


PMI Standards
A Time of Fundamental Change

Chris Cartwright MPM, PMP
Member PMI Standards MAG



Moscow 20th PM Conference September 2011



Agenda

Context
Research Informed Standards
Portfolio
Program
PMBok
Lexicon
OPM3
Participation

Moscow 20th PM Conference September 2011



PROJECT MANAGEMENT TRENDS




Project Cancellations and Restarts

Results from the quarterly PMI Economic Pulse Survey show that the percent of firms canceling projects (due to economic conditions) has decreased since the height of the global recession. However, the figure remains over 40% as of the end of third quarter of 2010.

On a more positive note, one if five say their firms have restarted projects that were canceled or delayed during the recession.

Source: PMI Economic Pulse Survey

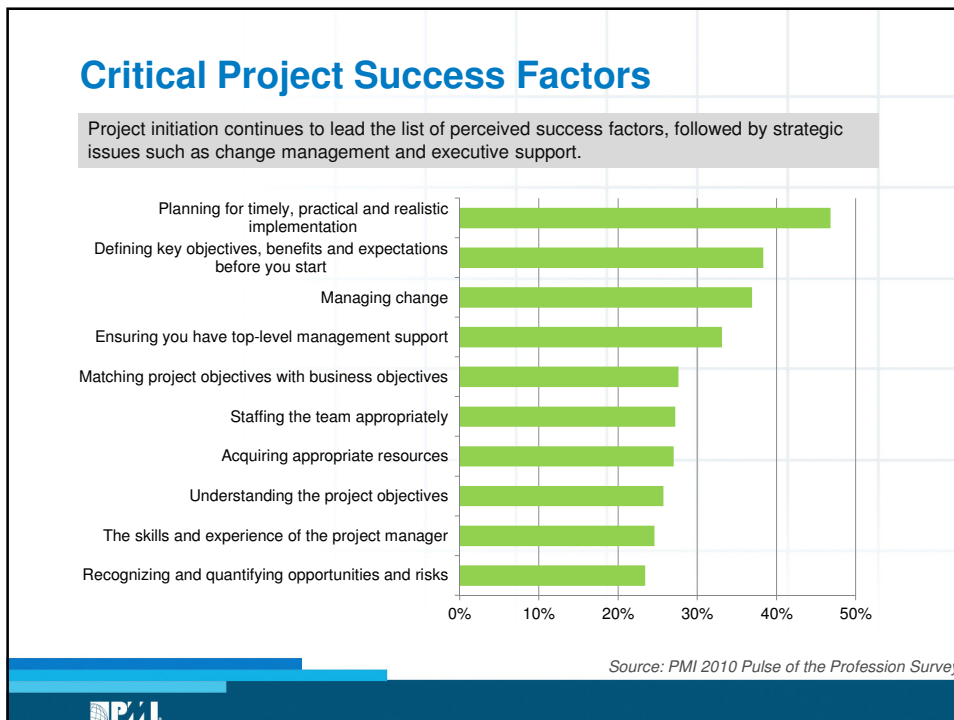
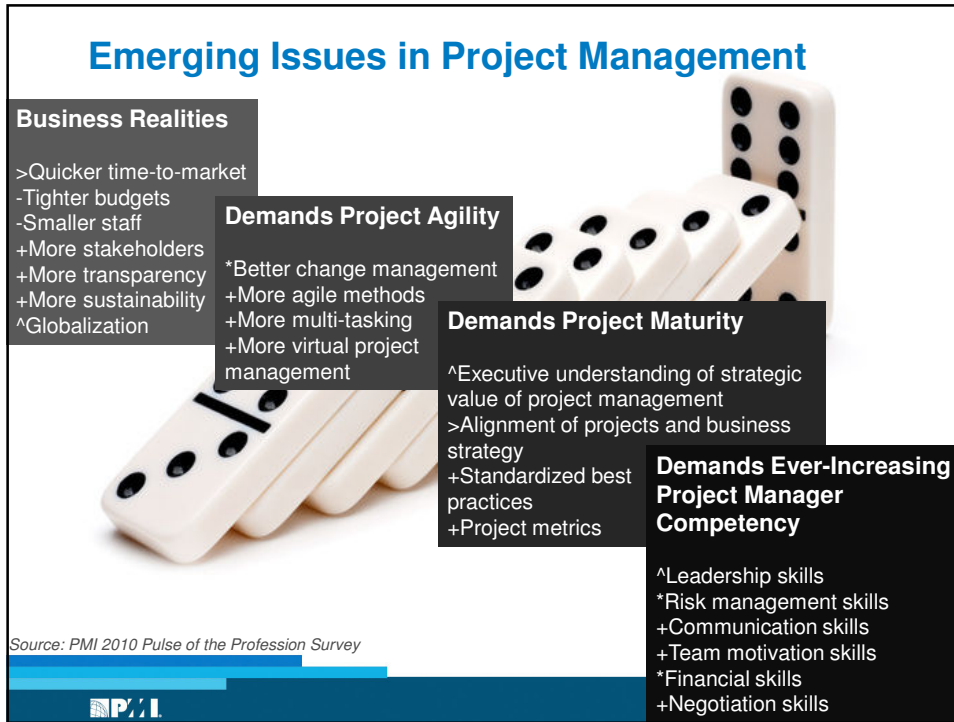


