



Road to Chartered series: paper 1

21st-century professionalism

The Importance of Being Chartered

THE **CHARTERED BODY** FOR THE
PROJECT PROFESSION

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Appendices

1. The APM Charter (extract – object and powers)
2. CPD – reflective questions

The award-winning Association for Project Management (APM) is the Chartered body for the project profession. APM is committed to developing and promoting project and programme management through its **FIVE Dimensions of Professionalism**.

Continuing professional development

This series will carry a set of reflective questions so that all the papers can be part of an individual's continuing professional development (CPD) activity. Each paper, including the reflective element, should count for up to an hour.



1. Foreword

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.

This is a significant moment in the history of the project management profession, and of APM in particular. However, it is important to acknowledge the hard work that led to this achievement. We are privileged to share this success with those who laid the foundations for the association and the discipline we now know as project management. To reach this point in a single generation is a remarkable achievement and a testament to the tenacity, resourcefulness and professionalism of all concerned.

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 the professionalism, and the profession, of project management.

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.

John McGlynn
Chairman, APM

2. About this series – the Road to Chartered

APM received its Royal Charter following notification from the Privy Council Office in October 2016 that Her Majesty The Queen had approved its application. The Charter represents a significant milestone in the development of the profession and completes the final phase before the association transitions to a full Chartered body in April 2017.

The receipt of the Royal Charter marks a significant achievement in the evolution of project management and those who make, and seek to make, a career in this field. The Charter provides recognition for the profession, a reward for the association that has championed its cause and an opportunity for those who practise its disciplines.

The series will be published, starting with this introductory paper, over the next 12 months. The various papers will address specific aspects relating to Chartered. These will include: ethics and behaviours; the importance of continuing professional development (CPD) and lifelong learning to the modern professional; the wider contribution of thought leadership and research; why the public interest is such an integral part of the Chartered concept; and other topics.

As this series progresses, it will provide members with insight into how their professional body will develop and what this will mean for them, and crucially how members 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 country – a contribution which, we believe, has for too long been underappreciated.

This series of papers will also act as a springboard for debate – surely an essential role for a professional body – and will help explain the transformation APM is experiencing as it evolves into a fully fledged Chartered body.

It will also provide a backdrop to the essential and detailed work being undertaken throughout 2017 and into 2018 as APM develops the new standard for the profession and the establishment of a register of Chartered Project Professionals. This essential work needs to be as thorough as possible to ensure that APM establishes the appropriate standards for a fully constituted Chartered body that will inspire public confidence.

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

Let us know your thoughts as the series progresses.

“Now, through APM's Royal Charter, the profession has achieved official recognition of the sheer scale of project management's impact on the economy and society. This, in turn, demands that we as individuals continue to commit to personal learning and development, and also to the highest standards of probity and integrity”

David Waboso
President, APM



Pictured: APM's John McGlynn (chairman), David Waboso (president) and Sara Drake (chief executive) with the Royal Charter, December 2016

"The Charter provides recognition for the profession, a reward for the association that has championed its cause and opportunities for those who practise its discipline. Having a day job at Atkins, one of the world's leading engineering and project management consultancies, brings home to me the importance of the work APM has been doing over the past 40 years. The work has made a significant contribution to the ability of organisations such as mine to deliver today's increasingly complex projects on time, as well as on budget"

