, and Rothengatter (2003) on transport projects; Grün (2004) on “giant” infrastructure projects; and Meier (2008) on U.S. defense and intelligence projects, reinforced these points, and in particular the importance of managing the front end (Williams, Samset, & Sunnevåg, 2009). The focus in all these studies was what had to be managed in order to develop and deliver the project successfully—something bigger than delivery execution management. This enlarged perspective became in time, we believe, a new paradigm for the discipline.

To reflect this focus on the project as a whole, Morris termed this broader perspective “the management of projects” (mop)—the project as an organizational entity, which has to be managed successfully within its business and social context (Morris, 1994)—a conception that, while possibly attractive descriptively, is very broad. More polythan pantheoretic, “mop” emphasizes

several principles (the front end, context, people, etc.) but is not built upon such strong theoretical orientations as others that have now come along, such as the Scandinavian School's actor orientation and, particularly, “projects as temporary organizations” (Lundin & Söderholm, 1995; Packendorff, 1995), or Shenhar and Dvir's (2007) emphasis on contingency theory, or program management or critical chain project management.

The “management of projects” approach reflects a focus on both management by the project management team (PMT) and other actions, for example, enabling activity in the enterprise's environment. In this article, we propose splitting out the work required in shaping the project's environment—its context. Work done on the project institutional context we have called, following Parsons (1951, 1960), the institutional level. The focus of Levels 1 and 2—the technical and strategic levels—describes what managers need to do when working within the project to shape and deliver it and drive the project forward through its development life cycle. Level 3 is about management *on* or *for* projects as opposed to management *of* or *in* them; management outside the project but in its environment, aimed at developing the enterprise's institutional ability to manage projects effectively.

### Level 3: The Institutional Level

Project management research has been criticized for its tendency to treat projects in isolation (Engwall, 2003; Söderlund, 2004), although recent research has begun addressing this. The importance of context, for example, is empirically examined in work on fit between project type and organizational structure (Hobday, 2000), tools and processes (Besner & Hobbs, 2008; Dvir & Shenhar, 1998), and leadership styles (Malach-Pines, Dvir, & Sadeh, 2009; Müller, Gerald, & Turner, in press).

Engwall (2003) extended the criticism by showing that projects are shaped in particular by institutional

factors such as experiences from past activities, politics, and institutional norms, values, and routines, an argument also developed by Hodgson and Cicmil (2007) and Kadefors (1995). We are extending Engwall's critique by proposing that there is benefit in focusing management attention on the development of an appropriate institutional context for projects, rather than being about the activity of managing projects *per se*. We seek also to acknowledge the institutional level as an emerging distinctive area of research.

The conceptualization we are offering builds off Parsons' three “levels of rational action” (Parsons, 1951, p. 549; 1960, p. 63) and his distinction between the “outer” and the “inner” natures of these levels. The first two levels, the technical and strategic, operate within the project. The third, the institutional level, is outside and around the project. Parsons is no longer as in vogue a thinker as he was 50 years ago, and such top-down theorizing is not as popular today as it was then, but this distinction between intra- and extra-project management work in contributing to improved project performance is, we believe, potentially a powerful one.

The essence of Level 3 compared with Levels 1 and 2 is thus as follows:

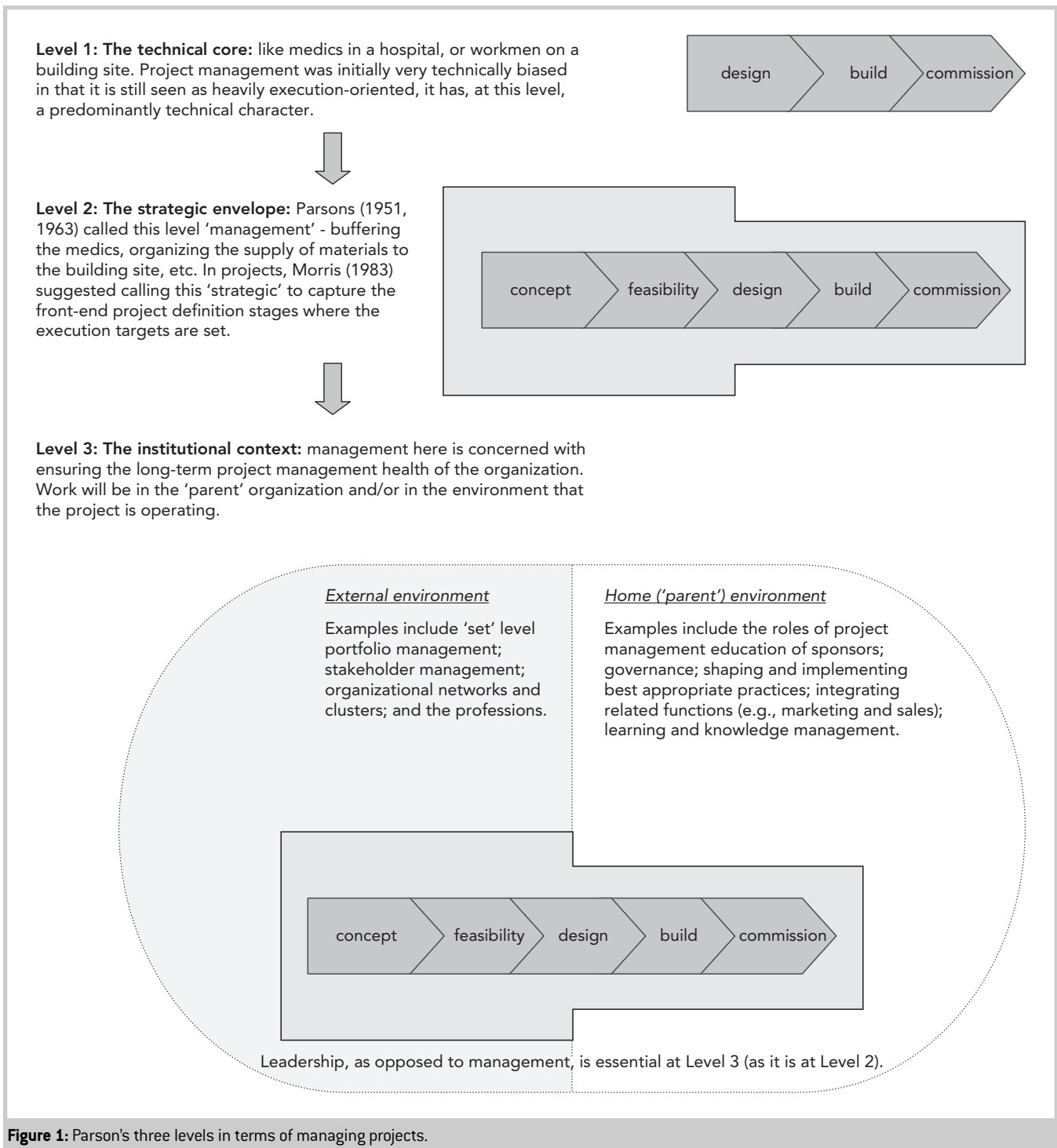
- Level 1 is a predominantly technical—that is, operational and delivery-oriented—function. The key concern is how to deliver projects efficiently—on time, in budget, and to scope. Knowledge, practice, and research at this level tend to be largely normative and positivist. Practice is biased toward techniques and processes and reflects the 1960s DOD and NASA systems project management, though not exclusively so.
- Level 2, the project's strategic level, looks at managing projects as organizational, holistic entities, expanding the domain to include their front-end development and definition and protecting the technical core from environmental turbulence. Work at Level 2 recognizes the relationship between

the project and various stakeholders' strategies (not least the sponsor's). There is a strong concern for value and effectiveness.