Project Cancellations

54%	55%	54%	48%	47%	41%	46%
2009 Jan-Mar	2009 Apr-June	2009 Jul-Sep	2009 Oct-Dec	2010 Jan-Mar	2010 Apr-June	2010 Jul-Sep

Project Restarts

21%	18%	21%	21%
2009 Jan-Mar	2009 Apr-June	2009 Jul-Sep	2009 Oct-Dec



PMI Standards Library

Category	TITLE
PMI Global Foundation Standards / PMI American National Standards	A Guide to the Project Management Body of Knowledge (PMBOK® Guide)
	The Standard for Program Management
	The Standard for Portfolio Management
	Organizational Project Management Maturity Model (OPM3®)
PMI Global Practice Standards	Practice Standard for Earned Value Management
	Practice Standard for Scheduling
	Practice Standard for Project Configuration Management
	Practice Standard for Project Risk Management
	Practice Standard for Work Breakdown Structures
PMI Global Standard Application Area Extensions	Practice Standard for Project Estimating
	Construction Extension to the PMBOK® Guide
	Government Extension to the PMBOK® Guide
PMI Standards Adjunct Products	Software Development Extension to the PMBOK® Guide (Currently being developed)
	Project Manager Competency Development Framework
	PMI Project Management Lexicon (Currently being developed)



Standards Member Advisory Group (MAG)

- MAG Responsibilities:
 - Advise and support PMI with the annual standards program
 - Provide professional input regarding programs and projects
 - Help recruit PMI volunteers for standards projects
 - Assist in the communications of the program
- MAG members are selected by the PMI Standards Manager to serve up to five consecutive one-year terms. PMI membership is not required.



Standards Member Advisory Group (MAG)

- 2011 MAG Members:
 - Monique Aubry, PhD, MPM
 - Margareth F.S. Carneiro, PMP, MSc
 - Chris Cartwright, MPM, PMP
 - Terry Cooke-Davies, PhD, BA, FAPM, FCMI, FRSA
 - Laurence Goldsmith, PMP
 - Paul E. Shaltry, PMP



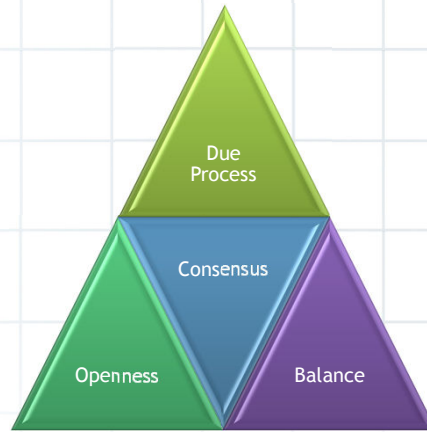
Standards Program Accreditation

- ✓ *In October 1998 PMI was accredited as a Standards Developer by the American National Standards Institute (ANSI), reaccredited in 2001 and again in 2006*