John McGlynn
Chairman, APM

3. APM and Chartered – the story so far

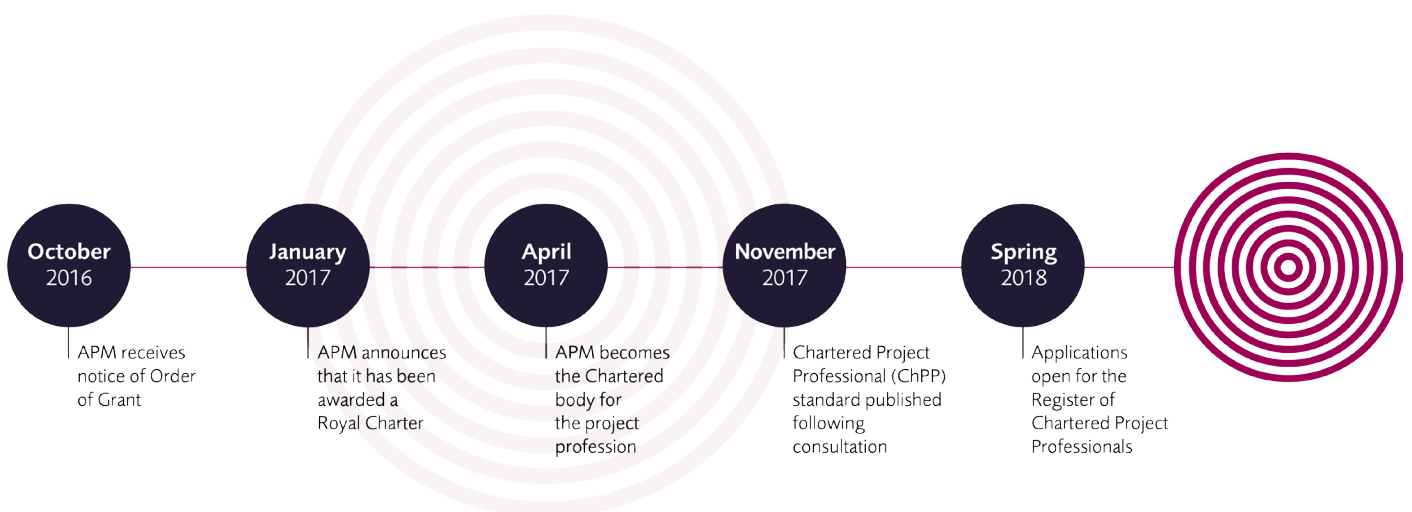
APM has a proud history. Founded in 1972, it has played a key role in developing project management as a profession. This contribution has included the *APM Body of Knowledge* and *APM Competence Framework*, as well as a range of qualifications that provide developmental opportunities and recognition for all stages of a project professional's career.

Chartered status takes APM to the next stage in its journey of growth. It has been achieved thanks to the hard work and commitment of those dedicated to achieving APM's goals of upholding and raising professional standards in project management. Over the past few years, preparation has been underway to transform APM into a Chartered body. Chartered status is not granted lightly, and requires an exhaustive and rigorous process, overseen by the Privy Council.

The rationale for Chartered status is clear. APM aims to:

- raise standards through a robustly assessed register of Chartered Project Professionals who are committed to professional development and a code of conduct;
- enhance the status and recognition of project management as a means of delivering effective change that improves our economy and society; and
- facilitate continued collaboration and research with other professions to develop the practice and theory of delivering successful change across sectors and industries.

4. Key milestones



“Becoming Chartered has always been a key step in the career paths of other professions and, for APM, it represents a critical part of our journey towards cementing the importance of project management to society”

Simon Taylor
Board member and
volunteer champion, APM

“Chartered status will help APM develop its leadership role as the voice of the profession, demonstrating the societal and economic contribution of project management, leading and influencing others, and encouraging inter-disciplinary collaboration with like-minded individuals, as well as organisations”

Sara Drake
Chief executive, APM

5. What is a Royal Charter?

Royal Charters date back as far as the 11th century and today cover a wide range of bodies, including universities, charities and professional institutions. It is the monarch, on the advice of the Privy Council, who grants Charters. Originally, a Royal Charter was the only way to incorporate a company, whereas today new Charters are normally reserved for bodies that work in the public interest.

A uniquely British institution, yet something that has developed a strong global reputation, a Royal Charter is a hallmark of quality and excellence for whichever profession it represents, and project management is no exception. Charters are not awarded lightly – quite the opposite, as they require a commitment to the highest standards of professionalism and continued learning.

