

# Standards: The Rallying Cry of a Growing Profession

by Jeannette Cabanis, Acting Editor-in-Chief  
PMI Publishing Division  
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Long ago and far away there was a minor Frankish ruler with big ideas, Charles by name. In the beginning he wasn't, strictly speaking, even a king, but in his brief 46-year life, he managed to conquer the Lombard kingdom in Italy, subdue the Saxons, annex Bavaria, exert power over parts of Spain and Hungary, unify nearly all of Western Europe, establish his court at Aix-la-Chappelle (now Aachen) as the intellectual center of the continent, and get himself named Holy Roman Emperor. Though no scholar himself—he could barely speak Latin—he collaborated with the greatest scholars of his time to codify his ideas on governance. "King Father of Europe" one court poet named him and, indeed, for centuries since, Charlemagne has been considered the prototype of a Western monarch. One might even say he set the standard.

Why this excursion through history? Well, by an interesting coincidence of etymology, the word "standard" has its roots in an old Frankish war cry: *standhard!* Since then, the word, and the ideas associated with it, has come down to us through various usages and perspectives. The *American Heritage Dictionary* says a standard can be the banner or ensign around which an army rallies in battle ... a criterion or acknowledged measure of comparison for quantitative or qualitative value ... an object that under specified conditions defines, represents, or records the magnitude of a value ... a degree or level of requirement, excellence, or attainment ... a pedestal, stand or base upon which something valuable is displayed. Additionally, it can mean that something—a practice, a tool—is widely recognized, commonly employed, or conforms to established, educated usage. *Standard* even appears in the dictionary as "the commodity used to back a monetary system": solid gold, in other words. Obviously, Charlemagne's Franks set the standard not just for empire-building, but for the idea of standard-setting itself. In the famous treatise *Epistula de litteris colendis* (A.D. 785?) the medieval king, speaking through the legendary scholar Alcuin, made a stab at expressing the idea behind a standard: that "right thought ... must be clothed in the appropriate form and language, lest it be falsified."

So what does all this have to do with project management?

The dictionary lists these synonyms for *standard*: benchmark, criterion, measure, touchstone. The central meaning shared by all these nouns is "a point of reference against which individuals, organizations, products and processes are compared and evaluated"; each of these words gives us a glimpse into the many roles standard-setting plays in our professional lives.

**Benchmark.** We assess value by making comparisons among professionals, organizations, processes and products as to performance, practices and credentials. Since the beginning of time, projects have been executed by a vast variety of people using an even vaster variety of methods, tools and techniques. At present, anyone can claim to be involved in project management. This claim could signify anything from a nodding acquaintance with scheduling software to a doctorate in technology

management. Any company can say they use project management, without checking off a list of industry-standard tools, terminology, or practices. It's easy to see how this can erode the professional status that project management practitioners have long struggled to win.

**Criterion.** To the ancient Greeks it was *kritêrion*, to separate or judge. By establishing criteria for evaluations, we develop a way to judge the professional activities of individuals or organizations. Do they use common practices, as recognized by the project management community? Do they comply with the approaches that their peers have established through a long process of consensus-building?

**Measure.** A measurement is an objective tool for gauging performance. Is the organization measuring itself by the industry-standard model? Do its personnel follow common approved project management procedures? What value can an organization expect to receive from its investment in project management? Good measurements mean a company can judge how well project management is performing; they also give the individual professionals a tool for self-development and evaluation.

**Touchstone.** A touchstone is something one comes back to for a reminder of what is real, agreed upon—something that identifies what is genuine. Using standards as a touchstone, the project management practitioner can check in with the project management community, seeking validation that his or her practices are all they should be, or verify the definitions and use of terminology, and correct course as necessary.

