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SHARING

**BRINGING VALUES ON THE ROAD:
VALUES-BASED INTEGRAL INITIATIVE AND
PROJECT MANAGEMENT (VIPM)**

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Hendrik Backerra,

Hendrik Backerra Consulting GmbH, Founder
Germany, hb@hendrikbackerra.de

Robin Aden,

MHP, Project Manager, Germany,
robin.aden@mhp.co

Clemens Drilling,

newTrust srl, Managing Partner, Initiator/Founder of
pm4future.org, Germany & Italy,
clemens.drilling@newtrust.de

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Since strategic initiatives and their associated projects serve as the major vehicle through which transformation is delivered, we need to increase their success rate by radically changing the way we operate them.

We recommend establishing an integral initiative and project management (PM) system that is people-centered, based on values such as integrity, sharing, and trust, and that, as a symbol of solidarity, both advances the goal of saving our planet and ensures prosperity for the global community.

Global Challenge

Our planet is in crisis. Earth's Overshoot Day in 2021 fell on July 29th. "Up to 30% of all mammal, bird and amphibian species will be threatened with extinction this century" (Rockström, Steffen, and Noone 2009).

Climate chaos, mass poverty, mass migration—we have entered an Age of Disruption (Scharmer and Kaufer 2009).

Based on the Sustainable Development Goals (SDG)—decisions that are crucial for the survival of the global community—numerous strategic initiatives, their project portfolios and countless programs and projects promise to deliver respected results. Thus, initiatives and projects are the major vehicle through which strategic change is delivered (Mansell, Simon, and Plodowski 2019).

However, more than 50% of all projects carried out globally either do not deliver expected results (PMI 2019), and despite several publications (Gavlin,

Tywoniak, and Sutherland 2021; Ellmann and Månsson 2009), both portfolio and project management (PM) are far from being sustainable. In fact, there is hardly any common understanding regarding a "sustainable" portfolio and project management, despite some promising attempts (Jaes and Faganel 2013; McManus and Cacioppe 2011; Silvius et al. 2017). The reasons for this significant rate of project failure highlight the challenges we face. Well-established project management principles are based on yesterday's mindsets, a top-down approach to budget, scope, time, and leadership (Silvius et al. 2017). They lack long-term accountability. Decisionmakers focus on on-time completion and cost control as their benchmarks, yet they are hardly willing to value engaged people and evaluate the impact of project completion. Even though we know that the success of projects depends significantly on the quality of leadership, project management is mostly used as a methodological toolbox, not as a leadership concept.

Stakeholder issues are treated superficially in the PM standards. Putting stakeholder issues in the context of sustainable development requires a paradigm shift in values. Instead of today's management-of-stakeholders approach (i.e., making stakeholders comply with project needs), a management-for-stakeholders approach may be beneficial (Eskerod and Huemann 2013). The global challenge is to engage all stakeholder groups by bringing organizational values together with human values and balancing them with the structures, processes, and desired project outcomes.

Project management is often based on the human image in Theory X, with its strictly hierarchical decision-making and command structure (Richardson and Jackson 2019). Differences in the objectives of individuals, in cultural customs, or in the tools used in day-to-day business are not valued for their potential and are often not even acknowledged.

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Traditional project management offers hardly any concepts around participative decision-making or processes for problem-solving, self-organization, and self-responsibility.

The term sustainability is thus only used for organizational learning from past to future projects. Social indicators derived from SDGs; Environmental, Social, and Governance (ESG); Corporate Social Responsibility (CSR); or other sustainable indicator systems such as the European Union (EU) taxonomy or the one proposed by Green Project Management (Carboni et al. 2018) are almost completely absent in everyday project life. Tharp emphasizes that “sustainability isn't just being ‘green,’ and being aware of our impact on the environment. We also need to evaluate the risks related to labor practices, human rights, fair business dealings, and consumer issues” (Tharp 2012).

Global Solution

In the third millennium, we humans have the opportunity to unfold an interplay with the living planetary habitat that is organismic and future-strengthening. It is now a matter of transforming the old and creating a new culture that places a deep integration of humans and nature in the process of living at the center of our orientation (Dahm 2019).

The authors propose a values-based integral initiative and project management (ViPM), a new approach which overcomes the challenges of traditional project management and greatly increases the rate of project success. ViPM can contribute significantly to the implementation of the SDGs.

