Building influence as a chartered body

Promoting APM thought leadership

THE **CHARTERED BODY** FOR THE
PROJECT PROFESSION

Contents

1. Foreword

APM is on a journey to become a modern 21st-century professional body.

As it grows in terms of membership and capacity to support members and the profession, it is vital that we take on the characteristics and attributes of the best professional bodies. Central to this is the capacity of a professional body to be a learned society as well as a qualifications and educational institute.

The transition to a chartered body, and an updated strategic plan, provides a great opportunity to ensure that APM is a leading promoter of research in the field of project management and is a thought leader for our profession, promoting and debating the issues that matter for our members, the profession as well as those which impact the wider public interest.

As this paper outlines, we have already made good progress towards this goal. Nevertheless, there is much still to do to build the content and capacity of APM to fully meet our objectives, engage volunteers and members and, crucially, engage with a wider audience of stakeholders. This chartered paper will hopefully contribute to, and help focus, this process.

Conducting research and promoting thought leadership, and engaging in the wider debates that will influence and impact the profession, is crucial to developing the profile and status of the profession. It will also ensure our new chartered status is matched by a growing appreciation and perception of the project management profession by other chartered and professional bodies, as well as influential stakeholders such as parliament and government, academics, trade, professional and consumer bodies and, increasingly, in the international domain.

To do this, our thought leadership and research activity needs to be backed by a developed and robust advocacy approach. The research and other papers we produce – like this chartered series – must be widely disseminated and create increasing influence and advocacy for our profession.

Susie Boyce
Chair, Advocacy and Nominations Committee, and APM board member

2. About this series

This paper is the seventh in a series of chartered thought-leadership papers – 'The Road to Chartered' – being prepared by the Association for Project Management (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 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 wellbeing of the UK – a contribution that, we believe, has for too long been underappreciated.

More details of the other papers in the series are in section 11 (page 16).

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.

3. Introduction – APM as a chartered body

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. In APM's own Royal Charter, awarded in 2016, it is explicitly mentioned in Power 4 and throughout:

(iv) "To promote research and to provide advice"

One of the core features of a professional body is its learned society function. Before the recent achievement of chartered status, APM had been investing in developing this through thought leadership and research. For example, in 2016, APM became a member of the Academy of Social Sciences. This seeks to fulfil APM's Charter objects in order to achieve its mission by:

- influencing and shaping discussions and debate to help APM's recognition as the voice of the profession regardless of the scale or scope of projects, programmes or portfolios through a broad thought-leadership programme and engaging APM members in discussions, events, publications, research and other outputs;

- developing relationships with a variety of outside interests, such as other professional bodies and membership organisations; government departments, ministers and public bodies; parliament, the political community and think tanks; academics and educational institutions and their representative bodies;

- commissioning and promoting primary and secondary research. This will help build further the links with the academic project management community; and

- helping to improve the linkages and dialogue between theory and practice.

The above elements should combine over time to promote APM, the chartered profession, and build the reputation of both. It should help to underpin APM's five strategic objectives, briefly summarised as:

- Chartered standard.

- Membership growth.

- Knowledge and research.

- Organisational innovation.

- Collaborate and engage.

With regard to thought leadership, there is a particularly strong focus on the knowledge and research objective:

Knowledge and research: Advance the art, science, theory and practice of project management with an innovative knowledge and research programme.

"With regard to thought leadership, there is a particularly strong focus on the knowledge and research objective"

4. Thought leadership

The thought-leadership programme we are developing is in its early stages, but with APM now a chartered body, there is added impetus importance to developing project management as a profession, both in perception and reality.

Thought leadership in its broadest sense is the means for a professional body to provide clarity and insight on current and future challenges to the profession, and to engage in debate and new thinking within the profession and with others in the wider public sphere. This is consistent with our obligation as a Royal Charter body to stimulate and influence educational and other debate in the profession.

The thought-leadership programme we are developing is based around:

1) a research programme;

2) a policy development and analysis programme; and

3) an engagement and advocacy programme, which underpins 1) and 2).

This paper looks at these three inter-related components of APM thought leadership within APM's External Affairs capability.

