

Road to Chartered series: paper 8

## Driving innovation in a chartered body

Building a sustainable professional  
body for the 21st century

THE **CHARTERED BODY** FOR  
THE **PROJECT PROFESSION**



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## 1. Foreword

APM is on a journey to become a modern, 21st-century professional body, growing in terms of membership and its capacity to support both those members and the profession. If we are to excel in this journey we must collaborate with, learn from and adopt the best practices and innovations identified from studying the characteristics and attributes of the best professional bodies. The best project managers learn from the mistakes and experiences of others in order to avoid having to learn from their own mistakes.

The transition to a chartered body with an updated strategic plan is the perfect opportunity for APM to ensure that it professionalises its own capacity across a range of areas to support members in their own journey, as well as developing the profession as a whole for the benefit of individuals and society. One component of our strategic plan is to drive organisational innovation. This will take time and investment, supports our chartered journey and begins with a study of those around us.

As part of this journey – and this series – we are drawing lessons and insights from more established professional bodies. This paper provides a rich seam of innovations and observations selected from a comprehensive set of the learnings of all our fellow chartered professional bodies (CPBs). While every idea may not be directly relevant, each one should give us pause for thought – both individually and collectively – as they all provide excellent signposts for our journey.

The attribution we give to each idea/observation in this paper reflects its documentary source rather than (necessarily) credit for the original idea. And the frequency (or absence) of references to a professional body in this paper in no way reflects 'innovation' or the respect in which that body is held. In the competition for talent (see section 6), only the strongest survive, and all the chartered bodies referred to have proved this strength for longer than APM.

**Alan Macklin**

APM board member

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**"As this series progresses,  
it will provide members  
with insight into how APM  
will develop"**

## **2. About this series**

This paper is the eighth in a series of chartered thought-leadership papers – 'The Road to Chartered' – prepared by APM to help build its capacity as a chartered body. The series is being published over the 12 months to spring 2018. As this series progresses, it will provide members with insight into how APM will develop, what this will mean for them and, crucially, how they can be involved in this evolution. It will also signal to the wider public the intent of the project management profession to play its part in the development of the social and economic well-being of the UK – a contribution that, we believe, has for too long been underappreciated.

More detail on the other papers in this series can be found in section 12 (page 24).

We hope you will find the series informative and, whether you are a member, prospective member or interested external stakeholder, that it provides a proper context to this important phase in the development of our profession.

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"Each CPB thinks strategically, seeking to take account of all the factors affecting its future"

### 3. Introduction

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 for APM, its members, the profession and society.

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. Others, like ourselves, are more recent. But all operate in a similar context needing to compete imaginatively for high-quality recruits, to meet expectations for swift and efficient delivery of services, and to affirm standards in the face of a critical and scrutinising environment.

There's a common denominator in the examples set out in this paper. Each CPB thinks strategically, seeking to take account of all the factors affecting its future. Each body's plans are then carefully structured, with interlocking programmes supporting overall objectives. It's a systematic and long-term approach.

**This report addresses six themes, all relevant to the work of APM: promoting chartered status; innovation in service provision; priming the talent pipeline; a more diverse profession; public representation and influence; and collaboration and alliances.**

These themes link to the new APM strategic priorities ([apm.org.uk/about-us/apm-strategy](https://apm.org.uk/about-us/apm-strategy)) and are very relevant to our work looking at how we develop our capability and influence as a new chartered body to advance the status of the project profession.

What follows isn't a comprehensive catalogue of activities for each body. There's simply too much to report and, since many undertake similar activities, full coverage would entail a good deal of repetition. Instead we've focused on measures which are either distinctive or representative of what's happening across the board.

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“High ethical standards  
are a cornerstone  
of professionalism”

## 4. Promoting chartered status

A 2015 opinion poll found that 80 per cent of Britons had heard of professional bodies, yet only 41 per cent said they knew something about them.<sup>1</sup> There is, quite literally, some explaining to do. CPBs are promoting the worth of chartered status to all their external audiences by focusing on key issues and via messaging that frames the national significance of what they do. And they ensure that their own members are made aware of the practical benefits of professional status.