ViPM Is a Values-Based Initiative and Project Management Approach

The G20 agenda presents a complex global challenge that can only be met through global cooperation. The G20 brings together stakeholders from diverse societal cultures who sometimes have different personal values. This can lead to different perceptions and

interpretations of, for example, sustainability. When these different cultures, values, and strengths are put into action under the umbrella of shared values with a common focus, new benchmarks are set.

ViPM appreciates the opportunity for understanding individuals' diverse values. ViPM follows McGregor's Theory Y leadership attitude (McGregor 1960) and assumes that people are internally motivated and work to better themselves without seeking a direct reward in return. People are one of the most valuable assets to a project. They tend to take full responsibility for their work and do not need close supervision to create quality results. A values-based integral initiative and project manager defines leadership as a facilitative task, one of removing obstacles in the way of the team rather than telling them the “truth.” The ViPM leader understands the uniqueness of individuals and the diversity of their value systems. The concept of spiral dynamics is used to understand team members and as an aid to the respectful recognition of the other during joint work. Spiral dynamics is an extremely useful concept to apply in analyzing stakeholder environments (Drilling 2019).

Empirical Insight: Shared Values Boost Collaboration of the ECO City Initiative.

The ecological initiative ECO City-International Campus Wünsdorf encompasses more than twenty programs and numerous projects. In parallel to the work on the portfolio design in 2020, the international team shared their individual values and ran several dialogue sessions, resulting in a committed to a common set of values: respect, sharing, integrity, and freedom. Those shared values boosted team performance significantly.

ViPM Redefines Success

Projects are not only responsible for short-term output and delivering agreed upon goals, but also for the medium-and long-term effects of their results. This adds to the traditional success criteria— adherence to schedule, budget, quality—criteria for sustainability, such as the

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“triple bottom line,” people, planet, prosperity. In the future, the criteria of values and cultural orientation will play a significant role in determining project success. The triple bottom line can link SDGs to normative project success criteria (Mansell, Philbin, and Plodowski 2019). Visualized, the iron triangle of traditional project management becomes the sustainability diamond of ViPM.

ViPMActs in Four Dimensions Mindset, Culture, Knowledge, and Tools

As a game-changing initiative and project management approach, ViPM renews governance principles and emphasizes values-based, sustainable project design and project execution, which connect the four-dimensions mindsets, individual skills, collective skills, tools, and cultural work (Barrett 2017), and is therefore called as integral.

ViPM evolves to team facilitation, where balancing conflicting expectations due to different mindsets in mutual respect becomes a key part of any values-driven initiative and project.

The management-for-stakeholder is at the center of ViPM. Getting things done in multi-cultural environments requires new models for collaboration such as sociocracy, deep democracy, and holarchy, where project teams and stakeholders are empowered to solve problems and co-create in the decision-making processes.

Future collaboration uses well-equipped physical and virtual spaces. Digitized processes, platforms, and communication devices foster collaboration on a global level. To use those supporting technologies most effectively, teams must develop a respectful collaboration.

Inclusive stakeholder management and multi-stakeholder partnerships establish a culture of trust as a key enabler for speeding up projects and fostering integrity and sharing.

The Integration of Sustainability Is at the Core of ViPM

Following Silvius and Schipper (2014a, 2014b), we define sustainable project management as the planning, monitoring, and controlling of project delivery and support processes, while considering the environmental, economic, and social aspects of the project lifecycle’s resources, processes, deliverables, and effects. Sustainable project management seeks to realize benefits for stakeholders and ensure performance in a transparent, fair, and ethical way that includes proactive stakeholder participation.

Sustainability in initiative and project management comprises the following three specific areas.

Sustainability regarding the Project Objectives.

Traditional project design focuses only on cost, quality, and time. A values-based integral project management considers social and ecological dimensions in project scoping and delivery (Bozesan 2020).

Sustainability in Project Management explores the questions surrounding the integration of concepts of sustainability in projects and project management, and it provides valuable guidance and insights. Sustainability relates not only to multiple perspectives—economic, environmental, and social—but also to responsibility and accountability, and values in terms of ethics, fairness, and equality (Silvius et al. 2017).

The social dimension comprises desired mindsets and values crucial to live out while implementing the project, using proven frameworks like the cultural values assessment from Barrett: the well-being of the project team and the stakeholders, the diversity of the project team, and the mobility of disadvantaged groups in the team.