The value a Royal Charter embodies is understood by the general public, which trusts Chartered professionals, recognising the dedication required to reach that level, and the commitment to high standards of knowledge and conduct. In an age when the public spotlight and external scrutiny are never far away, and consumers are more challenging than ever, being Chartered helps you stand out from the crowd. Where trust and confidence is hard to come by, a Charter symbolises the very best of a profession.

A body applying for a Charter is expected to meet a number of demanding criteria. These include the requirement that the institution should comprise members of a specific profession that is able to demonstrate a track record of achievement over a number of years. Above all else, there should be a convincing case that it is in the public interest to provide government oversight of the body, as future amendments to the Charter will require Privy Council approval.

Chartered professional bodies draw their authority via approval of their Charters by the Privy Council. They volunteer for this government oversight because of the high standards that a Charter represents, and because it is something recognised by the public. Unlike trade bodies, which represent the interests of their members, Chartered bodies are bound to protect the public interest above that of their members.

Once a professional body is granted a Charter, it is then able to grant Chartered titles to those individuals that meet the strict qualifying criteria. This usually means that members must uphold the rules of the Charter, including complying with any 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. Put simply, Chartered is seen by professionals and the public alike as a hallmark of trust and quality.

6. How professional bodies have modernised – an independent assessment

Since the start of the 21st century, the role of many Chartered and professional bodies has transformed and modernised, despite maintaining the overall ethos of the Chartered philosophy.

The Professional Associations Research Network (PARN) has a pan-professional body research capability that provides invaluable support, as well as independent benchmarking for the progression of Chartered bodies. In PARN's 2015 *Sector Review*, the organisation's founder, Professor Andy Friedman, provided a fascinating oversight of thematic changes to the professional body sector that is set out in the extract below.

"Recently I had a look at a book which is to my knowledge the only attempt to survey the professional body sector before we began our work on mapping the sector at PARN. That book, *The Qualifying Associations: A Study in Professionalization* by Geoffrey Millerson, was published 50 years ago! I was struck by how many different ways professional bodies have changed since the 1960s. Of course, then as now, there are many different professional bodies, but on average we can say there have been some really substantial changes.

"Three broad changes seem to be of greatest significance.

"Professionalising professional bodies

"The first and perhaps most obvious change for those working in the sector has been the great strides in what we may call the professionalisation of the professional body sector. This is evident in several ways. The proportion of work carried out by full-time staff compared with volunteers has grown. In addition, the level and expected competence of those at or near the top of the staff structure has changed. In Millerson's time, the top staff member was called the secretary or general secretary and was primarily a servant of the governing body. They would be responsible for taking minutes at volunteer meetings and arranging the provision of information required by the governing body or other committees. They would also manage largely administrative staff concerned with member subscriptions and records.

"Today, we are more likely to see the top staff member called CEO and supported by a cadre of staff concerned with policy issues. Those at the top are expected to have experience of policy making and managing professional bodies to carry out their role. In addition, as we noted last year, a particularly high proportion (around a third) of these CEOs are women.

"Further evidence of professionalisation concerns governance arrangements. In the 1960s, professional bodies were run largely as they had been for centuries. They were rather like clubs, run by large councils of elected members (half with 50 or more, according to Millerson), representing primarily the geographic distribution of members, and supported by a complex and sometimes confusing committee structure: half would have eight or more different committees. Now, more than 65 per cent have strategic boards as their governing body with just 12–14 members on average, made up of a mixture of selected and elected members. Again, a striking feature is the relatively high proportion of women on the governing body these days – more than a third.