### The confidence to speak out

High ethical standards are a cornerstone of professionalism, but much depends on how these are adapted to new conditions. The **Chartered Institute of Building (CIOB)** argues that ethical innovation will be a powerful differentiator for the profession, essential for protecting corporate brands and improving the sector's reputation. Its 2016 report *Building a Fairer System: Tackling modern slavery in construction supply chains* points out that “fragmented supply chains, opaque procurement processes and high demand for migrant labour” expose the sector to unique challenges in tackling human rights abuses. It calls on members to “ask more searching questions of colleagues, suppliers and clients”. The report also examined how exploitative practices arise and proposed remedial measures. In parallel, CIOB has produced a series of training packages to help members implement the report's recommendations.

January 2017 saw the launch of a free online learning tool – a massive open online course (MOOC) – on ethics and compliance designed to identify conflicts of interest, minimise risk and show why it's sometimes necessary to go beyond legal compliance. It aims to “give people the confidence to speak out when something is wrong” and enables participants to interact with each other, as well the course leader, tutors and contributors.

### Redefining best practice

The **Chartered Institute of Personnel and Development (CIPD)** is working to deepen, as well as update, its ethical guidance. “As the world of work evolves,” it says, “we'll encounter more and more situations which are completely new and might not fit under our current policies, processes and rules. There are also plenty of situations where you can follow the rules, but not do the 'right' thing.”

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<sup>1</sup> *Understanding the Value of Professionals and Professional Bodies*, CIOB 2015

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**"Members must consider the impact of their decisions in terms of human outcomes"**

A new professional standards framework sets out the knowledge and behaviours that should guide good human resource (HR) practice in any situation. The work has been guided by consultations with members and informed by conversations with academics, policymakers, business leaders and the wider HR community.

A principles-led approach emphasises integrity and the ability to draw on the profession's accumulated expertise in making good day-to-day judgements. A strong and constantly augmented research base "will help dispel the myth that evidence is about hard numbers alone". The determining idea is that work must balance economic needs with social accountability; members must consider the impact of their decisions in terms of human outcomes alongside business outcomes.

### **Explaining the difference**

The **Chartered Institute (CII)** sees chartered status as a means "to secure and justify the confidence of the public" in its members and the insurance and financial planning sector. It wants to see insurance professionals achieve parity of reputation with surveying, law and accountancy: "To achieve this we must prioritise competence, integrity and – above all – our clients' interests.

"Insurance buyers know what to expect from a chartered accountant or surveyor, but don't always recognise the value of a chartered insurance broker, insurer or financial planner. Their 2015–16 'Choose Chartered' campaign was designed to increase awareness and preference among two important audiences: commercial buyers, and wealthy individuals with complex needs." Interviews with clients and brokers delivered "a positive statement of what professionalism can do" and revealed their belief in the value of chartered status as an indicator of professionalism, reliability, and trust. Using press, posters and digital channels the campaign reached 23.7 per cent of ABC1 adults aged 35+, each of whom saw the campaign three times on average.

Campaign materials are available for member firms to use in their own marketing, and they are urged to use the chartered logo as a visible symbol of their status.



### Evaluating the benefits

Professionalism entails a preference for evidence over assertion. The public is less likely to take expertise on trust. A 2015 survey of members<sup>2</sup> by the **Chartered Management Institute (CMI)** gauged the impact of chartered status on individual and corporate performance.

The findings were impressive. Ninety-eight per cent became chartered to gain recognition of their professional status; 73 per cent had noted increased professional recognition from their colleagues. One in three had benefited from a promotion or career progression since becoming chartered, and would recommend the qualification to others.

