

Transformational Organizational Change as Projects: Exploring the Actions Taken by Project Managers When Leading and Implementing Change

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Abstract

The use of a project concept in implementing organizational change is an emerging perspective in the literature. A recent study examined the roles and skills of project managers involved in first-order change and compared them to existing competencies for managing change. However, limited research has examined the actions taken by project managers engaged in leading and implementing second-order, transformational change. Therefore, to address this shortcoming in the literature, we propose a qualitative single-case study design to better understand the actions of project managers during a second-order transformational change project. Semi-structured interviews will be conducted to address the following question: What are the actions taken by project managers when leading and implementing a transformational change initiative? The study will be underpinned by Lewin's (1947) and Kotter's (1996) change theories. We anticipate that the findings will provide insights about the actions taken by project management practitioners and will augment knowledge on the integration of project management and change management actions within a transformational change context.

Keywords: Project Management, Project Management Actions, Transformational Organizational Change, Second-Order Organizational Change, Project Management Professional Standards, HRD and Project Management Connection

1.0 INTRODUCTION

The concept of organizational change and the leadership skills required to implement such change have been a major concern of business leaders and academic researchers in recent years (Gilley 2005). Organizational change initiatives are often categorized according to types: organizational learning, further developing, transforming, and radical new-positioning (Gareis 2010). Levy and Merry (1986) introduced the concept of two degrees of organizational change: first-order and second-order. First-order changes are less dramatic, and often incremental in nature (Gareis 2010). In contrast, second-order changes are transformational and possibly lead to a new organizational identity. Levy and Merry (1986) summarize the essence of second-order change as follows, using this definition to describe organizational transformation: "Second-order change (organizational transformation) is a multidimensional, multi-level, qualitative, discontinuous, radical organizational change involving a paradigmatic shift" (p. 5)

Organizations continue to operate in a chaotic global business world, and therefore organizational changes representing first and second-order degrees of change will continue to be a major focus of company endeavors for organizational members (Cicmil 1999). However, as Burnes and Jackson (2011) state, there is evidence that as many as 70% of change initiatives fail. According to Cicmil (1999), utilizing a project concept in organizational change initiatives is an emerging perspective which may influence the outcomes associated with organizational change. Turner and Cochrane (1993) define projects as endeavors in which resources are organized so as to achieve unitary, beneficial change. In her 1999 study, Cicmil presented empirical evidence indicating that many contemporary organizations implement change as a project. Modern organizations embrace four distinctive categories of projects: 1) engineering, 2) new product development, 3) system development, and 4) organizational change projects (Cicmil 1999).

In a qualitative multi-case study, Crawford and Nahmias (2010) studied three organizations using semi-structured interviewing to provide insights into the role of project managers and change managers in the implementation of organizational change. The three case study organizations were first-order information technology change initiatives. The purpose of their study was to research the role and skills of project managers in relation to existing competencies for managing change, and to compile comparable sets of competencies for project and change managers. While there is some recent research literature related to project management and change management competencies in first-order organizational change initiatives, less is known about the actions taken for second-order, transformational change initiatives (Crawford & Nahmias 2010). Accordingly, we have designed our study to address this gap in the literature related to actions taken by project managers in leading and implementing transformational change initiatives.

1.2 Purpose of the Study

According to Carden and Egan (2008), although the use of successful project management skills, tools, and strategies is an emerging solution for human resource development (HRD) implementations, there are few empirical or theoretical investigations that have been conducted examining the impact of project management for HRD. Carden and Egan conducted a detailed, systematic review of the literature on the HRD and project management connections. Because of the absence of research and theory associated with project management and HRD, they acknowledge that practice of project management in HRD contexts, including the context of organizational change initiatives, is not well established and is an area requiring more research. Therefore, the purpose of this proposed qualitative study is to explore the actions taken by project managers leading and implementing second-order, transformational change efforts. It is anticipated that the study will enhance the understanding of organizational change within the HRD, project management, and change scholarly literatures and will articulate the actions taken by project managers when leading and implementing transformational change initiatives in organizations.

1.3. Conceptual Framework and Research Question

Our study will use the three-phase change model developed by Lewin (1947) as a theoretical underpinning. This change model is based upon three sequential steps in a change initiative: un-freezing, moving, and re-freezing (Lewin 1951). Gareis (2010) applies the Lewin change model to the processes of the organizational change type, “transforming”, and develops a practical three-stage process for transformation: planning the transformation, implementing the transformation, and stabilizing the organization. Ford and Greer (2006) identified a set of change process factors linked to Lewin’s three phases. Goal setting was identified as a measure of unfreezing. Skill development was identified as a measure of movement. Feedback and management control were identified as measures of refreezing. Kotter (1996) provides a conceptual framework for the study with his eight stage process for leading change: 1. establishing a sense of urgency, 2. creating the guiding coalition, 3. developing a vision and strategy, 4. communicating the change vision, 5. empowering employees for broad-based action, 6. generating short term wins, 7. consolidating gains and producing more change, and 8. anchoring new approaches in the culture. We will use these models to inform our study to answer the following research question: What are the actions taken by project managers when leading and implementing a transformational change initiative?