5. Research

APM, the chartered body for the project profession's research programme, aims to advance new and existing knowledge in the delivery of projects, programmes and portfolios. By developing innovative research and sharing its results and findings, APM helps to develop and promote a profession built around learning and collaboration. In this way, research helps to fulfil APM's chartered objectives while providing funding, dissemination and promotional opportunities.

The APM research programme was developed based on a three-tier system, or pyramid, of escalating levels of commitment:

- The first stream is APM commissioned research, which seeks to provide solutions to key project management questions often through joint working with key stakeholder groups.

- The second stream explores knowledge gaps or emergent themes for further exploration or identified as areas of strategic interest to APM.

- The third stream comprises a number of vehicles, including: the creation of an APM Research Fund; development of research summaries arising from academic research for the use of practitioners; and providing support and guidance for researchers and collaborative opportunities. This can also involve sponsoring and supporting external research conferences and events, which add value to the APM research programme.


Tier 1: APM Commissioned studies

Tier 2: Emergent themes and knowledge gaps

Tier 3: APM Research Fund (grant funding) Research summaries and Research events and support
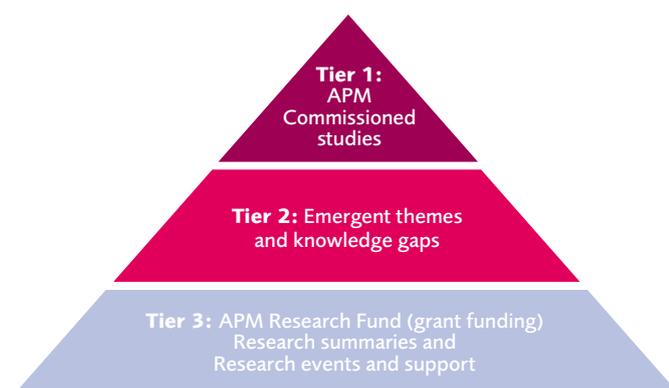
Figure: APM's Research programme

The value of research

PwC's *Business of Evidence 2016*, commissioned by the Market Research Society initially in 2012, provided an assessment of the size and impact of the UK research and evidence market. The UK business of evidence currently generates £4.8bn in Gross Value Added. From a £3bn market in 2012 that was looking to new ways to improve old processes, the UK's research market has exploded by more than 60 per cent, driven by data analytics, insight generation, and social media and web-traffic monitoring. This means that the business of evidence market has significantly outpaced the growth in the UK economy as a whole, which showed growth of only 8.7 per cent over the same period. And with £4.8bn representing 0.3 per cent of total UK GDP, the UK research sector has revenues larger than the music industry, and also the PR and communications sector.

"The business of evidence market has significantly outpaced the growth in the UK economy as a whole"

Research at APM to date

In advance of becoming chartered, there was a strategic intent to build APM capacity for originating research beyond the volunteer Specific Interest Group research, which had been building up over the years. APM consulted widely in 2014/15 to identify key themes and expectations for future research.

This review identified three key, consistent themes:

1. The need for research from APM to address knowledge gaps or emergent themes;

2. The appetite to disseminate cutting-edge research for practitioners; and

3. The encouragement of collaboration with other professional bodies and external parties.

The result led to the creation of a research function with the aim of generating new and advancing existing knowledge in supporting the delivery of the management of projects, programme and portfolios.

The initial focus has been on the following:

- The creation of a Research Advisory Group (RAG) to provide advice and guidance on its research programme and activities.

- Creation of an annual APM Research Fund, which provides seed funding and grant funding for small-scale research projects.

- Leading, coordinating and supporting a variety of research studies, including: Conditions for project success, Future of Project Management and the successful delivery of change in the public sector, among many others.

- The inception of the APM Salary Survey, which has involved more than 12,500 participants since 2015.

- Sponsorship of major international research conferences and events, including IRNOP (International Research Network on Organizing by Projects) in 2015 and EurOMA (European Operations Management Association), among others.

- Gaining admission for APM to the Academy of Social Sciences as a 'learned society' and other collaborations with research and academic institutes.