- Level 3 is the "institutional" level. This is about developing an appropriate

institutional context for projects and programs to enable them to succeed and enhance their effectiveness. Management at Level 3 is primarily concerned with improving success not of a specific project, but of projects

within the enterprise's own organizational environment—that is, projects in the parent organizations—or the wider environmental context within which the project is located, or both (see Figure 1). Work at this level can be



**Figure 1:** Parson's three levels in terms of managing projects.

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through rational “hard” mechanisms such as processes, standards, and guides, but it also addresses the “soft” aspects of the institutional context, such as social contracts, behaviors, culture, and the like. It takes place outside of the management issues of the individual projects or programs, but predominantly in their institutional environment. Level 3 is concerned with the management *for* or *on* projects as opposed to management *of* or *in* projects. In recognizing the role and opportunities for management at Level 3, the focus switches “from organizations in their environment to the organization of the environment” (Scott, 2008, p. 436).

Since context covers more than institutional issues, why are we focusing now just on the institutional? For two reasons: (1) this generally is the most tractable to project management intervention, and (2) other contexts, for example, the economic aspects, may be beyond the ability of project management staff to influence.

Inevitably, much of the research done so far on managing (or influencing) the institutional context has focused on Level 1 project management. Even Winch (2010), while overtly taking a “management of projects” stance, treats the institutional context of construction projects as largely given (p. 11). However, we do not lack evidence supporting the need to explore the institutional level, as mentioned earlier (Engwall, 2003; Hobday, 2000; Pellegrinelli, 2002), it is also worth noting Cooke-Davies’ (2002) work on critical success factors, which proposes three types of success—project management success, project success, and consistent project success—has implications at all three levels. The first concerns the technical level, and the second involves the strategic level, while achieving consistent project success ultimately calls for work at the institutional level.

### Analyzing the Institutional Level

The remainder of this article explores the thesis that there is value in seeing

the institutional level as a fruitful, powerful unit of analysis in project management practice and research. Our contention is that institutional issues are important to the long-term performance of projects, that there is benefit in recognizing them as a group, and that there are theories that apply at this level in ways that are distinctive and useful.

One obviously relevant theory is institutional theory, which explores how organizations gain, and maintain, their characteristics (Scott, 2008). This will be seen, not surprisingly, to have a special richness, but it is not the (only) theoretical lens appropriate for analyzing Level 3 concerns, though it is useful. Sociology, economics, law, geography, politics, and statistics offer many different theoretical frameworks, which are, at times, relevant to exploring the management at the institutional level.

The following examples are discussed as illustrative of our argument:

- the interaction between context and the enterprise’s attempts to establish best practices and organizational learning;
- the institutional challenges of the project management professions;
- the challenges of governance and, in particular, the role of the sponsor;
- the interaction between context and organizational structure, in resourcing, and in managing external groups;
- portfolio management and the political context; and
- the role of leadership in these examples.

In each example, we acknowledge the work of scholars to date and look at potential opportunities, both for practitioners and researchers. In all cases, we note, implicitly or explicitly, that there is an important potential two-way interaction between actors and their environment in shaping the enterprise’s structure, designing its processes, promoting its practices and behaviors, shaping policy and standards, and influencing stakeholders and decision making—and doing so with the express purpose

of improving (the capability of) project management. This we address overtly in the section on leadership.

### Best Practices and Context

It seems obvious, given the work that has already been done here (Hobbs & Aubry, 2008), to start with the PMO (project or program management office). Empirical research has shown that PMOs take many forms, from administrative support to becoming a center of excellence to a full organizational function with responsibility for managing and delivering projects (Hobbs & Aubry, 2008). What seems to be consistent across all empirical studies and textbooks is that PMOs emerge from the need to create a standing platform and system for projects that survive beyond the project life cycle, whether it pertains to human resource management, reporting systems, or quality assurance. Over the last decade or so, PMOs have in this way had a growing role in promoting the institutionalization of project management knowledge—for example, in defining best practices, developing methodologies, selecting practices, and organizing training. Most of the work of a PMO tends to be, with few exceptions (O’Leary & Williams, 2008), highly normative due to the very nature of these entities, however (e.g., Dai & Wells, 2004; Hill, 2004), and contextualization remains a challenge.