### **The Role of Standards in Building a Profession**

**Securing the Market.** This concept of standards—in education, in language usage, in the practice of a profession, in the conduct of professionals, in the manufacture of products—has been a subtle engine driving the trends of modernization and industrialization ever since Charlemagne's time. Medieval guilds established quality and competency standards to consolidate their power and preserve their markets. Victorian-era "gentlemanly professions" like law and medicine sought the backing of legislation to make their standards inviolable—and preserve their markets, while benefiting society. Product standards governing the manufacture of items like bolts and electrical outlets made mass production possible and catapulted Western industrial economies to the top of the heap and, according to the American National Standards Institute, the continuing standardization of products is critical for success in global markets:

*Interest in standardization has expanded from the engineering offices to the executive offices. Recently Industry Week magazine referred to standardization as the "sleeper issue of the '90s." Strategic use of standardization is a management tool as well as an instrument for developing a blueprint for the future. By using standardization to streamline processes and trim costs, businesses can secure a competitive advantage, and remain competitive in the face of national and global market changes.*

If I seem to be repeating myself, it's only a demonstration that, when it comes to setting standards, the lofty goals of protecting the consumer and building

professionalism are only part of the story. Standards make good business sense. Today, poised on the threshold of a post-industrial service and knowledge-based economy, standards have become more important than ever. After all, a consumer of knowledge-based services must have some yardstick by which to understand the approach to the service. And that's where process standards—PMI's *A Guide to the Project Management Body of Knowledge*, for one—come in. A process standard provides guidance about the knowledge, tools and techniques that are useful in the practice of the profession. It's all that "stands" between the consumer of professional services and a "falsified" version of those services. It is quite literally right thought about how work should be done, expressed in the right language. As such it provides value to both professionals and their clients.

**Expressing Social Responsibility.** Everyone is familiar with product standards, but process standards are more difficult to understand because they are more complex. Because of the deep connection between process standards, ethics, and professionalism, discussions about such standards can quickly become bogged down in value judgments. It can be hard to separate out, in a systematic way, the best-in-class steps in a process. Nevertheless, such systemization of practices is good for purveyors of services and for the public. The public good may seem like a non sequitur, but in fact, an orientation toward social responsibility is one of the hallmarks of a profession. The knowledge and practices of project management are used to develop products used by people, from health care programs to bridges. Thus, having standards for how a project could be or should be managed can ultimately impact the wellbeing, even the safety, of end-users. Taking an interest in standards is thus not only good business, but also a good thing.

**The Willingness to Self-Regulate.** In March 1998, the Project Management Institute (PMI®) asked Knapp & Associates International, Inc. to prepare a brief report discussing how professionals establish and advance their bodies of knowledge: asking, in essence, how do professions evolve? The report focused on five established professions: law, medicine, accounting, architecture, and nursing. The study surfaced some interesting notes on the role of standards in refining and elevating a profession.

Most professions have a self-regulatory aspect: through codes of ethics and voluntary performance and practice standards, the members of the profession police themselves and their work. This behavior gives professions, as Paul Starr noted in his Pulitzer-prize-winning book, *Social Transformation of American Medicine* [Basic Books 1971], "a distinctive basis of legitimacy." They act not as individuals but as representatives of a community of shared standards. Over time, this authority may become institutionalized in a system of formally defined education and licensing, further legitimizing the profession.

**A Sign of Maturity.** In all the professions studied, both established and evolving, clearly articulated standards define the professions, but not usually until the practices have become mature. In architecture, for example, which has been recognized as a profession since the beginning of the twentieth century, articulation of contemporary standards did not begin until 1940. Martin Moeller, executive director of the American Association of Collegiate Schools of Architecture, interviewed for the Knapp study, noted that architecture is essentially a hybrid profession, incorporating elements from art, engineering, history and mathematics, to name only a few. The interdisciplinary nature of architecture creates a challenge in

defining its body of knowledge and its appropriate standards. In this, the history of architecture as a profession mirrors that of the "art and science" of project management. Thirty years after the establishment of its first professional association, the profession of project management is further reemphasizing the articulation of its standards.

### **PMI and Standards: History and Futurism**

With PMI's documentation of the project management body of knowledge during the '80s, the publication of *A Guide to the Project Management Body of Knowledge (PMBOK™ Guide)* [PMI, 1996], and its designation as a PMI Standard, the Project Management Institute has further established its role in advancing the profession of project management. In 1998, PMI was recognized by ANSI as an Accredited Standard Developer.

**The PMBOK™ Guide.** PMI's only official standards document at present, released in 1996, represented a significant update from its predecessors, because the body of knowledge of the profession had grown substantially in the intervening years. The importance of this document to the spread and standardization of project management practices can be inferred from the sheer numbers of copies in circulation: since mid-1996, nearly a quarter-million *PMBOK™ Guides* have been purchased, downloaded from the PMI website, or distributed to PMI members, and that number increases by over 10,000 each month. Furthermore, the Institute of Electrical and Electronics Engineers Inc. has adopted the *PMBOK™ Guide* as an IEEE Standard.