Good progress is being made on these and other research and thought-leadership initiatives. For example, the 2016 successful Research Fund bids are now being published; the 2017 series are well developed and in the process of data collection; and the call for funding for 2018 will run from October 2017 to February 2018, so this pipeline is flowing and we will continue to build on this. For example, November 2017 saw the launch of a new initiative – the APM Research Summary Series, which will focus on the production of practitioner summaries drawn from published *International Journal of Project Management* (*IJPM*) papers. It is anticipated these summaries will become an ongoing means of disseminating academic research for practitioners, with up to 20 produced annually. In 2018, APM will also look to refresh the APM RAG, so we will be seeking additional representatives from APM's key stakeholder groups, including academics, individual practitioners, APM's volunteer community and our corporate members.

"There was a strategic intent to build APM capacity for originating research beyond the volunteer Specific Interest Group research"

"November 2017 saw the launch of a new initiative – the APM Research Summary Series"

Looking further ahead

A number of major new activities will be scoped and considered over the new strategy period of 2018–22, including:

■ **Greater emphasis on supporting Early Career Researchers and doctoral students** who may wish to share the findings of their work with the project management community. Workshops and scoping work will commence from 2018/19, so please get in touch if this applies to you.

■ **APM's new Corporate Partnership Programme** consisting of partners and affiliates creates a good opportunity for employers and partner organisations to engage better with research. We envisage good prospects for collaboration in this area in the future. The Future of Project Management collaboration is one such example.

■ Part or whole grant funding of PhD students (possibly in conjunction with corporates and/or HEIs).

■ **International research network and fund**, for example, collaborating with international associations, possibly collaborating with those associations with excellent research proposals of relevance to the UK, but without the prospect of local funding.

■ Internationally significant research studies in association with major academic institutions, **increasing APM's reach into A-journals in the wider management field** (for example, Academy of Management).

■ **Leveraging APM interest in the *IJPM* to elevate its standing as a global research journal.** The first stage of this is to develop research summaries from past papers; the second is to encourage submissions to *IJPM* as a standard research output for APM-funded studies.

■ **Production of a project management research conference** open to researchers and learned practitioners and organisations.

■ Investigate the possibility of an **academic prize reserved for genuinely outstanding research** (a kind of project management Nobel Prize).

■ A follow-on to the 2015 research on **Conditions for project success** to benchmark against the previously identified success factors, while identifying potential solutions and interventions to improve project delivery.

■ Greater engagement with corporate members in helping to shape, develop and deliver future research.

■ Continued consideration of major themes and issues, such as increasing understanding that the role of time plays a critical part in understanding projects and what this will mean for the type of practitioner we need for the future, for example.

"Workshops and scoping work will commence from 2018/19, so please get in touch if this applies to you"

6. Policy

APM is also building up its policy capability. This will run in parallel to the research programme to ensure that APM is engaged and producing relevant policy and public affairs content. While professional bodies are not lobbyists in the traditional sense, they should and do debate and engage with influencers and opinion formers on issues relevant to our status as a learned society. This is particularly relevant as project management comes of age as a chartered profession.

As the policy side of APM develops, it is worth reflecting on the initial set of activities:

- publishing a series of policy notes, for example, Brexit, Industrial strategy and T-Levels;

- developing a series of support initiatives like the new apprenticeship guidance for employers;

- developing a prototype monthly research and external affairs briefing for members (**'APM Monitor'**), which will provide an at-a-glance summary of key developments in parliament and the civil service, key research and other reports;

- expanding the use of blog and social media on a variety of issues;

- utilising innovative 'one-offs' like the Skills Manifesto (matching other chartered bodies); and

- responding to government and other consultations.

"While professional bodies are not lobbyists in the traditional sense, they should and do debate and engage with influencers and opinion formers on issues relevant to our status as a learned society"

7. Advocacy and engagement – building a voice for the profession

"The engagement and advocacy strategy developed in 2016 has been adapted and updated to take into account both the new APM strategy and the move to chartered status"

The combination of this thought leadership – research and policy – will act as a focus for engagement and collaboration with external stakeholders to raise the perception and influence of the project management profession.

