



Road to Chartered series: paper 10

APM as a chartered body

Supporting the journey of
chartered project professionals

**THE CHARTERED BODY FOR
THE PROJECT PROFESSION**

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1. Foreword

APM became a chartered body in 2016 and is on a journey to become a modern, 21st-century professional body. This process includes the creation of the Chartered Project Professional (ChPP) designation and the Register of Chartered Professionals in 2018.

This series of thought-leadership papers centred on chartered themes was conceived last year to support the need to develop APM's thinking and the debate across the membership on the building blocks needed for the profession; and to support the year-long process consultation on the standard and the support and governance structures needed to launch the register.

Understandably, many practitioners were eager to start their individual journey to become chartered as soon as possible. However, it was essential that the relevant governance and required guidance that comes with a Royal Charter body be developed and tested after the appropriate consultation.

We are now well down that road, but the intervening period allowed us to use the time well through the publication of these papers, to form ideas about how our profession can develop.

As you will see from the following pages, we have covered a lot of ground – from volunteering to ethics, from research to engaging millennials. As chair of APM, I pledge to keep this debate going after the opening of the register to ensure we build a profession that appeals as a **career of first choice**, which **supports individuals on their chartered journey**, and which ensures the project profession increases its contribution to achieve better benefits and outcomes for the economy and society.

John McGlynn

APM chair

"The series was a signal to the public of the intent of the project profession to play its part in the development of social and economic well-being, both in the UK and globally"

2. About this series

This paper is the final in this series of chartered thought-leadership papers – 'Road to Chartered' – published by APM to help build capacity and thinking as a chartered body. The series, which was a year-long process, sought to provide members with insight into how APM might develop as a chartered body, what this means and, crucially, how members could feed into this evolution. It was also a signal to the public of the intent of the project profession to play its part in the development of social and economic well-being, both in the UK and globally – a contribution that, we believe, has for too long been underappreciated.

More details of the other papers in the series are in section 7 (page 15).

We hope you found the series informative and, whether you are a member, prospective member or interested external stakeholder, that it provided context to this important phase in the development of the project profession. We will continue to publish ad hoc discussion papers related to chartered as the need arises.

3. Introduction – progress on our chartered journey

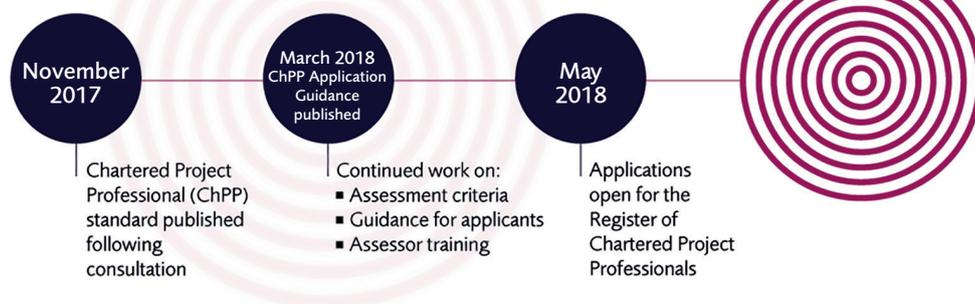
“APM's conversion to a chartered body in legal status was a textbook piece of project management”

This series has provided APM and our members with the opportunity to debate a variety of issues as APM transformed into a chartered body.

The series commenced in April 2017 as APM, having received its Royal Charter formally at the end of 2016, converted to a chartered body in legal status. This was a textbook piece of project management – on time and on budget for the 1 April 2017 transition date!

Throughout 2017, the necessary building for the chartered edifice has been put in place. First, we developed the necessary standard that would underpin chartered, after holding an extensive public consultation launched in summer 2017 and concluded on 30 November (see below). Following this, the timetable was:

Chartered timeline



The consultation



“Feedback during the consultation contributed to significant modifications to the original proposals, ensuring that the chartered standard is both robust and inclusive”

In November, the publication of the final chartered standard was a significant milestone in our chartered journey. The standard is a professional benchmark that demonstrates a defined level of technical knowledge, professional practice and ethical behaviour required to become a Chartered Project Professional (ChPP).