**Current Initiatives.** PMI is working on developing, in the words of PMI Standards Program Member Advisory Group volunteer John Schlichter, "a family of standards" that address the major concerns of the project management community. Said Schlichter, "PMI '98's working session on standards was the fuzzy front end of a massive effort to develop new standards for the profession." Since then, volunteer teams have been hard at work on numerous projects:

- **Updating *A Guide to the Project Management Body of Knowledge.*** Since its publication, comments have been collected. In addition, comments were solicited from the membership in early 1998. An Exposure Draft is expected to be completed this year, with publication of the update in 2000.
- **Extensions to *A Guide to the Project Management Body of Knowledge.*** A project team sponsored by the PMI Information Systems Specific Interest Group has developed a working draft. The document is undergoing review in accord with the PMI Project Management Standards Setting Policy and Procedures. Other extensions are in earlier stages of consideration and development.
- ***Organizational Project Management Maturity Model.*** The project team has reviewed existing maturity models and is preparing to survey organizations to identify organizational capabilities and enablers of project management and develop requirements for the model. Project activities have been covered in several recent issues of both *PM Network* and *PMI Today*.
- ***Work Breakdown Structure Practice Standard.*** This project team is developing a document to describe how to prepare and use a work breakdown structure. The team has created a preliminary draft, which is being reviewed initially by the Standards Member Advisory Group for its intent and content.

Additional reviews and revisions are planned toward the creation of an Exposure Draft later this year.

- **Project Manager Competencies.** The purpose of this project is to build a framework for professional development that will describe the clusters of knowledge, skills, abilities, and other personal characteristics that are likely to be relevant to most, if not all, types of projects and that can be improved through training and development efforts. This virtual project team is engaged in idea generation, information gathering and concept creation as part of an extensively developed project plan.
- **Project Taxonomy.** A project taxonomy is a systematic classification of project types that have characteristics or traits in common. An accepted project taxonomy can be a beneficial prerequisite for project and personnel development and assessment, along with a highly useful tool to help generate comparable project management research. Information gathered and concept generation on this complex topic was initiated in 1998 and is continuing in 1999.
- **Project Management Principles.** A principle is "a basic truth, law, or assumption." What are the principles that support good project management? This project team has created an initial discussion draft. Additional discussion about the intent and content of this project is under way.

Other projects are under consideration. Another PMI Project Management Standards Program All Day Open Working Session will be held at PMI's 1999 Seminars & Symposium in Philadelphia, on 10 October (information is contained in the PMI '99 Registration Brochure). For additional information about the PMI Project Management Standards Program, check out the Standards website at [www.pmi.org/standards](http://www.pmi.org/standards); additional volunteers are welcome.

But back to Charlemagne: he has one more lesson to teach us. So potent was the magic of his standard-setting in the area of kingship that to this day both French and Germans claim him for their own. Standards-setting offers an intriguing dichotomy—it can be both intellectually stimulating and divisive. As long as we stick to "clothing right thought in appropriate form and language" we'll be doing the profession a service and enhancing the evolution of the profession—a lofty mission with lasting impact.

### **ANSI: Coordinating Standardization**

Standardization is, for the most part, a grassroots, democratic process that results from businesses and organizations choosing voluntarily to develop guidelines for themselves. But without a central forum for the recognition of standards, democracy would quickly devolve into chaos.

The American National Standards Institute (ANSI) serves as that coordinator. Since 1918, ANSI has overseen the United States' private sector voluntary standardization system. A diverse constituency of private and public sector organizations supports the private, nonprofit membership organization.

The ANSI Federation's primary goal, according to materials published on the website ([www.ansi.org](http://www.ansi.org)) is "the enhancement of global competitiveness of U.S. business and the American quality of life by promoting and facilitating voluntary consensus standards and conformity assessment systems and promoting their integrity." ANSI does not itself develop standards, but facilitates development by establishing consensus among qualified groups, while ensuring that its guiding principles—

consensus, due process and openness—are followed by the more than 175 entities accredited under one of the Federation's three methods of accreditation (organization, committee, or canvass).

As a founding member of the ISO, ANSI both promotes the use of U.S. standards internationally, and encourages the adoption of international standards as national standards where these meet the needs of the user community.