2.0 LITERATURE REVIEW

Exploring the actions taken by project managers in leading and implementing a transformational change initiative is the focus of this study. Therefore, this literature review will be organized into the following sections: description of the literature identification process, organizational change, project management theory, project management connections to organizational change, and project management professional standards and competencies. The review will conclude with an overall summary.

Sources for the literature review were generated using a variety of databases including Google Scholar, Proquest Database (Dissertations and Thesis), Business Source Complete, Emerald, and ABI Inform. Search terms included organizational change, transformational change, HRD and project management, project management and change management, project management theory, project management competencies, and project management and transformational change. The search for relevant sources began in September 2011 when research for the topic of interest relative to project management competencies and organizational change commenced.

2.1 Organizational Change

The foremost driver of change in any organization is to become more successful in the increasingly competitive business environment. Therefore, the basic goal of organizational change is the same in most companies (Kotter 1995): “to make fundamental changes in how business is conducted in order to help cope with a new, more challenging market environment.” (p. 59). Levy and Merry (1986) introduced the concept of two types of organizational change: first-order and second-order. First-order changes are less dramatic, and are incremental in nature. Second-order changes are multi-dimensional and radical changes to the organization, leading to a new identity (Gareis 2010). Although the change models are currently used as the framework for organizational changes, they are very general and may lack specificity about how the change process actually needs to occur.

Gareis (2010) applied action research to define change types, change objects, and for the description of changes within organizations, and developed models for change management by projects and applied those as practical solutions for those organizations. In the study, change types were categorized as organizational learning, further developing, transforming, and radical new-positioning. Gareis posits that change phases, or chains of processes, are

needed to describe each change type, and that the boundaries of the organization to be changed and the change type will determine the processes needed for the change.

Although change is necessary in organizations in order to survive, the success rates of change initiatives continue to be low. One-half to two-thirds of major corporate change initiatives are deemed failures (Gilley 2005). Organizational change initiatives continue to fail in alarming numbers. According to Miller, "the corporate landscape is littered with failed efforts at organizational change initiatives." (Gilley, Callahan & Bierema, 2003, p. 49). Many studies report a high failure rate of 70% or above (Beer and Nohria, 2000; Brodbeck, 2002; Burnes, 2004; Styhre, 2002). According to Strebel (1996), employees and organizations have reciprocal personal compacts, including obligations and mutual commitments. Change efforts will fail if these compacts are not revised as part of the change. Hayes (2010) addresses reasons why change initiatives fail due to resistance in organizations. These reasons include stakeholder focus on their own interests, misunderstanding and lack of trust, differing assessments of the need for change, and concerns over not being able to acquire the skills needed to successfully implement the change.

All organizational change requires attention to three central areas: content, people, and process (Anderson & Anderson 2011). The content of change is "what" is going to change, including structure, systems, and products. "People" refers to the human side of change, while "process" refers to how the content and people changes will be planned and implemented (Anderson & Anderson 2011). But simply being responsive to change is not enough. Companies and their employees must be proactive and prepare for future changes. Firms that are able to anticipate or drive change prove to be more viable in the long run (Gilley 2005).

The concept of organizational change has a large research foundation that dates to as early as 1947 with the work of Lewin (Gareis 2010). Lewin introduced concepts that support organizational change: Force Field Analysis and the Three-Stage Model of Change. The concept of Force Field Analysis is that status quo is the result of driving and resisting forces. The Three-Stage Model introduces the steps involved in change: unfreezing the current situation, moving, and refreezing the new status quo. Kotter (1996, p. 61) introduced a change model consisting of "eight steps to transforming your organization". The eight steps include: 1. establishing a sense of urgency, 2. creating the guiding coalition, 3. developing a vision and strategy, 4. communicating the change vision, 5. empowering employees for broad-based action, 6. generating short term wins, 7. consolidating gains and producing more change, and 8. anchoring new approaches in the culture.

Burke (2011) puts forward twelve areas that must be analyzed as part of the planned change process: external environment, leadership, mission and strategy, organization culture, management practices, structure, systems (policies and procedures), work climate, motivation, task requirements, individual needs and values, and individual and organizational performance.

