

Getting Up to Standard

by Jay Holtzman
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American industrialist Henry Ford said, "If you think of standardization as the best that you know today, but which is to be improved tomorrow, you get somewhere." The same can be said of standards within the project management profession. By establishing proven and accepted standards today, project management professionals can be better prepared for the challenges of the future.

In September, the American National Standards Institute (ANSI) approved PMI's *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* as an American National Standard. It represents a noteworthy accomplishment for the profession and becomes a springboard for achievement into the future.

Standards development is an integral and necessary part of the development of most professions if they are to be recognized as legitimate and distinct. Standards certainly have played a role in the development of law, medicine, accounting, architecture and nursing as professions, according to a report prepared for PMI® by Knapp & Associates International in 1998.

Standards define a profession and help it grow. Additionally, standards allow a profession to regulate itself and the activities of its members, and help express the profession's social responsibility, a hallmark of many professions. (For a more detailed examination of the role of standards in the building of a profession, see "Standards: The Rallying Cry of a Growing Profession," *PM Network*, May 1999.)

ANSI approval of the *PMBOK® Guide* was part of an ongoing process that stretches back at least 15 years to the initial effort to describe the project management body of knowledge. The immediate previous step was ANSI acceptance of PMI as an ANSI Accredited Standards Developer (a body qualified to write standards). Judith Doll, PMP, and Cynthia Berg, PMP, both of the PMI Standards Member Advisory Group, spearheaded the recent drive to win ANSI acceptance for the *PMBOK® Guide*. The project started about two-and-a-half years ago.

"We drew up a project charter and a scope statement," Doll said. "We got together as a committee and determined what our timelines were and agreed on our requirements, costs, benefits, and so on. We went through it like you would a regular project, the way the *PMBOK® Guide* expects you to."

From the beginning, this was understood as a two-step process, according to Berg, with acceptance of PMI as a standards-setting organization as the first step. ANSI accepted the Institute in October 1998. The next year was spent on the application procedure for approval of the standard itself.

"There are a number of applications," Doll explained, "that you have to get together and fill out, along with supporting documentation regarding your standards: How are they written? Who contributed to them? How are they reviewed? Was there an open review process allowing people to review and comment? How were any comments dealt with?"

Berg said it was the process by which the organization does its work that required time, attention, and clarification: "The toughest part was establishing our own internal organizational processes in compliance with ANSI guidelines. It wasn't so much a question of making changes as it was of formalizing a process so that you are saying, 'From this day forward this is the way we are going to do business.' Although we had a loose set of operating principles prior to this, we didn't have a totally documented method for how standards were done."

ANSI accreditation and having the *PMBOK® Guide* accepted as an American National Standard confer a number of benefits on the project management profession as well as on the stature of PMI as a leader for the profession.

ANSI is a private, nonprofit membership organization focused on meeting the standards and conformity assessment requirements of its diverse constituency, according to materials published by the organization. It serves as a neutral, unbiased forum for the development of consensus agreements on technical, political, and policy issues and is a representative of U.S. interests to national, regional, and international bodies.

The organization, founded in 1918, serves as the coordinator for the development of voluntary standards by a broad variety of business, industrial, professional, testing, and governmental organizations. ANSI is also the U.S. representative to the International Organization for Standardization (ISO). In its international role, ANSI carries forward U.S. technical, political, and policy messages to the ISO and facilitates the development of allied relationships with regional organizations such as the Pan American Standards Commission and the Pacific Area Standards Congress.

"I think it really establishes us as an acknowledged profession because we have a government standard behind us saying this is one of the ways we accept for doing this type of activity," Berg said.

"As a project manager myself, I like to know that the guide I am using is not conflicting with any other local standards and that I have something that is recognized as a standard across the world," Doll said. "ANSI offers that kind of assurance." This is particularly important at a time when many project management professionals find themselves involved in projects that stretch across countries and continents, she added.

ANSI accreditation also provides PMI with participation in both national and international standards arenas, Berg and Doll believe. As a representative to the ISO and the International Accreditation Forum, ANSI can represent PMI and apprise the Institute of global issues that affect or compete with PMI standards.

"The *PMBOK® Guide* offers a common perspective and understanding that everyone is now operating on the same wavelength," Doll says. "It provides a cohesive unity as far as a common perspective on how to approach a project and a common set of criteria and expectations about developing your scope statement, managing time commitments, human resources, quality management, and so forth."