This was published following an extensive and successful consultation, which saw more than 70 per cent of respondents indicating their support and recognition of the standard.

Feedback during the consultation contributed to significant modifications to the original proposals, ensuring that the chartered standard is both robust and inclusive. Changes made following feedback from the consultation included:

- definition of the term “professionally active” to be more inclusive of the range of roles, experience and seniority in the project management profession;
- revision of the number and split of competences to meet the requirements of, and encapsulate the key competences required by, the profession;
- reduction in the length of the written submission in line with other professional bodies;
- revision of the assessment method for technical knowledge for the experiential route.

“ChPP recognises the diverse paths individuals may take to achieving the standard”



APM president David Waboso launched the new standard at the celebration of the Royal Charter for APM, at Speakers House in the Palace of Westminster on 30 November 2017

Assessment process

These revisions allowed us to streamline the assessment process for applicants while maintaining the integrity and rigour of the chartered standard. Drawn from the **APM Competence Framework**, ChPP recognises the diverse paths individuals may take to achieving the standard.

There are three distinct routes:

- **Route one:** for project professionals who have a recognised assessment for technical knowledge.
- **Route two:** for project professionals who have a recognised assessment for technical knowledge and professional practice.
- **Route three:** an experiential route for project professionals who do not have a recognised assessment, but do meet the eligibility requirements.



The next stage of preparation ahead of the launch of the register involved:

- developing the assessment criteria;
- assessor training process; and
- developing the guidance.

This was completed by March, ahead of the opening of the register on 16 May 2018. We hope to create, over the next couple of years, a wave of chartered professionals who will enhance the status and recognition of project management as a profession as delivering effective change to improve our economy and society.

This was the context for the creation of this thought-leadership series. The series has covered a number of themes relevant to a new chartered body and the necessary debate to develop themes of professionalism.

“The series has covered a number of themes we thought relevant to a new chartered body and the necessary debate to develop themes of professionalism”



“We focused on the importance of thought leadership and research, as well as diversity and inclusion, in ensuring we develop project management as a genuinely inclusive profession”

The first paper covered the concept of chartered itself and the next few papers looked at key components of the good professional: volunteering, ethics and continuing professional development (CPD). We then looked forward at how a profession should embrace future developments, looking at the impact of technology and the importance of the millennial generation in shaping change in the workplace and professionalism itself. Finally, we focused on the importance of thought leadership and research, as well as diversity and inclusion, in ensuring we develop project management as a genuinely inclusive profession.

4. The papers in the series – synopsis

i. 21st-century professionalism: the importance of being chartered

What does it mean to be chartered for individual APM members and the wider profession? In the introductory paper, *21st century professionalism: the importance of being chartered*, the history of chartered and the step change for APM to become to a chartered body is set out in more detail, including, importantly, the responsibilities and obligations of a modern project professional.

The paper states that chartered bodies are, above all, bound to protect and promote the public interest, which means that registrants i.e. chartered practitioners must uphold the rules of the charter – including complying with any continuing professional development (CPD) requirements, and abide by a code of professional conduct.

Anyone engaging with, or using the services of, a chartered professional can expect that the person meets the requisite qualifications for that profession; that standards are monitored and kept up to date through CPD; and that there is a robust process in place if things go wrong.

"CPD plays a key part in the toolkit of a professional. Arguably, in this era of constant change and the increasing public expectation of professionals updating their skills, CPD becomes ever more important"

ii. *For the public good? Volunteering in the chartered profession*

Paper two, entitled *For the public good? Volunteering in the chartered profession*, focuses on a theme that APM has always had at its heart: volunteering. The advent of chartered status is an excellent time to look at how we can further increase the value of volunteering and the recognition of our volunteers, as well as develop different and innovative ways of volunteering.

The paper provides a backdrop to volunteering and the value it creates in terms of social capital and more specifically volunteering is central to the professional body as a social network.