The engagement and advocacy strategy developed in 2016 has been adapted and updated to take into account both the new APM strategy and the move to chartered status.

There are four main objectives for our advocacy approach:

- influencing and shaping discussions and debate;

- developing relationships with a variety of external audiences;

- commissioning and promoting primary and secondary research; and

- engaging volunteers; and individual and corporate members in discussions, events, publications and research.

Stakeholder mapping
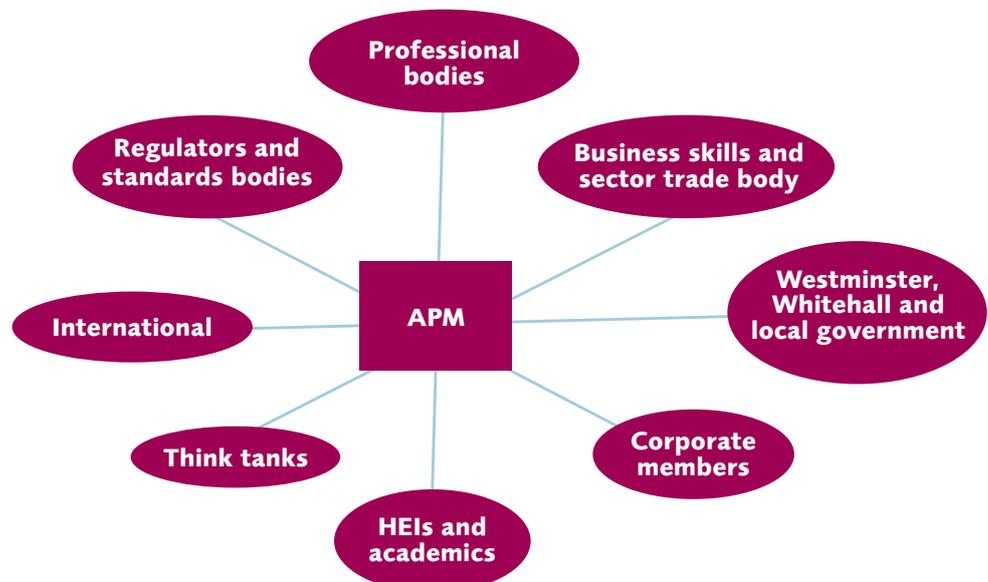
"APM will increase our status as an opinion former and influencer"

The purpose of this advocacy approach is, by informing and listening to a wider audience, we want to clarify our position on where we (APM and the profession) are now, where we want to be and how we intend to get there. In this way, APM will increase our status as an opinion former and influencer; demonstrate listening, learning and leadership; inform and implement our strategy to guide our business planning; and develop mature relationships with other bodies by seeking to move along this continuum:

How to develop mature relationships with other bodies
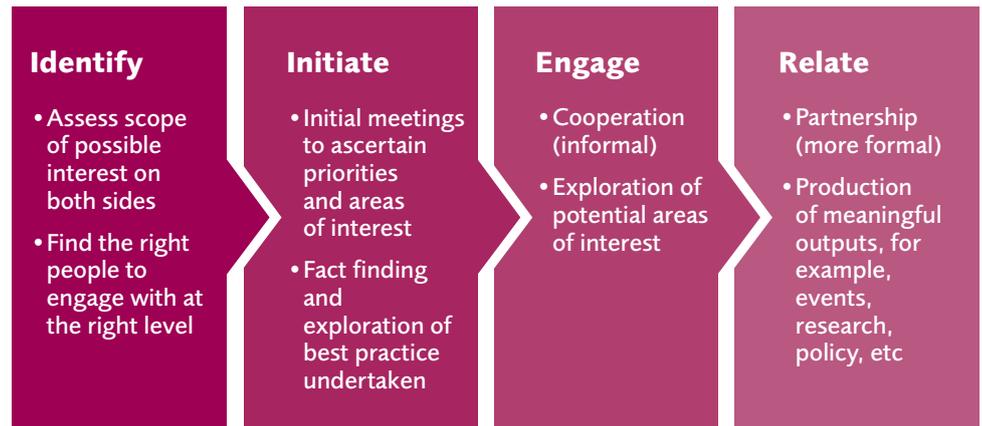
Identify
- Assess scope of possible interest on both sides
- Find the right people to engage with at the right level