The “nctp” (novelty, complexity, technology, pace) model of Shenhar and Dvir (2007), probably the most well-known contingency model in project management now, is project-specific, in that its contingency variables focus on the technical aspects of managing projects. Other recent frameworks have attempted to provide broader conceptualizations of context (e.g., Gerald & Adlbrecht, 2007). However, like Shenhar and Dvir’s model, the work has been at the project, not the institutional, level.

Interest in maturity models has grown considerably in recent years. Such models suggest that levels of an

organization's project management capabilities can be demonstrated by climbing predefined maturity ladders. But most maturity models are focused on operational issues and underacknowledge human dimensions; they tend to reflect commonality and standardization of practices rather than innovation and creativity (Jugdev & Thomas, 2002). And crucially there is little or no attempt to acknowledge the significance of context.

In fact, the question driving the work on maturity models, PMOs, and project typology frameworks such as the "ncpt"—how to provide and develop organizational capabilities to support and enable project success—is central to Level 3, and currently remains unaddressed to any real length or depth. The subject cries out, one would think, for an analysis along the lines of Scott's three pillars of institutions (regulative, normative, and cultural-cognitive), following DiMaggio and Powell's (1983) coercive, normative, and mimetic, as applied across a variety of mechanisms, logics, and emotions (Scott, 1995). To the best of our knowledge, such a study has yet to be published.

### ***Organizational Learning***

A particular challenge of the institutional level pertains to how the enterprise can best gather, organize, deploy, and use knowledge and improve its organizational learning, the concern being the long-term health and stability of the enterprise. This is a well-trodden area, particularly in the tacit-explicit transformative process (Nonaka & Takeuchi, 1995; Wenger, 1998) and sensemaking (Weick, 1995) in many ways prefigured by Berger and Luckman (1967) with their emphasis on reification of learning. But despite all the academic work in this area, organizations still face substantial difficulties in learning from projects (Love, Fong, & Irani, 2005; Williams, 2008). There is still a tendency to emphasize the recording of explicit knowledge, whereas tacit

knowledge is widely seen as more valuable (Morris & Loch, 2004). Recent work drawing on institutional theory is, however, offering a richer analytical framework.

Grabher and Ibert (2011) have applied the notion of organizational ecology to organizational learning to develop the concept of project ecology: the layers of relational space—the core team, the firm, the epistemic community, and personal networks—which together constitute “the personal, organizational, and institutional resources for performing projects” (Grabher & Ibert, 2011, p. 176). They show how together these shape project learning often well beyond individual project lives.

### ***The Project Management Professional Bodies***

The professional associations have played a central role in the development of project management, and at institutionalizing what is understood as the discipline (Hodgson & Cicmil, 2006). The role of professional bodies and issues connected with their work are of concern at Level 3 (Hodgson & Muzio, 2011; Morris, Pinto, & Söderlund, 2011). For example, in what sense should a Body of Knowledge for project management be conditional? How flexible should its structure and contents be to keep up to date with research? How valid is certification as a license of competence, particularly in a learning-as-doing environment such as that represented by project management (Cook & Seeley-Brown, 1999)? How should reflective practitioners (Schön, 1983) position any disagreement with project management standards? What does a professional standard of professional conduct mean? (For example, in a dispute with the sponsor?) Should project management ever have the professional sanction of, say, the company auditor?

### ***Sponsorship and Governance***

The critical success factor studies described previously found that the behaviors, expectations, and demands

of individual managers acting in the sponsor role can strongly influence the rigor and structure with which project management practices are applied—yet there has been little work done to address this. Hertogh, Baker, Staal-Ong, and Westerveld (2008) provide a useful summary of the different roles of the sponsor and the delivery for organizations having large infrastructure projects, and Miller and Lessard (2000) define four broad areas of sponsorship competence (pp. 29–31)—but, in reality, the role of the sponsor is often complex and not well defined, particularly in the public-sector projects (Altshuler & Luberoft, 2003; Flyvbjerg et al., 2003).

Critically, the sponsor will often have to balance project-oriented decisions against (parent) company concerns. (For example, what would sending this project back for further work do to the company's share price?) How many organizations compromise their project management performance by undereducating their sponsors in the management of projects' principles and by not aligning the sponsor's goals and incentives with the project's?