"Implementing CPD

"Second, besides how professional bodies are governed and managed, there have been critical changes in what they do. The most significant change has been continuing professional development (CPD). There was no formal CPD in the 1960s. While professional bodies may have recorded how many attended events, they did not record which events individual members attended. Professional bodies primarily qualified candidates for admission into the profession and into membership. After admission, only a small proportion of enthusiasts and volunteers maintained regular relations with their professional body. This has completely changed. Now, 80 per cent of professional bodies have a CPD scheme, and the scheme is compulsory (for at least some categories of members) for 53 per cent of these, with participation monitored and sanctions for non-compliance. Through CPD, there is now a continuous relationship with

"Chartered status demonstrates how important all those involved in project management are in achieving growth, improving the quality of people's lives and enhancing future prosperity"

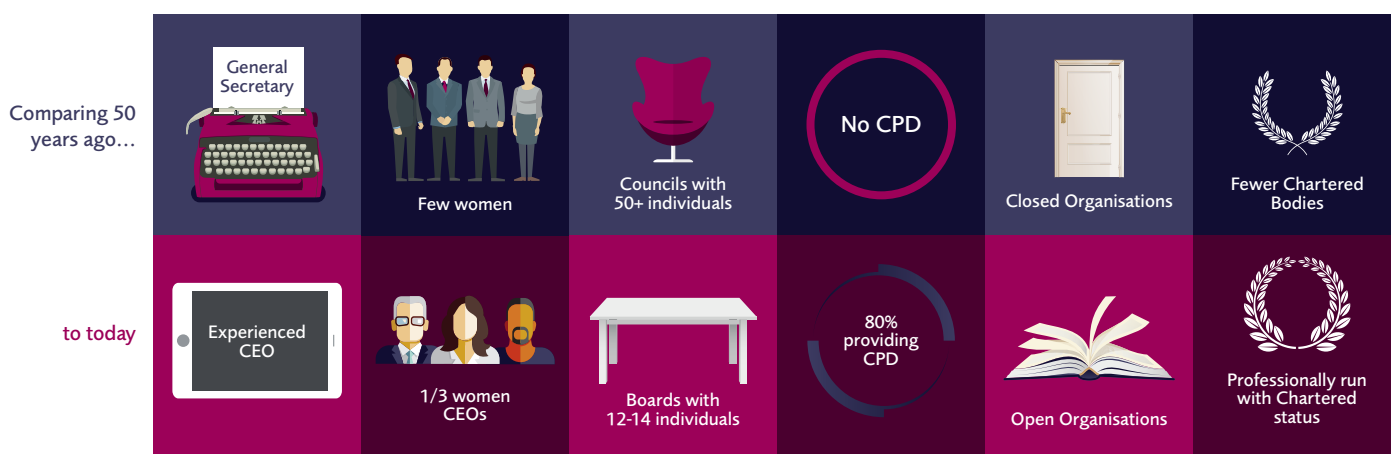
Frances Nichols, chair,
and Kathryn Nichols, CEO,
The Nichols Group

members (almost all members if the scheme is compulsory) throughout their career. Rather than merely qualifying potential members once at the beginning of their careers (and perhaps once more when they become Fellows or other senior levels in the profession), professionals must now demonstrate what they are doing to maintain and develop their competence throughout their working lives. As a result, the professional body's relationship with members is deeper and more constant than it may have been in the past.

"The ways in which professional bodies support their members has also changed. Much more is provided electronically and, in recent times, remotely. The physical location of the professional body's head office has become less important. In the past, the library and meeting rooms were key benefits members enjoyed. Today, communication is generally by email or through the website, and most recently through social media.

"Opening up the professional body sector

"A third really important change since the 1960s is the greater openness of professional bodies. In the 1960s, no organisations had websites. Throughout society, the means for greater openness has increased markedly in the past 50 years. However, in addition, the desire to convey information to the public concerning professional body activities has grown. For example, results of disciplinary procedures are much more likely to be made public nowadays; in some cases, progress of disciplinary cases is made public, as well as the decisions made (that is, the rationale for imposing sanctions). Many professional bodies, and regulatory bodies in particular, hold their hearings in public. Similarly, ethical codes have become more public documents, reflecting the rise in obligations aimed at protecting the public, rather than only the profession or other members. Millerson noted that: 'Qualifying associations would seem to show a remarkable lack of concern with the problem of professional conduct... The content of professional codes of conduct was most commonly concerned with restricting advertising and members poaching clients from each other. We did not find any obligations of that nature in our analyses of codes during the past 10 years, except that such activities should be carried out in a non-offensive manner.'"