2.2 Project Management Theory

To explore the actions taken in leading and implementing transformational change, it is important to understand the definition of a project, project management models, and project management theory. Many researchers, practitioners, and professional organizations have defined the term "project". According to the Project Management Institute (PMI 2008), "a project is a temporary endeavor undertaken to create a unique product, service, or result" (p. 5). Kerzner (2001) defines project management as short-term and with specific objectives. There has been a long-standing debate in the management education community as to whether "project management" is a practice or an academic discipline (Kwak & Anbari 2009). In traditional industry fields, the tools and techniques of project management have been applied successfully to complete complex projects. These traditional fields include construction, engineering, and manufacturing. However, when it comes to the business and management field, the origin, history, and evolution of project management and its theoretical foundations have been debated and studied to a limited extent, although project management has existed for hundreds of years and was practiced in early civilizations. In terms of theory-building and the theoretical basis of project management, there is still much room for improvement (Kwak & Anbari 2009).

Project management models typically are used to control, track, and implement phases, steps, or patterns. Models provide structure and organization for scheduling, performance tracking, communication, and management activities within projects (Carden & Egan 2008). Carden and Egan maintain that project management is an evolving field of study and as such does not have a fully established theoretical background.

According to the review of project management theory performed by Carden and Egan (2008), there are seven theoretical perspectives associated with project management gleaned from the literature. These seven perspectives include: neoinstitutional organization theory, action in project theory, queuing theory, knowledge flow, temporary organization, a resource-based view, and transformational-transactional leadership. These frameworks of project management theory may be the basis for future opportunities for project management theory building and research (Carden & Egan 2008).

2.3 Project Management Connections to Organizational Change

The literature notes that successful project management is vital to successful change initiatives, yet there is little empirical and theoretical research done on the use of project management in change initiatives (Gilley, et al. 2002, Carden & Egan 2008). Carden and Egan (2008) address the shortage of connections in their detailed and systematic study of the literature to uncover connections between the topics of (HRD) and project management. In a series of case studies, Cicmil (1999) provided empirical evidence showing that many contemporary organizations consider the implementation of change as a project. The empirical evidence for this research was derived primarily from three case studies involving first-order changes that were not transformational in nature. Lehmann (2010) introduces the concepts of the “mineral” (focus on clear methodology with well-defined phases) and “organic” (creative and sense-making, with efforts on collaboration) approaches to organizational change as projects. Recent and various other studies have been performed to delineate the differences between change leadership and change management (Griffith-Cooper 2007), and to highlight the need to utilize change management and leadership skills within projects for successful implementation (Lavasseur 2010; Müller & Turner 2010; Lloyd-Walker & Walker 2011; Keegan & Hartog 2004; and Cowan-Sahadath 2010).

2.4 Project Management Professional Standards and Competencies

A Guide to the Project Management Body of Knowledge (PMBOK Guide), introduced in 1986, is the recognized standard for the project management profession. It is published by the Project Management Institute (PMI), a professional organization formed in 1969 dedicated to the discipline of project management. According to the PMBOK Guide, 4th Edition (PMI 2008, p. 6), “project management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.” Managing a project typically includes identifying project requirements, addressing the needs and concerns of the stakeholders during the project, and balancing the competing constraints of the project, which include scope, quality, schedule, budget, resources, and risk. (PMI 2008). Projects are a means of achieving organizational goals and objects within the context of the strategic plans. Projects are authorized as a result of many strategic change considerations, including market demand, strategic opportunity, customer request, technological advance, and legal requirements or compliance.

Although the nature of project management is rooted in change, all areas of the PMBOK Guide, 4th Edition (PMI 2008) are relative to controlling change within the project, and do not address the human elements of leading change initiatives. In a 2007 study, Griffith-Cooper and King outline the differences between the technical aspect of controlling change to scope within a project, and managing the human aspect of leading the human dimensions of a project, or change leadership. This aspect promotes project success by guiding those stakeholders affected by the project through the stages of change. Griffith-Cooper and King (2010) propose the inclusion of an additional PMBOK knowledge area to address project management change leadership.