Similarly, the actions and demands of the organization's board in exercising governance, for example, to ensure enterprise project strategy alignment, assess risks, and require independent and third-party reviews (peer assists, etc.), can significantly influence project management behavior and performance (APM, 2006; Müller & Turner, 2010). In reality, the client, owner, sponsor, and stakeholder area—the governmentality area (Clegg, Pitsis, Rura-Polley, & Marosszeky, 2002)—is often complex yet is crucial to the effective management of projects. Much lies within the sponsoring organization itself, but that doesn't necessarily make it more tractable.

### ***Project Structure and Context***

At the heart of Level 3 is a concern with the interplay between agency and institution. This is a particular interest of contemporary institution theory, not

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least in Giddens' (1979) structuration theory. Contingency theory has been a long-standing interest of project management theorists since at least the work of the 1960s and 1970s on integration (Galbraith, 1973; Lawrence & Lorsch, 1967; Mintzberg, 1979; Thompson, 1967/2003), and as further developed by Larson and Gobeli (1989), Wheelwright and Clark (1992), and, more recently, Hobday (2000) and Engwall (2003), as noted earlier.

While much research in the area still remains ingrained with the issues of matrix structures (Davis & Lawrence, 1977), more creative forms of structuring are now offering managers new opportunities—for instance, “program-mification” (Maylor, Brady, Cooke-Davies, & Hodgson, 2006), or networks (Grabher, 2002; Pryke & Smyth, 2006). Externally, Level 3 offers much richer structuration possibilities.

While a simple view of managing single projects (Level 1) encourages a mono-organizational perspective centered on the project, it soon becomes apparent, because of subcontracting or matrix-type arrangements, that the project's management must deal with several organizational groups external to the home project organization. At Levels 2 and 3, the number of such external groups can expand significantly (Grün, 2004). These external groups may be stand-alone organizational networks or constitute clusters in the neo-institutional sense of sets or fields (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). Although external to projects, they may exert great influence over them (e.g., banks, regulators) or relate directly to them (e.g., supplier framework agreements). They may exist already as in the case of the Hollywood film cluster (DeFillipi & Arthur, 1998), or by being formed through economic or other stimuli (Manning, Ricart, Rosatti Rique, & Lewin, 2010), or be specially created, either by the project (Level 2) or the enterprise for the project or program (Level 3), as for example when organizing

construction supply chains on a local geographic basis to minimize the project's carbon footprint.

Each of these groups exists in an organizational context—an environment—that may influence the project significantly. The potential for management to shape the interactions and contexts within which such groups operate has not yet been researched comprehensively or systematically. We are only beginning to understand and exploit such formal and informal structures.

### ***Strategic Resourcing and Procurement***

A fundamental challenge with projects and a major preoccupation at Level 3 is resourcing—that is, ensuring the right competencies will be available and suppliers will be engaged on the best terms. While this is also a concern at Levels 1 and 2, at Level 3 the driver is more strategic—a combination of organizational stability, resilience, and order on the one hand, and adaptability and innovation on the other—often in a context of social or economic or general change. It is also often organized outside of the individual project (and therefore beyond Levels 1 and 2).

Penrose (1959) argued that growth is the result of particular groups of individuals, and that since there is an obvious limitation to what these individuals can cope with and as even the integration of new recruits takes time, the speed at which firms can grow is constrained by the resources available. A major task of the management at Level 3 is the building of a portfolio of resources (Davies & Hobday, 2005), and identifying and developing the enterprise's core project management competencies at the organizational level (Jugdev, 2004; Prahalad & Hamel, 1990), as well as competencies of individuals. Hence, we see a growing interest in employment and career development issues in a project context (Ekstedt, 2002; Huemann, Turner, & Keegan, 2004; Söderlund, 2000).