Chartered Managers estimated they added an average of £391,000 of value to their organisations. Forty-six per cent of private-sector members reported that citing the Chartered Manager designation in tenders helped their organisation win contracts.

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### Asserting the contribution

The **Royal Institution of Chartered Surveyors (RICS)** delivers a powerful message about the contribution its members make to social well-being. The tendency to take the work of professionals for granted is countered by the provision of graphic examples – such as the dramatic impact RICS members have had on the appearance of the central London skyline.

A range of materials draw attention to how chartered surveyors respond creatively to increasingly complex challenges such as the effect of climate change. It says: "With up to 70 per cent of the world's wealth bound up in land and real estate, our sector is vital to economic development, helping to support stable, sustainable investment and growth around the globe... Chartered surveyors have a truly global impact via valuation, management and development of land, real estate, construction and infrastructure. They create value by reducing risk, managing cost and delivering returns on investment. They provide confidence in the market and ensure projects and assets are delivered safely and sustainably." The institution's setting of standards ensures "a trusted universal approach and a set of consistent skills" that have a lasting impact.

## 5. Service through innovation

Chartered bodies must set an example of professionalism in action. Methods alter as new opportunities emerge, and digitalisation is the greatest of these by virtue of allowing delivery of more tailored services. Methods alter as new opportunities emerge. Digitalisation is the greatest of these, as it allows delivery of more precisely tailored services.

### Keeping the end user in mind

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“Websites and online tools are being revamped to better reflect members' and customers' actual needs”

The **CIPD**'s websites and online tools are being revamped to better reflect members' and customers' actual needs. The new customer-experience team is delivering user-friendly processes, including mobile-friendly sites to reflect the shift from desktop PCs to smartphones and tablets. The specialist units responsible for marketing and engagement with large employers are already using these new tools to gain a better understanding of what business and potential members want. Rollout is set to continue across all member- and customer-facing teams.

### Refining accessibility

The **Institution of Mechanical Engineers (IMechE)** is overhauling methods of working in sync with changes to its infrastructure. The goal is to support members more effectively by moving to cloud technology, which will provide a robust and flexible working environment. An ageing CRM database will be replaced with a single source of information for members and customers, together with improved booking and e-commerce functionality. The new operating model will take account of the extent to which individual members use the internet, and additional provision made for those in highly mobile jobs. Accessibility is being boosted by social media, now the preferred channel of communication for many members. Facebook interactions alone rose from 8.3 million in 2015 to 20.2 million in 2016.

### Delivering at local level

'One **CIOB**' is a project aimed at delivering a more member-oriented body. Two years of consultation and research revealed a desire for HQ to take more account of the time pressures arising from busy work and family lives. Members sought improved dialogue and a more localised CIOB – with products, services and networking better tailored to different parts of the country and successive stages in people's careers.

Local administrative hubs with their own budgets are being set up with locally based staff, under the direction of elected committees of chartered members. Each hub will supply a full range of services and advice, as well as engaging with employers, government offices and the education sector. A new online members' portal is offering personalised services, such as newsletter content that reflects an individual's location and interests, enabling them to quickly pinpoint the most relevant events and CPD programmes.

### Fast, accurate and comprehensive

Managers need fast, accurate and comprehensive answers to the questions their work throws up every day. **CMI** provides ManagementDirect, an online resource portal providing thousands of online articles, videos and podcasts. This enables managers to create cost-effective training and development programmes addressing challenges facing their organisations, thus reducing the need for expensive off-site training days. Members can create their own resource playlists and so adapt CMI's learning to individual corporate circumstances.

### Strategic foresight

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**"RICS conducted an exercise to provide a clear steer to the management board on what it might expect in any three-year business-plan cycle"**

An era of constant change demands horizon scanning and foresight. **RICS** conducted an exercise to help council members devise a long-term strategy – and provide a clear steer to the management board on what it might expect in any three-year business-plan cycle. *Just Imagine – RICS strategic foresight 2030* explored the forces driving prospective changes and used scenarios to develop possible responses. The study probed the views of internal and external stakeholders – through workshops, surveys and interviews. It made no recommendations, aiming instead to stimulate RICS and its members to plan ahead.