The objective of the standards for project management is to increase the competencies of project managers and thereby increase the rate of success for project undertakings. The Project Management Competency Development Framework (PMI 2002) identifies a comprehensive list of knowledge and performance indicators including personal competencies crucial for project management success in addition to the application of project management knowledge. In 2002, Crawford compiled aspects of project management competencies by grouping and ranking them according to how many times these competencies were mentioned across a number of research studies (Crawford 2002). The results identified the emergence of 24 competencies important to project management performance, including knowledge, skills, and personal attributes. Crawford and Nahmias (2010) later updated these results with additional studies and data from five project management standards, including the ICB (International Project Management Association, 2006), APMBOK (APM 2006), PMBOK Guide (PMI 2004), and GAPPS standards (GAPPS 2007). The purpose of this particular study was to research the role and skills of project managers in relation to the competencies for managing change, and derive comparable sets of competencies for project and change managers. In addition, a qualitative study involving three successful first-order organizational change initiatives was performed. The change initiatives in this study “were chosen on the basis that there was successful implementation as perceived by the sponsor” (Crawford & Nahmias 2010, p. 408). A major contribution of this study indicated that project managers, contrary to much research on the topic, “do not necessarily have the required competence or perform the full activities required to promote and implement the changes that they are leading as part of their projects.” (Crawford & Nahmias 2010, p. 410). The specific case studies analyzed in the Crawford and Nahmias study support this view.

Continuing in the theme of project management competencies for leading change initiatives, recent studies have examined the leadership competency profiles of successful project managers in different types of projects. In one such study, Müller and Turner (2010) performed a quantitative study investigating leadership profiles across several project management professional organizations utilizing comprehensive project leadership questionnaires.

Ten project success criteria were used in this study including: end-user satisfaction with the project's product or service, suppliers' satisfaction, project team's satisfaction, other stakeholders' satisfaction, meeting the project's overall performance (functionality, budget, and timing), meeting user requirements, meeting the project's purpose, client satisfaction with the project results, reoccurring business with the client, and meeting the respondent's self-defined success factor. The study results included project manager profiles for importance and strength in leadership competencies in different types of high performing projects, including engineering and construction, information and telecommunication technology, and organizational change. According to the study, project managers of the most successful organizational change projects are strong in all competencies, but the results of the study only partly support the hypothesis that "there are differences in project manager leadership competency profiles in some different types of successful projects." (p. 443).

In another such study, Fisher (2011, p. 996) reviewed the literature to reveal the answer to a research question: "What are the most important skills practitioners consider make an effective people project manager?" Fisher's study highlights the current project management research on the importance of project management for today's changing work environments. It also acknowledges that projects are a powerful way to implement change in organizations.

3.0 RESEARCH METHODOLOGY

3.1 Design of the Study

We propose a qualitative single-case study of a successful transformational change project within an organization to examine the competencies of project managers assigned to lead the change process. The initial step for identifying a case study organization will be through a survey of project managers on the Project Management Institute website. Project managers will be asked to respond if they have lead a transformational change for their organization and are willing to be contacted regarding the project. We will ask open-ended questions about how project managers define success. Although we anticipate that such things as completing the change initiative project within timelines and within budget, as well as the perceived quality of the change implementation will be common across all cases, we will analyze the responses for the themes that emerge. We will then seek input from the project sponsor for those organizations that seem to fit our criteria of a successful transformational change initiative lead by a project manager.

As in the Crawford and Nahmias (2010) study, the criteria for success will be based on the perception of the project sponsor. Upon selection of a case study organization, we will purposefully select study participants. We will use a semi-structured interview process. Interview questions will be designed to gather data about the actions that were considered to be successful during the change process. Interview responses will be analyzed for components of unfreezing, moving, and refreezing as well as establishing a sense of urgency, creating the guiding coalition, developing a vision and strategy, communicating the change vision, empowering employees for broad-based action, generating short term wins, consolidating gains and producing more change, and anchoring new approaches in the culture. Semi-structured interviews will be conducted with the project sponsor, the project manager, a project team member, and a stakeholder affected by the change initiative. Interviews will be transcribed and coded to identify themes across respondents regarding the actions required of project managers during the change initiative. External reliability will be limited by our small case study size.

3.2 Population/Sample

To identify a suitable case study organization, project managers will be surveyed through the Project Management Institute to determine possible organizational settings for consideration. First, project managers who respond via the survey that they were assigned to lead a transformational change initiative and are willing to be contacted will be identified. The case organization will be purposefully obtained by contacting project sponsors to verify that sponsors perceive the change project as successful. Additional selection criteria include that the project manager is still employed with the organization that underwent successful transformational change and consent to conduct the study can be obtained from the project sponsor. Finally, participants that include the project sponsor, the project manager, a project team member, and a stakeholder affected by the change initiative will be selected based upon their availability to be interviewed and willingness to having the interview recorded.

3.3 Instrumentation

A draft of the semi-structured interview questions is available in Appendix A. The questions are designed to focus on the aspects of the transformational change that were successful. The interview guide (questions) will be made available to interviewees and other interested parties in advance. Because the initial identification of transformational change will be made by a project manager whose perceptions may differ from the other members of the organization who will be interviewed, care will be taken to protect the confidentiality of interviewees. Approval of the university

advisor will be obtained to ensure this portion of the study meets qualitative case study research standards. The university policies for acquiring Institutional Review Board (IRB) approval will be followed.