The central part of the paper sets out suggested ideas for the development of volunteering in the context of APM as a newly chartered body, including ideas of how to promote greater diversity in volunteering, looking at recognition and rewards and how volunteers can help APM in varied ways beyond the traditional model.

iii. *Demonstrating integrity in a complex world: The importance of ethics in professional life*

APM becoming a chartered body is something to be celebrated, but with this higher profile and status come greater responsibilities for both practitioners and the profession as a whole (and rightly so). This transition offers us the chance to review the component parts of our profession and ensure we modernise and reform where needed.

Professional standards – usually described as knowledge, competence and behaviours (in APM we refer to the five dimensions of professionalism) – are a key foundation for this. Put simply, qualifications equate to the development of knowledge, with CPD providing the keeping up to date and staying competent. But the third leg to this professional tripod is that of ethical conduct and behaviour.

This paper looks at different aspects of ethical behaviour and hopefully can be part of the process for individuals, and the profession as a whole, to engage and understand better the increasing importance of ethics and integrity. This is the starting point for a debate about how APM can develop ethical support and frameworks beyond the code itself. We are grateful to the Institute of Business Ethics, who have done such pioneering work in this field to help develop the content for this paper.

For more information on ethics in project management, view our dedicated ethics pages.

iv. *The growing significance of CPD: Ensuring professionalism*

CPD, or continuing professional development, plays a key part in the toolkit of a professional. Arguably, in this era of constant change and the increasing public expectation of professionals updating their skills, CPD becomes ever more important. This paper looks at the history and trends across professional bodies in recent years. Written by Professor Andrew Friedman of the Professional Associations Research Network (PARN), this paper sets the context for APM and the profession's future journey, concluding on initial thoughts of

how APM as a chartered body needs to adapt and support members – both corporate and individual – in their journey to professionalism using CPD.

As the foreword by Dr Paul Chapman states: "Professional bodies have a crucial role to play in enabling and supporting CPD. This relates to the vital role that professional bodies play in underpinning and justifying public confidence, and ensuring when the public deals with a professional that they can trust and have confidence in the skills of the professional, and that their organisation/firm is at the cutting edge of their profession in terms of the latest knowledge". Commitment to CPD is not only the best way to maintain professional standards, but also to signal a commitment to them.

"As a new chartered profession, we need to address the implications of technology for project management as a whole, and for individual professionals, not only for the benefit of the economy, but also for society itself"

v. The robot professional? The role of project professionals in the digital future

In the fifth paper, we turned to look at the challenges and opportunities that technology may bring to the project management profession, and set out some principles that professionals will need to arm themselves with insight as to the dynamics which successful digital transformation must address for success.

This paper focused on the importance of technology and big data, and the advent of artificial intelligence (AI) and how it might impact our profession, work, society and the economy more generally. As a new chartered profession, we need to address the implications of technology for project management as a whole, and for individual professionals, not only for the benefit of the economy, but also for society itself. "By 2020, it is believed that 40 per cent of incumbent companies will be displaced by digital disruption."

There is no doubt that tomorrow's organisations will be required to move to a state where change and improvement are the only constants, continually striving to keep up with the pace of external change. They will be required to be more agile, value-led, customer-centric, explorative and efficient to remain robust and relevant. Enabling these shifts will require that project professionals become keen champions of digitally enabled ways of working, and not just about using the tools. Digital transformation touches every aspect of the organisation (or at least should to succeed) and, crucially, requires new cross-functional behaviours of adapting, testing and learning.

vi. Professional responsibilities and obligations – the case of the millennials

A key part of the development of the profession of project management, as it evolves to chartered status, is the need to embrace the values and energy of the millennial generation. The sixth paper looks at how millennials can be part of this drive to build a chartered profession.