## 6. Priming the talent pipeline

All CPBs are concerned with ensuring a reliable flow of good-quality recruits from schools, colleges and universities. They look to build and maintain a career pipeline that young people can easily recognise and move into. This is especially so for those professions with no natural entry qualification, and therefore no guaranteed supply route.

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"CAS acts as a subject association for teachers and supplies training, local hubs, newsletters and networking opportunities"

### Teaching the teachers

The Academy of Computing is a learned society under the aegis of the **British Computer Society (BCS)**. It runs Computing at School (CAS), a grassroots organisation that includes teachers, examiners, university academics, and representatives from industry and professional societies. CAS acts as a subject association for teachers and supplies training, local hubs, newsletters and networking opportunities, together with a range of materials such as a YouTube channel and the CPD-oriented (and Google-backed) Barefoot Computing Project for primary school teachers. "Every single week," says BCS, "more than one million children in schools have a far better computing education than would otherwise have been possible." At the other end of the spectrum, BCS runs university chapters for undergraduate and postgraduate students.

### Inspiring through gaming

**CIOB** recognises that many young people think of construction as a fallback rather than a natural choice – hence its campaign for 14- to 19-year-olds, Inspiring the Next Generation of Construction Professionals. An innovative feature is its own version of *Minecraft*, a video game played by millions around the world. *Craft Your Future*, an immersive 3D game, introduces 12- to 14-year-olds to the roles played by maths, planning and teamwork in today's industry, while teaching about sustainability and technology along the way. It dovetails with 'MyKindaFuture', a collaboration with 4,000 schools and colleges where teams of students devise solutions to typical building problems and winners get to shadow industry professionals.

### Making it real

How do you help children see that using maths and science can be fun and creative, and that there are people called 'engineers' who make a real difference to the world? The **Institution of Civil Engineers (ICE)** has answered the question by devising an age-related series of educational packages. Civil Engineering in Your Town is a 30-minute classroom activity for younger primary school children. Water for Everyone Everywhere is a workshop for classes to explore the challenges of supplying safe, clean drinking water around the world. Beat the Flood is aimed at 14-year-olds, and involves working as a team to design and make a model of a home able to withstand the effects of flooding – tested by being stood in water and blasted with a hose pipe.

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**"The scheme accelerates early career development by letting young people work on strategic projects"**

ICE runs a highly competitive Future Leaders scheme. Each new president chooses six to eight of the institution's brightest and most motivated graduate and technician members. These are mentored by the president and a board member, engage with senior engineers, and are given a unique opportunity to gain experience and develop skills. The scheme accelerates early career development by letting young people work on strategic projects that will make a real difference to the industry.

### Building confidence

**IMechE** supports teacher development through its partnership with the Insight into Industry initiative (formerly the Teacher Industrial Partners' scheme). Seventy-five STEM teachers completed placements in leading engineering companies in 2016. Those who have done industrial placements feel they can confidently promote such a path within schools and to families.

The 'Challenges' programme is another confidence-building project helping young engineers demonstrate their skills and appreciate the potential of an engineering career. A programme of undergraduate competitions involves 61 university teams competing on unmanned aircraft systems, and design and railway challenges.

Activities directed at secondary school students include the Big Bang UK Young Scientists and Engineers Fair, the largest celebration of STEM subjects for young people in the country; Tomorrow's Engineers, a one-stop online resource shop; and the Arkwright Scholarships, which nurture high-calibre, engineering-minded A-level or Scottish Higher students for two years.

IMechE has also collaborated with employers, other professional engineering bodies and government to embed EngTech level requirements into new educational standards, and is involved in the assessment of apprentices across many advanced manufacturing apprenticeship programmes.