The ecological dimension, e.g., SDG goals focused on in a project (also factoring in the indirect cost of emissions, the impact of the activities on biodiversity, and the use of resources) use frameworks like the “doughnut economy.”

Sustainability of the Project’s Production

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Process. Independent of their scope, projects are sustainable regarding their use of materials, machines, tools, or production processes. This encompasses human rights, fair labor conditions, and no environment pollution or waste. A sustainable focus recognizes the interdependence of organizations and the broader society and encompasses the following:

Human rights: opposing discrimination against vulnerable groups, civil rights, and fundamental rights and principles at work;
Labor practices: conditions of work, health and safety, and development and training;
The environment: sustainable resource use and reuse (circular economy), pollution prevention, and climate change mitigation;
fair operating practices: anti-corruption, fair competition, and respect for property rights;
consumer issues: fair contractual practices, dispute resolution, and fair marketing; and
Community involvement and engagement: employee training and skills development, wealth and income creation, and community involvement.

Sustainability of the Project Management

Process. Based on a people-centric attitude, these projects operate with a facilitative leadership style, using a holistic, multi-stakeholder approach, and participatory decision-making. They create values-based collaboration, focusing on trust, self-organization, accountability, and transparency. The benefits of group decision-making have been widely publicized: better thinking, better buy-in, better decisions.

Final Thoughts

Initiative and project managers have to cope with new challenges in an increasingly complex world. The strength of the spiral model applied to project management is its recognition of the multidimensional nature of PM and provision of tools for problem resolution targeted to each specific level. The project moves from prejudice-based human interactions with pre-ordained outcomes—the so-called win-lose

model—to an open-minded approach that strives for results by building on the resources that the broad range of stakeholders bring along with them, at times without even being aware of them (Ellmann and Månsson 2009).

Integrated analysis and inclusion of the stakeholder is key. This includes identification of stakeholders and deep understanding of the mindset, values system, and needs, followed by action planning to balance both stakeholder and project needs.

The Integral Project Management Framework

To truly achieve the SDGs, a more developed project management must be used globally with a high degree of penetration into projects, that (1) systematically includes the project environment, (2) can respond quickly and adaptively to change, (3) supports project teams in developing cooperation, (4) understands the diversity of individuals in projects as potential and create a culture that consistently uses the diversity of values.

The integral project management approach provides a framework for doing this by integrating four key elements:

1. The project lifecycle, which creates urgency, focuses resources, and identifies the level of effort required at the defining, planning, executing, and delivering stages of a project.
2. An integral perspective, which includes four perspectives of reality, including personal, cultural, behavior, and skills and systems, all of equal importance to successful leadership and management of a project.
3. The five levels of integral project management, which provide a clear way of evaluating the project in terms of how well the integral four quadrants are being implemented.
4. Eight elements and three catalysts required for successful implementation of a project. If one or more elements or catalysts are missing, then the likelihood of achieving successful projects is reduced (McManus and Cacioppe 2011).

Policy Recommendations

We recommend establishing a G20 values-based integral initiative and project management

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(ViPM) on all levels, from vision to lessons learned. This provides a great opportunity to achieve the SDGs on time.

1. Redefine success for initiatives, portfolios, and projects. Success from a sustainability perspective means taking into account the ecological, economic, and, above all, social environments and doing people-centered work. Formulate success criteria in five categories: Planet, People, Prosperity, Peace, and Partnership.
2. Create a ViPM standard and framework. Create a standard as the normative basis for undertaking future initiatives, programs, and projects. This will include a code of ethics. Set up a ViPM framework by updating the existing codes, interweaving technical project with people-centric measures. Establish a participatory portfolio and project design process.
3. Establish a G20 ViPM office to implement this new approach in current and future strategic projects. This office will map governmental and private sector efforts, collect intra-need assessments, analyze globally required financial and non-financial resource allocation for execution, and support the initiation of a few pilot benchmarking approaches to set examples for the rest. The office can also be a node for building a platform for resource funding mechanisms globally. Collaborate with UNOPS.
4. Establish an ViPM education, certification, and assessment system for the worldwide transfer of knowledge about ViPM that also collects, and shares experience and best practices gained from the projects that have been carried out. Create a ViPM certification body to assure future initiative directors, portfolio managers, and project leaders carry out high-quality ViPM.
5. Create a global ViPM community by connecting and expanding existing networks of traditional project management and the integral field. Empower next-generation project managers by actively participating in this global community. Set up a viable communication platform to strengthen collaboration and sharing.

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