Source: PARN

“APM's Chartered status will provide a benchmark for project management excellence that practitioners from all industries can aspire towards and be measured against”

Spencer Hobbs
2016 APM Project Professional
of the Year Award winner

7. Chartered – the benefits

Chartered status brings a number of benefits to the individual practitioner who holds the title, as well as to the professional body or organisation that holds Chartered status, or that has a body of Chartered practitioners working for it.

Chartered status for project management will bring significant benefits for the industry and the sectors it supports:

- a recognisable mark of quality, setting standards of professionalism and performance;
- the development of a cadre of assured professionals who can lead the delivery of projects; and
- the opportunity to attract and retain the best project management talent in the country, and address the global shortage of qualified and assured project management professionals.

For individuals and the profession, Chartered:

- raises the profile and value of project management as a profession, and increases recognition of the individual;
- offers a clear professional development route;
- raises awareness of project management as a primary career choice;
- provides parity of esteem with other professionals in other walks of life; and
- signifies your commitment and adherence to professional and ethical conduct, providing public trust and confidence.

Being professionally registered is a mark of excellence, and Chartered status offers public recognition of this.

Ultimately, Chartered status provides an assurance of standards and professionalism for the public benefit.

8. The next stages and conclusion

Following the practical transfer (ie the transfer of assets and members from the current charity to the new body) of APM to a fully fledged Chartered body in April 2017, the second phase of the transformation begins.

This continues a process that started at the November 2016 Annual General Meeting. The new APM will also be a charity, keep its current name and become operational on 1 April 2017.

Over the next 12 months, APM will develop the new Chartered standard to underpin the profession's new status and prepare the necessary guidance, training and IT infrastructure required to deliver it.

Throughout the year, we will run a programme of activities, thought pieces and campaigns to demonstrate the understanding, awareness and contribution of the project management profession in addressing the key challenges faced by society.

Register of Chartered Project Professionals

APM is preparing for the next important phase of creating a register of Chartered Project Professionals (ChPP).

The standards and required regulations will be published in November 2017 following consultation, and APM will begin accepting applications to the register of Chartered Project Professionals in spring 2018. The objectives of the register are:

- to raise standards through a robustly assessed register of professionals who are committed to professional development and a code of conduct; and
- to enhance the status and recognition of project, portfolio and programme management as a means of delivering effective change.

Chartered Project Professionals will be registered subject to:

- meeting a level of competence attained through an appropriate combination of knowledge and experience;
- a rigorous entry process, including peer review;
- commitment on CPD; and
- undertaking to comply with the Code of Professional Conduct.

With the award of Chartered status, APM will work closely with government, the private sector and professional bodies to demonstrate how the project management profession meets the growing public demand for projects, programmes and portfolios that not only deliver lasting benefits to society, but also provide lasting legacies.

As Sara Drake, chief executive of APM, puts it: "The development of the register of Chartered Project Professionals is a central pillar in our drive to raise standards of project, programme and portfolio delivery. Our intention is to provide a register that offers (to clients, employers and the public) confidence of quality across the rich diversity of skills involved in project management in the quantity needed by the profession and by society across all walks of life."

APM has been working towards the objective of creating a Chartered organisation for some time. We are now well placed to deliver the benefits of Chartered status to the sectors and organisations that we support, and ultimately to wider society. We will continue to communicate on progress throughout 2017 – and this series is a contribution to the debate and discussion on this final process.

PLEASE SEND ANY THOUGHTS ON THE SERIES TO EXTERNAL.AFFAIRS@APM.ORG.UK

Appendix 1

The APM Royal Charter is a long document written in the peculiar language that is the tradition of Charters throughout history, but it is worth a look – not least to see the object and key powers conferred on APM by the Charter. Therefore, we set out below an extract from the Charter covering the object and powers.