## 7. A more diverse profession

Diversity should be about ensuring that CPBs are equipped to attract the broadest range of talent, regardless of age, social background and previous employment, as well as race and sex. This is clearly the right thing to do, but the competition for talent is also driven by hard-edged commercial factors. As CIOB past president James Wates says: "Any industry suffering from a skills shortage is shooting itself in the foot if it doesn't make itself an attractive career option for the entire population... It's not just about gender. Nor is it just about ethnicity, disability or any other characteristic of identity; it's also about values, experiences and different ways of viewing the world."<sup>3</sup>

### Military leavers and social mentoring

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"Undergraduates are being supported by a new two-part, six-year degree apprenticeship leading to chartered membership"

In 2016, CIOB ran a campaign to attract more ex-service personnel into construction management careers. Particular attention was paid to making them aware of how the industry values their skills, and of the range of opportunities that exist. A brochure, video and supporting case studies of ex-service personnel who have become construction managers are available, as are conversion courses for new entrants from all fields of non-built environment education.

CIOB's 2015 report *Understanding the Value of Professions and Professional Bodies* called for firms to provide workers with more opportunities for degree-level learning, introduce and/or expand mentoring schemes to support those from poorer backgrounds, and rally round social mobility as a collective theme (construction has one of the best track records for social mobility of any British industry).

Undergraduates are being supported by a new two-part, six-year degree apprenticeship leading to chartered membership, which frees them of the burden of student debt. Around 80 school-leavers and recent entrants to the industry started 'earning and learning' in autumn 2017.

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<sup>3</sup> 'Building an Inclusive Workforce', CIOB blog (1 November 2017)

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**"Three-year targets for gender diversity include ensuring 30 per cent female representation on both the senior executive team and the council board"**

### Target setting

The CII was one of the first signatories of the *Women in Finance Charter*, a commitment to promote women in the sector. The three-year targets for gender diversity include ensuring 30 per cent female representation on both the senior executive team and the council board. Progress will be disclosed in an annual series of published reports. Members are advised via a new equality and diversity good-practice guide, together with an online Diversity and Inclusion Gateway. A membership consultation occurred in 2017.

A task force has been formed as part of the CII-led Insuring Women's Futures (IWF) programme to develop innovative approaches to the insurable risks faced by women. IWF aims to improve the sector's knowledge of these issues, find solutions and increase the representation of women at every level of the profession.

### Six principles of performance

**RICS** sees employee diversity as a competitive advantage for member firms and urges them to signal their commitment by adherence to a voluntary standard, the Inclusive Employer Quality Mark. Businesses set out to continually improve performance against six globally applicable criteria:

- leadership and vision: demonstrable commitment at the highest level to increasing the diversity of the workforce;
- recruitment: engage and attract new people to the industry from under-represented groups by best-practice recruitment methods;
- staff development: training and promotion policies that offer equal access to career progression for all members of the workforce;
- staff retention: flexible working arrangements and adaptive working practices that provide opportunities for all to perform at their highest level;
- staff engagement: a culture where staff engage with developing, delivering, monitoring and assessing the diversity and inclusivity of the workplace; and
- continuous improvement: refreshing and renewing the firm's commitment to being an inclusive employer; sharing and learning from best practice across the industry.

### Encouraging diversity of thought

CMI has made considerable effort to change the racial and gender balance of the profession. CMI Women is a campaign to recruit more female managers. It's supported by 'Blueprint for Balance', an open-source platform enabling members to find best practice, benchmark their organisations and share their own resources to a wider readership. 2017 saw publication of a major research report, in conjunction with the British Academy of Management, into racial and ethnic diversity in the FTSE 100 management pipeline.

### Adapting the working environment

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**"The engineering industry should adopt quality benchmarks for retaining female engineers in early-to-mid career"**

IMechE's 2017 report *Stay or Go? The experience of female engineers in early career* argues that the profession can no longer afford to be a sector in which women are expected to change their personality to 'fit in'. To recruit more women, and hold on to those they already have, employers must make the working environment more conducive and comfortable for them.