3.4 Data Collection Approaches/Procedures

Depending on the geographic location of the organization selected for the case study, interviews may be conducted face to face or in an online videoconference format. Recordings will be secured in locked storage and all results will be reported confidentially. However, there are limitations to confidentiality in a study with few participants. Any employee of the organization might be able to identify the respondent in a published report that is accessed by the organizations employees. We will accordingly endeavor to mask the organization and participants using pseudonyms.

3.5 Data Analysis

Interviews will be recorded, transcribed and coded to identify themes across respondents that may inform the competencies required of project managers during a transformational, second-order change process. In order to reduce coding error, at least one interview transcription will be coded first by both researchers to ensure consistency in approach and procedures used in coding decision-making.

3.6 Reliability and Validity

Validity and reliability in the qualitative paradigm refer to how well our research findings reflect reality and the extent to which findings can be replicated and applied to other situations. To address issues associated with internal validity, we will use triangulation of sources as reflected by the incorporation of various stakeholders (i.e., sponsors, project managers, etc.). We will use member checking and peer examination and will articulate any biases that we may have at the onset of the study. From a reliability standpoint, we will therefore engage in providing an audit trail and will offer rich, thick description so that others can better determine how well the research situation may match their own.

3.7 Limitations

Sample size is an anticipated limitation of this case study design. Additional unanticipated limitations of the design and/or results may reveal themselves as the research project unfolds. This study is not intended to be generalizable but may have practical utility for project managers and HRD practitioners based upon the thick, rich descriptions that may enable such professionals to assess the extent to which findings may be useful in their contexts.

4.0 CASE STUDY SUMMARY AND CONTRIBUTION TO NEW KNOWLEDGE OF HRD

This study is designed to answer our research question: What are the actions taken by project managers when leading and implementing a transformational change initiative? It will be important to select an organization having undergone a successful transformational, or second-order, change initiative. Interviews with project sponsors, project managers, project team members, and stakeholders affected by the change will identify the actions taken by the project manager(s) to lead and implement a transformational change initiative.

The proposed research will offer contributions to both scholars and practitioners. First, the findings will begin to fill the research gaps on successful project management on transformational change initiatives. Second, it may suggest a taxonomy of actions or sets of actions for practitioners that will augment existing knowledge on the integration of project management and change competencies within a transformational change context.

4.1 Doctoral Workshop Discussion Issues

It is our intent to gain insights from our colleagues on the overall rationale and purpose of the research, the design of the study, and the articulation of criteria associated with a successful transformational change initiative, along with the purposeful selection of study participants.

We are particularly interested in the following topics that are specific to certain areas of the study:

- Feasibility of our focus on exploring actions of project managers leading and implementing second-order change initiatives when limited competencies are found at the level of first-order change and when 70% of change initiatives fail.
- Choice of theories/models underpinning our study.
- Selection criteria for more adequately defining “success” and considerations involving the selection of one or more successful change initiatives for the study.

5.0 CONCLUSION

The notion that project management is important for the implementation of organizational change initiatives is a recurring theme throughout this literature review. Although we found much historical and recent scholarly research and theory relevant to change process models and organizational change concepts, we still see significant failures in change initiatives in organizations. We reviewed very current (2008 and forward) literature relevant to recent studies that integrate project management and organizational change, offering empirical evidence that change implementations are considered as projects. We also reviewed literature indicating the associated project management competencies needed for first-order change initiatives. We have determined that more empirical and theoretical evidence is needed to support the connection between project management and second-order, transformational change initiatives.

Our review of project management theory reveals project management, from ancient times, has been considered a practice. Debate continues among practitioners and researchers as to whether project management is a practice or an academic discipline. In some fields, project management tools and techniques have long been used to achieve successful results in projects. Our literature review reveals a need and opportunity for theory building in project management and for more empirical research on project management and organizational change.

Our literature review uncovered various practice standards in place for project management professionals, with the recognized standard being the PMBOK, 4th Edition (PMI 2008). Other standards include: ICB (International Project Management Association 2006), APMBOK (APM 2006), PMBOK Guide (PMI 2004), and GAPPS standards (GAPPS 2007). We found in the literature that the existing practice standards, project management theory, and research evidence do not address those skills needed for project managers to lead organizational change affecting stakeholders, or the human element of change. The proposed study will contribute to project management practice by exploring the actions taken by project managers in leading transformational organizational change.

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