Many resources will be procured using contracts, again by Level 3 groups

external to individual projects (contracts and procurement). There has been a major shift in project procurement practice over the last 15 to 20 years from transactional tendering to a more relationship-based form of contracting and supply-chain management (Smyth & Pryke, 2008). Yet the move is neither permanent nor without its critics. In a cost-cutting move, the British Airports Authority, for example, one of the UK champions of partnering has recently reverted to open tendering. Academic work has been slow to engage in this argument. The trouble is that relational alignment between members of the supply chain, along the lines charted by, for example, Bresnen and Marshall (2011); Clegg, Bjørkeng, and Pitsis (2011); Manning (2008); Miller and Lessard (2000); Smyth and Pryke (2008); and others, while making obvious intellectual and emotional sense, often ignores pressures to reduce transaction costs (Stinchcombe & Heimer, 1985; Williamson, 1975). Researchers have largely ignored this challenge.

Along similar lines, resource-dependence theory (Pfeffer & Salancik, 1978) proposes that firms may be dependent on external resources over which they have varying control. In a project context, this means that project managers can make use of their resources to exert power over their context, as shown, for example, by Cox (1999; Cox, Ireland, & Townsend, 2006).

### ***Integration of External Groups***

The impact of outside groups and issues on projects has long been recognized as important—for example, Raborn working congressmen's districts on Polaris (Sapolsky, 1972, pp. 47–49) and Apollo keeping TV cameras despite weight challenges (Brooks, Grimwood, & Swenson, 1979, p. 266). The need to know and address the project's stakeholders, many if not most of whom will be external, is now a mainstream project management practice; stakeholders can even be seen as a form of client (Newcombe, 2003). Current stakeholder

management practice revolves around mapping stakeholder influence (Littau, Jujagiri, & Adlbrecht, 2009). There is room to go beyond that, however. Institution theory would suggest that there could be rich potential in using Scott's "pillars" (Scott, 1995) to study how best to engage stakeholders. Orr and Scott (2008), for example, showed how costs rose on 23 large projects "after failing to comprehend cognitive-cultural, normative, and/or regulative institutions in an unfamiliar societal context" (p. 562).

Then there are institutional functions that need integrating with project management. Is estimating part of the project or not? It is clearly a critical function, yet it is often located outside of project management (as advocated by Kahneman & Lovallo, 1993). Is estimating a Level 1, 2, or 3 activity? The same applies, often, to contracts and procurement, even though the form of contract and the conditions under which it is administered generally has a powerful and direct influence on the way projects are managed.

Another critical outsider group in many project-based enterprises is marketing and sales. The problems when marketing and sales sells the project at an unrealistic price or delivery date or has little or no consultation with the project management department are common. Equally common can be the failure of the project management department to get to the sponsor, to listen and gear execution according to a mature understanding of the client's requirements over, above, and beyond the minimum requirements/brief documentation as gleaned through business development. This sounds like a Level 2 point, but the institutional effect, of knowing the client at a deeper, more tacit, Level 3 enterprise level can be very powerful for the project (or the portfolio). As project-based firms become more established and markets become less fragmented, firms will start to identify the importance of relationships and

partnerships over transactional approaches (a Level 3 preoccupation).

### ***Managing Portfolios at the Societal Level***

Classically, portfolio management is concerned with the disposition of assets in terms of their potential reward and the risk they individually and collectively represent, and the amount of work (resources, capabilities, etc.) that developing and servicing them will require. Thus, for example, portfolio management of drugs in a pharmaceutical company's development pipeline involves assessing views on clinical efficacy, competition, risks, potential sales volumes, and pricing. The management regime and activities involved in bringing emerging candidate drug projects through the evolving portfolio are performed really *on* the projects rather than in them. As such, portfolio management is a Level 3 activity. Managing the development pipeline in a medium to large pharma involves a network of committees making portfolio and governance decisions at Level 3 on a systematic and frequent basis that may directly impact the company's Level 2 and 1 project management (Foulkes & Morris, 2004).

Sometimes management of the emerging projects in the portfolio needs more direct intervention. Sometimes it isn't clear if it should or not. In the built environment, population growth is pushing housing demand, upping power requirements, increasing carbon emissions, and exacerbating problems associated with food, water, and waste. Such challenges are now widespread, whether countries are rich and investing heavily, poor and working with scarce resources, or free-market based or planned. Bringing candidate projects forward amid this conflux of needs and opportunities is a major challenge. How effectively is it managed?