The engineering industry is urged to adopt quality benchmarks for retaining female engineers in early-to-mid career. No employee should feel a need to 'toughen up' in order to be successful. Engineers need to identify how the most effective companies address career 'flashpoints', such as returning to work after maternity leave, and implement strategies that work both for female employees and the employer. Businesses should consult all staff annually, in confidence, on their views about the fairness of staff recognition, rewards, professional support, and, where necessary, implement changes to bring about improvement.



## 8. Public representation and influence

It's easy for professions to assume that the wider world appreciates the role they play. In fact, it's crucial to set out their stall to an often critical and demanding media, public and politicians. A profession's contribution must be demonstrated, not assumed.

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**"An online platform lets members offer their ideas and debates how the society might implement these"**

### Structured oversight

The **BCS's** starting point is that "technology really does touch every part of our lives. People are concerned about IT because it's so prevalent in society – they want to keep their children safe; they are concerned about privacy. The legal and regulatory areas have a lot of challenges ahead. It's our purpose under our royal charter to ensure that everyone benefits from technology-led change."

A Policy and Public Affairs Board oversees the fulfilment of this side of the society's mission. Tasked with coordinating policy development and promotion, it must also provide a "collective voice that is truly reflective of the profession's make-up and expert view". Policies must be "exemplars of robust but rational debate, where the evidence and quality of the argument always beats the quantity or volume".

Key areas of activity include education, protecting personal data and the impact of social media on young people. A 2016 research project on the 'internet of things' provoked widespread discussion. BCS's current president has also drawn attention to the fact that "IT projects are failing on a grand scale", and highlighted the profession's role in avoiding future problems.

An online platform, BCS Voices, lets members offer their ideas and debates how the society might implement these, saying: "We will use your thoughts and ideas to help us drive change."

### Informing debate

The **CIPD** sees constant updating of the profession's knowledge base as essential to raising its profile. It conducts research on current concerns, such as the impact of social media and technology in the workplace. A recent report provided the first robust estimate of the size of the 'gig' economy. There's commentary on labour markets and employment policy, plus regular surveys on reward management, employee expectations and talent planning, all of which gives the profession media coverage.

The CIPD sees good people management as central to profit and long-term prosperity, hence its mission "championing better work and working lives by improving practices in people and organisational development". Two structures further this goal: a senior policy forum, where HR directors feed into engagement with policymakers; and a standing external consultative body, a 'future of work community' of over 700 HR leaders (including representatives from the Big Four, GSK, Coca-Cola, HSBC, Aviva and Vodafone) that explores issues that must be addressed collectively.

### Liaising with lawmakers

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"Publications and events deliver the message of 'improving productivity through people'"

**CMI** has furthered closer understanding between politicians, business leaders and senior public-sector managers by helping establish the All-Party Parliamentary Group on Management. It worked with parliamentarians to set up a Commission on the Future of Management and Leadership to investigate how both fields will need to change by 2020 in order to deliver sustainable economic growth.

Publications and events deliver the message of 'improving productivity through people'. CMI is constructing a new National Management Index to inform the debate on productivity. This pioneering project will provide a benchmark of the UK's management skills, measure progress, and demonstrate the impact of management effectiveness on business performance and national productivity.

### Drilling down

**RICS** members are involved in the whole life cycle of infrastructure projects including driving cost savings. This adds credibility to its influence in Whitehall in terms of bringing forward infrastructure funding and sharpening government's focus on repair, maintenance and upgrades.

RICS makes numerous sector-specific policy proposals. For instance, work on rural issues addresses soil quality, land-use capability and woodlands. A RICS team has concentrated on reform of public procurement and access to finance, and is working with the Cabinet Office, the Major Projects Authority and Infrastructure UK to effect change in those areas. Another is servicing the National Housing Taskforce, a sectoral and political coalition covering a dozen aspects of housing policy from planning to mortgage finance.