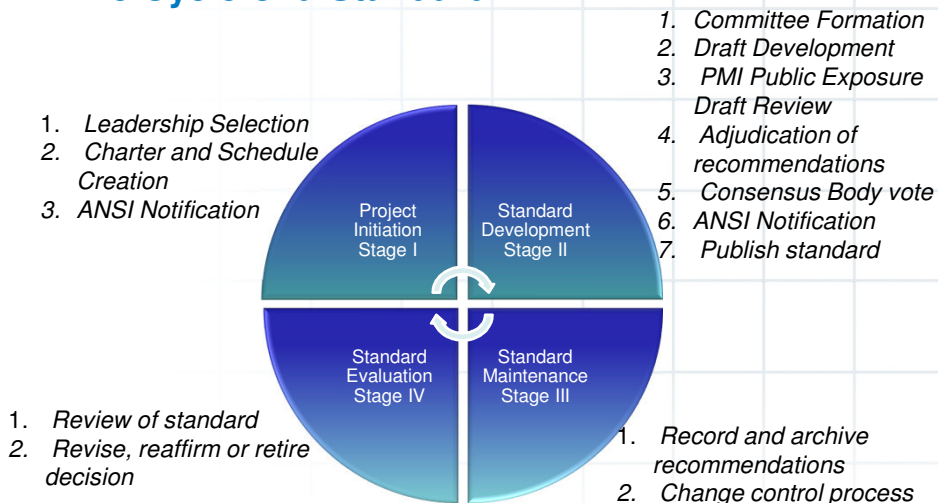


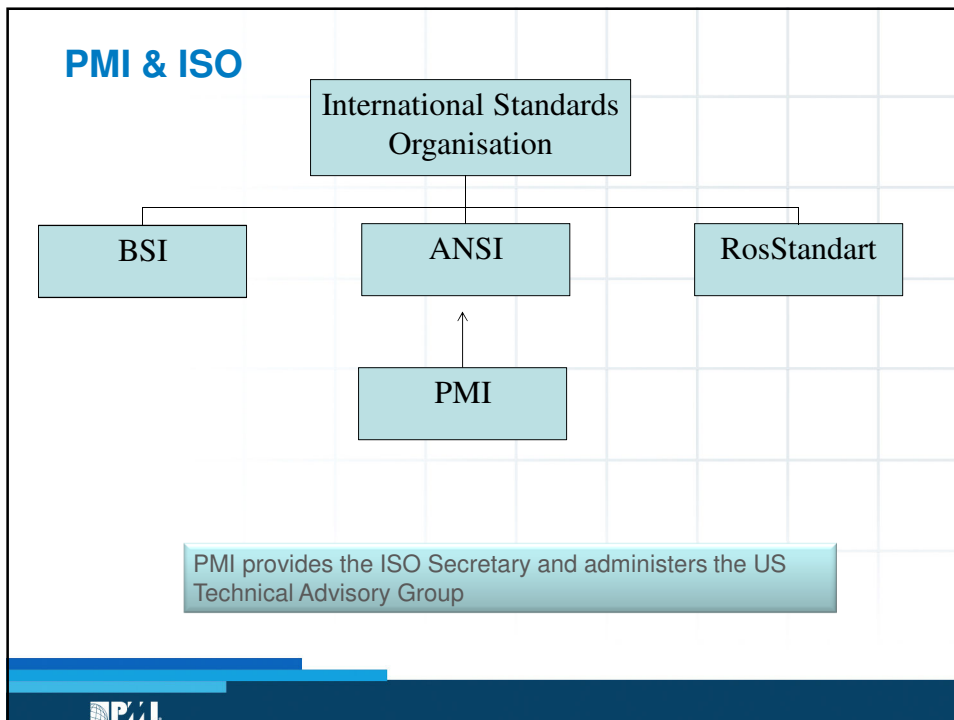
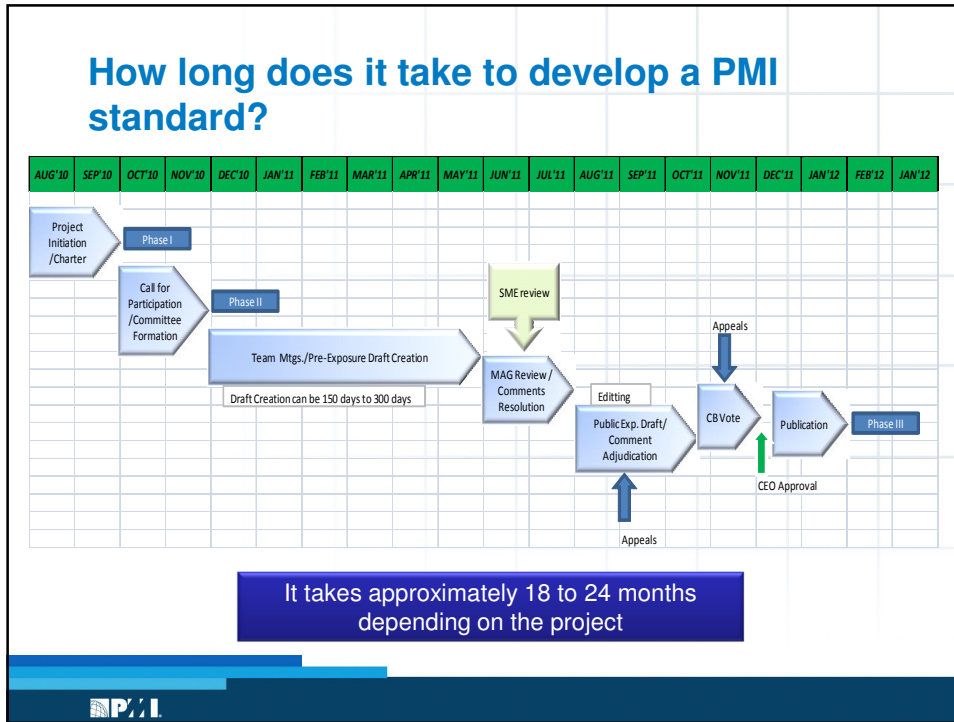
PMI Standards Operating Principles