In the United Kingdom, the government relies heavily on market forces, bolstered by a planning regime providing

regulations with approvals delegated to the local level except for major projects, coupled with some project management assistance (methodologies and stage-gate reviews). Is this environmental context adequate? Some think not—a recent report on land use called for decision making to be more integrated, with "sufficient oversight . . . that greater coherence and consistency is achieved" but questioned how centralized this should be (Government Office for Science, 2010, p. 35). In China, urban development is managed more centrally and directly. Perhaps the response to emergencies (e.g., hurricanes and earthquakes) could also profit from such centralized governance. Clearly, political context plays a decisive role (Bremmer, 2010). Management should try and shape this environment (Manning et al., 2010); research needs to understand it better (Altshuler & Luberoft, 2003; Feldman & Milch, 1982; Mintzberg, 1979).

### ***Leadership and Management***

All of these examples stress the importance of leadership. We are used to thinking of leadership at the intra-project levels: establishing strategy, forming teams, making decisions, and so on. Leadership at the institutional level is similar but operates at the enterprise or enabling level—for example, leading the development of an organization's mission and vision or technology strategy, optimizing capital allocation, maintaining project management integrity, ensuring an appropriate contracting and procurement environment, providing and nurturing competent personnel, developing a culture driven toward the timely performance of projects with adequate funds, looking for opportunities to improve short- and long-term performance both internally and externally, promoting relevant organizational change, challenging the status quo, and helping the organization to adapt to shifts in a wider context. Leaders can, as powerful organizational actors, work with and



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through organizational structures and routines (including hard mechanisms, such as health and safety, capital expenditure approval, reward systems and human resource policies to soft aspects, such as stories, images, and belief systems), to shape their own version of institutional culture. They thus contribute to a social capital that can then be leveraged by projects.

Large, complex, and urgent projects and programs invariably need leadership that connects project issues to other organizational and institutional needs. Major projects and programs, for example, often require significant leadership skills in managing strategic institutional issues such as joint venture arrangements, addressing politicians and regulators, and influencing stakeholders. In the military, generalship involves developing and implementing a strategy for the prosecution of objectives set by others (politicians) and is a natural outgrowth of an officer's training and career development. Why shouldn't the same argument apply for project and program management? Doing so means, *inter alia*, understanding (and acting) the management challenges at all three levels.

### Conclusions

This article has suggested a three-level framework, foreshadowed by Parsons' "levels of rational action," for conceptualizing the management activities needed to develop and deliver projects successfully. The first two levels, the technical and strategic, operate within the project—*technical* representing the delivery-execution core, and *strategic* setting up this core (the project) and shielding it from environmental disruption. The third, the *institutional* level, is outside and around the project. Managing within this third level is to work *on* or *for* projects; managing at the other two levels is to manage *in* them.

We have explored examples of how institutional issues shape the project management domain and have suggested a number of research issues and

opportunities at this level. This includes, but is not limited to, the understanding and development of organizational capabilities; roles of the sponsor and governance; project ecology; contracting and resourcing strategies; and working on sets of projects, as in portfolio management, supply chains, and project management communities such as craft groups or the professions.

Central to effecting much of this is leadership. Leadership is important at all three levels, but at Level 3 it has a particularly strong role in steering the interaction between a context that shapes management and a management that shapes context. Practically, we see leaders growing as they experience increasing responsibility. Addressing and enlarging the development of project leaders would, we contend, as an institutional act, make a substantial impact on most organizations' performance and practices. We also suggest the need for other senior leaders (not necessarily only project leaders) within the organization to recognize and have experience in project management in order to understand its complexities and be in a better position to develop a context *for* projects.

The prize is that by seeing the institutional level more clearly as a separate area of enquiry, we will understand more fully how we can improve the performance of projects. Then those working at Levels 1 and 2 will be able to see more clearly how their work is conditioned, constrained, and supported by the environment around them. Creating a supportive institutional context for projects and its management to flourish is at the heart of what Level 3 is about. ■

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