The paper, drawn up with the help of Dr Effie Konstantinou of University College London (UCL), focuses on the key issues facing the project management profession and, indeed, the leadership and management of organisations and firms more generally. In a few short years, the millennial generation will constitute the majority of the workforce and will be emerging, if they are not already, as the leaders in their field. Therefore, the themes and

“What do we need to do to attract millennials into the profession, to participate and influence developments, and not alienate them by carrying on with existing methods or cultures that inadvertently exclude them?”

values of this group, which Dr Konstantinou identifies so well in this paper, offer two major challenges as we seek to build a project management profession that matches the traditional chartered professions, both in terms of perception and status.

First, how can the current profession absorb and embrace the best of these 'millennial' values into the existing profession to help evolve it? And second, what do we need to do to attract millennials into the profession, to participate and influence developments, and not alienate them by carrying on with existing methods or cultures that inadvertently exclude them?

This paper provides us with food for thought as we consider what elements we need to build our new chartered professional community. If we are to build a new profession, we need to embrace and include the new flow of diverse talent into our ranks.

The paper considers how the professionalism of the project manager is evolving beyond 'delivery execution' skills – and with this comes new requirements of competency, knowledge and ethics if project management is to receive wider recognition as a profession by peers. It focuses on the importance of professionalism and ethics, looking at the impact of the millennial generation and how this can shape the future of the profession, and what the profession needs to consider as it embraces the new wave of thinking and approach this generation brings.

The paper argues that this is an opportunity for the profession of project management to create a space in which millennial attitudes and behaviour, which emphasise an ethical approach to work, are trusted and supported, and can become an integral, key part of project management practice, and the design and delivery of projects.

vii. Building influence as a chartered body, promoting APM thought leadership and research

A key part of the development of the profession of project management, as it evolves to chartered status, is the need to build research and thought-leadership capability. The paper looks at how the APM research programme and wider thought-leadership activity is helping to support the development of a chartered profession.

Supporting and commissioning thought leadership, debate and research has long been an integral part of the mission of chartered bodies. Thought leadership within and between the profession and the wider public has long been central to the purpose of chartered bodies' public interest obligations. Many of the more established bodies have this entrenched in their charters, albeit in the florid and often archaic language of the charters. The paper sets out some of the ways which APM intends to proceed and the themes we wish to focus on as a profession.

viii. Driving innovation in a chartered body – Building a sustainable professional body for the 21st century

A key part of APM's transition to a chartered body is the need to build best practice across a number of aspects that support the profession of project management.

As we develop and grow, it is sensible to look to older and larger chartered bodies to see what learning and ideas we can draw from their activities and initiatives. Paper eight looked at what a number of chartered bodies have done across a number of themes to support the development of a chartered profession and to advance professionalism in their sectors.

APM has joined the ranks of a distinguished group – professional bodies endowed with a Royal Charter. The charter is a mark of trust, a recognition that the members of a profession serve not only their own interests, but also those of their clients and the wider public. This is a great asset, and we need to leverage the wholly legitimate advantages it confers. We can learn a good deal by looking at what our sister organisations are doing. This report examines the work of eight chartered professional bodies (CPBs). Some are long established.

This report addresses six themes, all relevant to the work of APM, and the new APM strategy:

- promoting chartered status;
- innovation in service provision;
- priming the talent pipeline;
- a more diverse profession;
- public representation and influence; and
- collaboration and alliances.

"The charter is a mark of trust, a recognition that the members of a profession serve not only their own interests, but also those of their clients and the wider public"

The paper is not a comprehensive catalogue of activities for each body. Instead it focused on measures that are either distinctive or representative of what is happening on the themes identified. It is worth noting that APM, despite being smaller and newer to chartered status than the others, already has a host of activities in train or planned similar to the initiatives highlighted in this paper. This paper represents a menu of options rather than a blueprint. As we seek to embed the processes and procedures for a chartered body into our evolving structure, so should we seek to draw on ideas and innovation from our peer professional bodies.

ix. Joining the dance? Creating an inclusive profession

What is the role of a professional body in guiding the profession on diversity and inclusion? This is particularly relevant in a relatively young and developing profession like project management which is still in the process of defining its own boundaries never mind diversifying them. Some professional bodies which represent traditional 'gateway' professions like medicine and law (which regulate – or at least control the entry pipeline of the profession) can have a more direct control over the development of diversity and inclusion. However, professional bodies like APM which do not regulate their profession as such, or which have members across a spectrum of sectors, might take a different approach.