- **Openness** – Participation shall be open to all interested parties
- **Balance** – Providing an opportunity for fair and equitable participation without any dominance by any single interest
- **Due Process** – Providing opportunity for public comment, with prompt consideration given to views and objections including an appeals mechanism
- **Consensus** – Ensuring substantial agreement has been reached by directly and materially affected interests



Life Cycle of a Standard





PMI External Standards Activities – ISO/PC236 and ISO/TC258

ISO/PC236 - Project Management

- An ISO Project Committee (PC) has a limited scope with a single work item
- ISO/PC 236 is working on ISO 21500 - Guidance to Project Management
 - ✓ Based on PMI contribution of *PMBOK® Guide* Ch. 3 and Glossary
- Publication date for ISO 21500 is slated for Q3 of 2012

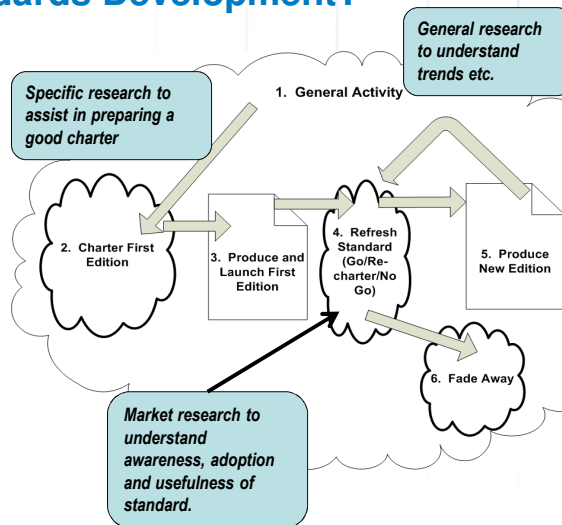
ISO/TC258 – Project, Programmed, Portfolio Management

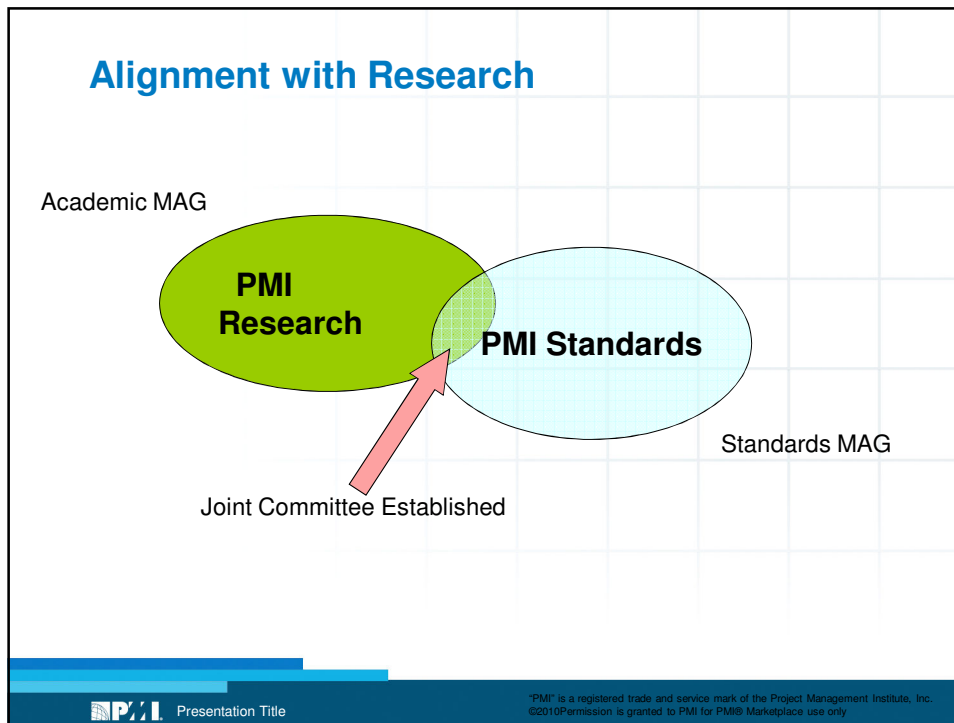
- An ISO Technical Committee (TC) has a more extended scope than a PC, with the possibility of multiple work items
- TC formation approved in Nov'10
- First plenary Jun'11
- Next plenary Feb'12