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"A project on driverless cars has established the extent of the public's knowledge and awareness"

### Understanding the needs of government

**IMechE** looks to understand the current and long-term needs of government. A *Manufacturing and Engineering Annual Report* and publications in six specialised fields project the views of engineers in the public domain. A project on driverless cars has established the extent of the public's views about a technology that could potentially revolutionise road transport in the very near future. Another has directed attention to the role of mechanical engineers in promoting health, fitness and well-being among a growing and ageing population. IMechE has contributed to an NHS project to harness health information technology for better patient care, bringing together the review's author with key stakeholders, an event which led to the recommendation that the institution help create and certify clinician training.

### Supporting overseas development

**ICE** gives special emphasis to highlighting the role of its members in advancing development in Africa, Asia and Latin America. Almost 60 per cent of the world's population will live in urban areas by 2030, increasing pressure on fresh water supplies, sewage, the living environment and public health. "Quality infrastructure is positively related to the achievement of social, economic and political goals," says ICE. In 2013, it set up Shaping the World, a group for devising practical responses to global challenges by pooling the collective knowledge of its members, NGOs, government and industry. A central fund helps finance grassroots projects.

ICE is naturally active in British public life, advising government (for instance, on the National Infrastructure Plan) and publishing an annual *State of the Nation* report on the condition of UK infrastructure.

## 9. Collaboration and alliances

Collaboration and building alliances is essential in the modern age, where the traditional barriers to specific professions are breaking down. Partnerships are essential to the modern professional body.

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**"CIOB joined RIBA's client liaison group to help gather evidence from different sectors and regions"**

### Combating professional tribalism

CIOB lent its support to the Royal Institute of British Architects' (RIBA's) 2015 initiative to improve the relationship between architects and their clients. It took the view that "in the uncertain, complex, often fraught environment of a building project, conflicts arise and compromise is necessary. Tribal and narrow commercial interests can easily trump good judgement and problem solving. All professionals must guard against this." CIOB also joined RIBA's client liaison group to help gather evidence from different sectors and regions about the tools architects need to improve their service to clients.

### An industry-wide alliance

The CII has formed the industry-wide Chartered Body Alliance alongside its sister bodies in the securities and investment and banking sub-sectors. The alliance is a joint brand for a range of initiatives to build trust in financial services. These include establishing a common level of qualification that can be recognised as the sector's 'gold standard', and helping consumers recognise the benefits of engaging with qualified professionals. It seeks to respond with a united voice to consultations that affect members across all three professional bodies.

### Partnerships for education

CMI is working with 90 (out of 140) higher education institutions to create a system focused on delivering practical management and leadership skills. Ninety per cent of these report that this relationship is having a significant impact on the employability of their students.

### Collaborating with campaigning bodies

The CIPD enhances its voice on key issues by collaborating with campaigning bodies with which it shares a common perspective. These include the High Pay Centre, which works to champion a more ethical approach to pay and rewards; and Engage for Success, the voluntary movement promoting the benefits of employee engagement.

### Profession-wide governance

Concerns about the governance of the profession have prompted IMechE to sponsor the independent 'Uff review' in conjunction with ICE and the Institution of Engineering and Technology. The review, published in 2017, paid particular attention to how support bodies such as the Engineering Council and EngineeringUK are meeting the needs of stakeholders.

IMechE's 2016 STEM report, *Big Ideas: The Future of Engineering in Schools*, argued that the engineering community should offer a unified narrative that would be attractive to a wider range of students by stressing the creative, problem-solving nature of engineering, its social benefits and its relevance to individuals.

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**"IMechE's 2016 STEM report argued that the engineering community should offer a unified narrative"**

## 10. Conclusions

If there's a core lesson to be learnt from these case studies, it is that today's CPBs can take little for granted, no matter how long-established they are. Common experience confirms that we have to keep our standards, policies and messaging relevant, not least because bright young people can choose from a wide range of career options.