**"As a chartered profession,
we will continue to publish
further papers as the
need arises"**

Part of our future role might be to act as a catalyst to developing a genuinely diverse profession – in terms of both inclusion and broadening the profession beyond the traditional construction heartland. This paper aims to develop thinking on D&I issues in an innovative way, beyond current approaches through monitoring and reporting, and ask larger questions about how to address the objectives of a Royal Charter. The challenge for all of us is how to get the project management profession to leverage D&I to improve the impact that projects, programmes and portfolios can make on the economy and society as a whole. This paper is a contribution to this debate.

5. Conclusion – the future

This set of chartered papers represent the first phase of thought leadership to support the ongoing journey to develop the project profession. As a chartered profession, we will continue to publish further papers as the need arises, to elucidate and develop themes to support thinking as the journey progresses and to seek the views of both our registrants as well as other stakeholders as to how this can and will meet the challenge of the aspirations of our Royal Charter.

6. Continuing professional development

Continuing professional development (CPD) is part of the APM FIVE Dimensions of Professionalism, and fundamental to today's business environment. It ensures that you have the breadth of knowledge to illustrate your commitment to lifelong learning in a rapidly changing environment.

APM expects professionals to undertake 35 hours of formal and informal professional development every year. This is a professional obligation to clients and employers. As a committed project management professional, you are responsible for your own CPD activities, and you are expected to complete the required hours every year.

This publication counts towards up to an hour of CPD using the reflective questions.

A list of what APM classifies as CPD can be found at www.apm.org.uk/qualifications-and-training/continuing-professional-development/

CPD reflective questions

- Reflecting on the series as a whole, which issues do you believe are most important for the future of the project profession?
- There are many who believe that Royal Chartered bodies are old fashioned and out-of-date concepts – reflect on this in the context of the 21st-century workplace and public interest challenges.
- What does it mean to you to consider becoming a chartered professional? What advantages does this confer on you and, indeed, what responsibilities?

7. APM as a chartered body: thought leadership – the 'Road to Chartered' series

As part of the launch year of chartered status, APM has published a series of thought-leadership papers for the benefit of members, as well as interested stakeholders. The papers examine and debate the key components of chartered and the contribution we believe it will make to advancing professionalism, and the profession of project management.

"The award of chartered status to APM is a tremendous recognition for a relatively new profession, which now makes such a significant contribution to social and economic well-being. I hope you enjoy and contribute to the debate through this series, and help to set the direction of travel for our new chartered body," commented APM chair John McGlynn.

"The award of chartered status to APM is a tremendous recognition for a relatively new profession, which now makes such a significant contributions to social and economic well-being"

The papers in the series:

APM's chartered papers are part of the 'Road to Chartered' series, helping to provide members with insight into what chartered means for them. A series of thought-leadership papers, they signal to the wider public the intent of the project profession and its contribution to social and economic well-being and the wider public interest. The series covers the following topics:



- 1) 21st-century professionalism: The importance of being chartered;
- 2) For the public good? Volunteering in the chartered profession;
- 3) Demonstrating integrity in a complex world: The importance of ethics in professional life;
- 4) The growing significance of CPD: Ensuring professionalism;
- 5) The robot professional? The role of project professionals in the digital future;
- 6) Professional responsibilities and obligations – the case of millennials;
- 7) Building influence as a chartered body, promoting APM thought leadership;
- 8) Driving innovation in a chartered body – Building a sustainable professional body for the 21st century;
- 9) Joining the dance? Creating an inclusive profession;
- 10) Supporting the journey of chartered professionals.

Explore the 'Road to Chartered' series at www.apm.org.uk/resources/find-a-resource/road-to-chartered-series

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