ELIZABETH THE SECOND

by the Grace of God of the United Kingdom of Great Britain and Northern Ireland and of Our other Realms and Territories Queen, Head of the Commonwealth, Defender of the Faith:

TO ALL TO WHOM THESE PRESENTS SHALL COME, GREETING!

WHEREAS the incorporated organisation commonly known as the Association for Project Management has petitioned Us for a Charter of Incorporation, AND WHEREAS We have taken the said Petition into Our Royal Consideration and are minded to accede thereto:

NOW THEREFORE KNOW YE THAT WE by virtue of Our Royal Prerogative in that behalf and of all other powers enabling Us so to do of Our especial grace, certain knowledge, and mere motion do hereby for Us Our Heirs and Successors will grant, direct, appoint and declare as follows:

ASSOCIATION FOR PROJECT MANAGEMENT

1 The persons now members of The Association for Project Management (“the former Company”) and all persons becoming members of the Body Corporate or Corporation constituted by or under this Charter shall be for ever (so long as they continue to be members) one Body Corporate by the name of the Association for Project Management (“the Association”) and by that name may sue and be sued in all Courts, and in all manner of actions and suits, and shall have power to do all other matters and things incidental or appertaining to a Body Corporate.

2 OBJECT

The Object of the Association is to advance the science, theory and practice of project and programme management for the public benefit.

3 POWERS

The Association shall have power to undertake all reasonable and lawful activities to assist it to attain its object, including, but not limited

to, the following powers:

- (i) To arrange meetings, educational courses, lectures, and social occasions.
- (ii) To facilitate the production and distribution of books, and other publications and educational courses and lectures.
- (iii) To maintain libraries.
- (iv) To promote research and to provide advice.
- (v) To create and maintain a Register of Chartered Project Professionals in Project Management, whether separately or in association with one or more other organisations, and to set admission requirements and conditions for continuing membership of the Registers of Members and of Chartered Project Professionals.
- (vi) To award post nominal descriptors, which may include the word “Chartered”, to those people whose names appear from time to time on the Register of Chartered Project Professionals in Project Management.

- (vii) To regulate the professional conduct and discipline of members of the Registers of Members and of Chartered Project Professionals.
- (viii) To promote the formation of organisations, whether charitable or not, for the purpose of the Object of the Association and to assist such organisations as necessary in the fulfilment of their Objects.
- (ix) To provide for lectureships, bursaries, prizes and grants.
- (x) To give and lend money.
- (xi) To establish and manage trusts, endowments, scholarships and exhibitions.
- (xii) To work together with any institutions or persons having a charitable Object similar to that of the Association.
- (xiii) To recruit, employ and remunerate staff.
- (xiv) To generate income.
- (xv) To invest the monies of the Association.
- (xvi) To acquire property and buildings.
- (xvii) To manage and dispose of the assets of the Association.
- (xviii) To borrow or raise money and to enter into insurance contracts.
- (xix) To pay for indemnity insurance for the Trustees.

Appendix 2

CPD – reflective questions

Chartered status will be a step change in the professionalism (qualifications, competence standards and behaviours) of APM members. Reflecting on this journey ahead, and having read this first paper in the Road to Chartered series, you can consider the following reflective questions:

- In what way might the granting of the Royal Charter impact the public perception of the project management profession?
- How might Chartered be best used to advance and enhance the progression of the profession as a whole (status and public confidence)?
- Will the granting of the Charter bring increased obligations on members, as well as opportunities – ie should ethics and behaviours play a greater role in the profession in the future, and if so, how?

APM – Continuing professional development

Continuing professional development (CPD) is part of the **APM FIVE Dimensions of Professionalism** and fundamental to business today. 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 one hour of CPD using the reflective questions.

APM is pleased to be a research partner of the Professional Development Consortium, which exists to support all those involved with CPD. A link to what APM classes as CPD can be found at apm.org.uk/qualifications-and-training/continuing-professional-development

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