None of this compels us to follow every fashion or downplay what is, in fact, our greatest advantage – a long and living tradition of professionalism and the immense collective experience it provides. However, it does mean we always have to be aware of what others are thinking and find new ways of remaining effective and socially beneficial professionals.

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**"Many of the ideas contained in this paper are included in similar APM initiatives, already underway"**

**Of course, the professional bodies identified in this paper have a rich heritage and are significantly larger than APM. Indeed, many of the ideas contained in this paper are included in similar APM initiatives, already underway, or are part of APM's five strategic priorities: [apm.org.uk/about-us/apm-strategy](https://apm.org.uk/about-us/apm-strategy)**

Nevertheless, crowd-sourcing ideas from other bodies is part of the process we need to take to ensure we benchmark where we are and what we might consider next.

## 11. CPD reflective questions

APM is developing the final stages of chartered status. What do you believe to be the promotional benefits to:

- the individual practitioner;
- the corporate entity;
- the profession as a whole?

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**“How can we best influence project managers who are not currently members of APM?”**

The paper’s section on innovation sets out some ideas for better service within a professional body. Which aspects do you think APM should initially target?

Talent is essential to the sustainability of the profession – as a body representing a still fledgling profession, what should be our main initial focus?

Diversity – what should be the main focus for us in this area? And how can we best influence project managers who are not currently members of APM?

Collaboration – which bodies do you believe we should focus on most in terms of developing positive collaborative activity?

### APM – 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 expect 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 [apm.org.uk/qualifications-and-training/continuing-professional-development](https://apm.org.uk/qualifications-and-training/continuing-professional-development)

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"The papers will examine and debate the key components of chartered and the contribution we believe it will make"

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

As part of the launch year of chartered status, APM is publishing a series of thought-leadership papers for the benefit of members, as well as interested stakeholders. The papers will 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 tremendous recognition for a relatively new profession that now makes such a significant contribution to social and economic well-being. I hope you enjoy and contribute to the debate through this and subsequent papers we publish, and help to set the direction of travel for our new chartered body," commented APM chair John McGlynn.

A number of themes are explored in the 'Road to Chartered' papers, including the role of volunteering, ethics and behaviours; nurturing talent; developing the next generation of project managers; and the importance of CPD.

The papers that have been published so far are:

■ *21st-century professionalism: The importance of being chartered*

In this introductory paper, the history of chartered and the step change to a chartered body are set out in more detail, including, importantly, the obligations of a modern project professional.

■ *For the public good? Volunteering in the chartered profession*

The second in the series focuses on a theme that APM has always had at its heart: volunteering.

■ *The importance of ethics in professional life*

Created in collaboration with the Institute of Business Ethics, the third paper explores different aspects of ethical behaviour and seeks to engage individuals across the profession to gain a better understanding of the increasing importance of ethics and integrity.



■ *The growing significance of CPD: Ensuring professionalism in a dynamic and changing workplace*

The fourth in the series addresses CPD, which plays a key part in the journey of a professional. Arguably, in this era of constant change and the increasing public expectation that professionals are updating their skills, CPD becomes ever more important. This paper is published in cooperation with the Professional Associations Research Network.

■ *The robot professional: The role of project professionals in the digital future*

This fifth paper looks at the impact of technology on professionals and sets out some principles for guidance.

■ *Professional responsibilities and obligations – the case of millennials*

The sixth paper looks at the influence of millennial values and behaviours in the development of the profession.

■ *Building influence as a chartered body: Promoting APM thought leadership*

The seventh paper examines APM's research strategy and the development of various thought-leadership activity to support wider engagement as a chartered profession.

Explore the Road to Chartered series at [apm.org.uk/resources/find-a-resource/road-to-chartered-series](https://apm.org.uk/resources/find-a-resource/road-to-chartered-series)





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