Initiate
- Initial meetings to ascertain priorities and areas of interest
- Fact finding and exploration of best practice undertaken

Engage
- Cooperation (informal)
- Exploration of potential areas of interest

Relate
- Partnership (more formal)
- Production of meaningful outputs, for example, events, research, policy, etc

"This strategy will develop the capacity building for the recognition and status of the profession"

The stakeholder mapping process will be developed by a process of prioritisation, ie chartered and professional bodies (because of the chartered consultation), as well as business and trade bodies in the first phase. This will not preclude developing existing (Institute of Business Ethics, Academy of Social Sciences) or important new relationships (Confederation of British Industry, Institute for Government) where applicable.

This strategy will develop the capacity building for the recognition and status of the profession in the perception of political, business and other leaders and influencers; enhance the professionalism of project management through skills and standards; and demonstrate the importance of professionally qualified project managers to the UK economy in a globally competitive context. This, in turn, should provide a more favourable context in which to recruit corporate and individual members; and should provide scope for developing commercial benefits from improved relationships with other professional bodies.

8. The future

APM's new strategic agenda – and elevation to chartered status – presents a golden opportunity to ensure the voice of project management is heard in public debates. To do so effectively, similar to the other, more established professional bodies, we need the evidence (ammunition) through research and policy to ensure this engagement is based on grounded evidence. This paper outlines the progress to build this capacity on behalf of the profession.

However, APM is not just an organisation – it is a profession, and it is important that members are engaged with this agenda.

In this light, we welcome your thoughts and ideas on how to achieve this and feedback on how to build the status and raise the voice of the profession. Of the content already developed, is it valuable? What other topics or issues should be covered? How can APM better support you and your organisation?

Send us your thoughts at research@apm.org.uk

9. APM 2018 research themes and priorities

1. **New emergent themes or knowledge gaps** that directly impact project delivery. These might include: Temporary Multi-Organisations (TMOs); the role of agile within the wider world of project management; delivering digital transformation; the use of data and analytics in improving project delivery, particularly in the use of project controls and planning; Future Project Management skills and competences; and project management in the boardroom – governance and accountability at the C-suite and among senior management, for example.

2. **Project management markets or sectors:** this includes cross-sectorial comparisons and differences, exploratory studies of new and emerging project management markets or sectors, and deeper dives of project management within more traditional project management sectors or markets.

3. **External issues that may affect project management delivery** indirectly might include: virtual teams, cross-cultural issues, supply-chain management, project management in the context of government policy, for example, Brexit or UK Industrial Strategy, and climate change and sustainability.

A more detailed list of APM's research themes and priorities for 2018 is available on the APM research section of the website.

For further information, please visit apm.org.uk/about-us/research/research-fund

10. CPD reflective questions

■ How important is research and policy in your work? Consider how these outputs could be best used or disseminated within your organisation to help contribute to knowledge development and how might you help APM shape this going forwards.

■ How can APM better support Early Career Researchers and doctoral students?

■ The engagement of corporate and individual practitioners is key in driving and supporting research and bridging the gap between theory and practice. With this in mind, what role should corporates play in shaping and developing new research and policy, and how can this be best achieved?

■ As we increase our understanding that the role of time plays a critical part in understanding projects, what will this mean for the type of practitioner we need for the future?

■ As the project profession develops, how can we go beyond an 'execution view' of project management, and what might this mean for new areas of research?

APM – continuing professional development

"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"

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 apm.org.uk/qualifications-and-training/continuing-professional-development

11. 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.

"APM is publishing a series of thought-leadership papers for the benefit of members, as well as interested stakeholders"

"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 wellbeing. 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.

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

For further information, please visit apm.org.uk/research

Please contact us with your views and suggestions: research@apm.org.uk

"In this era of constant change and the increasing public expectation that professionals are updating their skills, CPD becomes ever more important"