Perhaps more important than acceptance of the standard is that PMI embraces formalized methods by which standards are developed, according to Berg: "It isn't just a matter of getting accreditation. It is a matter of having a process that is

documented so that all standards products are reviewed by the same process. It holds the PMI Standards Program up to the question of how are we going to do business now and forever. And by requiring a standard method of operation, it is giving the project management community a more professional body of standards."

"The *PMBOK® Guide* is a de facto global standard because people like it, use it, and it has received widespread distribution—more than 300,000 copies in circulation," said Lewis M. Gedansky, Ph.D, PMI's manager, Technical Research and Standards. "But its approval by ANSI as an American National Standard significantly increases the level of credibility behind the work. It also provides a basis for other countries to approve the *PMBOK® Guide* as their national project management standard.

"PMI has been following an evolutionary process and these recent steps increase the credibility of the profession in general and PMI's credibility as a standards-setting organization. The ANSI process is a difficult one to understand [and successfully going through the process is] largely a question of the energy of the volunteers. All of our volunteers have full-time jobs, and they do this work on the side. It takes a real dedication to the profession and a real commitment of time to take on these challenges."

The origins of the *PMBOK® Guide* reach back to 1983 and the Report of the PMI Ethics, Standards, and Accreditation (ESA) Project. This document outlined six major project management areas: human resources management, cost management, time management, communications management, scope management, and quality management. Additionally, the report dealt with ethics and standards appropriate to a project management professional. The report served as a foundation for PMI's Certification Program.

It was also the precursor to the *PMI Project Management Body of Knowledge (PMBOK®)* that was first published in *PM Network* in 1987. Two new project management knowledge areas—risk management and procurement management—were added to this document as the result of membership comments on the draft. The *PMBOK® Guide* superseded this document in 1996. Here, a ninth knowledge area—project integration management—was added. It is this *PMBOK® Guide* that now stands as an ANSI American National Standard.

ANSI acceptance means that the profession now has a proven and reviewed set of standards on which to rely. In this day of globalization of corporations, more and more organizations are relying on standards to assist them in doing business.

"Many diverse industries accept and rely on ANSI Standards to help them establish their processes and tolerances," Berg said. "As PMI increases global visibility, standardization issues continue to grow more complex. Standards are critical to the survival of companies marketing to multiple nations."

The Value of ANSI Accreditation

Several years ago the PMI® Standards Committee identified the need for and value of ANSI accreditation of PMI standards. Why? Because ANSI:

- Accreditation enhances the credibility of PMI and its standards documents. Many

industries accept and rely on ANSI standards to help them establish their processes and tolerances.

- Plays a key role in providing PMI participation in both national and international standards arenas. Through representation to ISO, the International Accreditation Forum, and organizations such as the Pan American Standards Commission and the Pacific Area Standards Congress, ANSI has the ability to represent and apprise PMI of global issues that affect or compete with the Institute's standards.
- Accreditation promotes use of documented procedures in business processes as practiced by PMI (process conformity assessments). ANSI requires its members to document and comply with processes that are in accordance with ANSI cardinal principles.
- Accreditation reinforces PMI's dedication to its membership and other practitioners of project management by the formal acceptance of ANSI's Cardinal Principles: *Openness*—Any materially affected and interested party has the ability to participate. *Balance and Lack of Dominance*—Consensus body shall be representative of the members and affected parties. *Due Process*—All objections shall have an attempt made toward their resolution. Interests who believe they have been treated unfairly shall have a right to appeal. *Consensus*—More than a majority but not necessarily unanimity.
- Facilitates communication and information exchange among its members. ANSI's membership councils, standards boards, and planning panels are neutral forums where members identify, discuss, and agree upon solutions to standards and conformity assessment issues. Their forums bring together parties with like interests for mutual benefit.
- Provides increased market access to PMI by standards developers and other interested parties, through advertising of standards, through online listings, and biweekly and monthly newsletters.

As international standardization continually affects every business sector, there is an increasing need for more representation and participation in the ANSI federation because products must function and be acceptable in different cultures, value systems, and environments. PMI is committed to providing globally acceptable products in the arena of project management and recognizes that ANSI can help us achieve that goal.

—Judith Doll, PMP, and Cynthia Berg, PMP, members, PMI Standards Member Advisory Group