PMI provides the ISO Secretary and administers the US Technical Advisory Group



What Part Should Research Play in Standards Development?





What are Research Informed Standards?

In 2010, Standards Program established the RIS program as a 'knowledge management' enhancement of standards development.

RIS adds various types of credible research information into the standards development process.

Types of Standards research needs:

- Detect and monitor trends in the profession to support Standards Portfolio Strategy*
- Supply information needed for specific existing standards*
- Supply information needed for a specific proposed standard*

Research may be longitudinal or ad hoc, and timed to support Standards Program needs for decisions

PMI Presentation Title

PMI is a registered trade and service mark of the Project Management Institute, Inc. ©2010 Permission is granted to PMI for PMI® Marketplace use only

RIS Project Proposals – Top 3

1. Applicability of the four foundational standards within small and mid-size organizations
 - Develop an integrative framework for organizational project management standards
 - How do organizations go about building PM capabilities?
 - Costs and benefits of implementing a formalized PM program



Justification:

- In the US, small organizations represent 99.7% of all employer firms
- Motivations for PM may be different for smaller firms or mid-size firms

RIS Project Proposals – Top 3

2. What valid and reliable research published in the past 10 years relates to PMI's 4 foundational standards
 - How agile are PMI's Standards
 - Graphical mapping/tabular assessment of research findings to specific elements of the big 4
 - Summary of findings and recommendation for frequency of repeating the project



Justification:

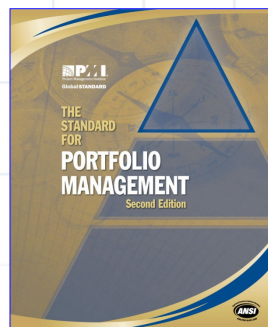
- Findings would help inform decisions regarding updates of foundational standards and related work
- Form a model for future inquiry
- Basic element for evolving a good RIS program

RIS Project Proposals – Top 3

3. Portfolio Management Standard
 - Ascertain existing portfolio management standards
 - Understand the challenges faced by organizations
 - Understand the experiences organizations have when seeking to implement portfolio management

Justification:

- Understand where the Standards for Portfolio Management fits into its universe
- Ensure that the standard addresses the correct issues
- Broaden appeals



Portfolio Standard Update

- Factor feedback from deferred Second Edition Exposure Draft and post publication comments into update
- Reposition Chapter 3 (*The Standard for Portfolio Management*) as a stand-alone standard
 - Updates in Process Groups & Knowledge Areas will be needed
- Consistent with the content and philosophy of the *PMBOK® Guide*, *The Standard for Program Management*, *OPM3®*, and *Lexicon*

Committee Chair: Jen Skrabak

Portfolio Standard Update – We are aligned with overall Publication Date of Dec 2012

Key Milestones	Timeframe
Charter Signed	August 2010
Core Team Confirmed	September 2010
Sub-Teams /Framework Development	October – December 2010
Core Team Face to Face Meeting	November/December 2010
Content Development	January 2011 – September 2011
Exposure Draft (incl Preparation, Adjudication, Finalization)	October 2011 – June 2012
Final Publication	December 2012

Committee Chair: Jen Skrabak



Presentation Title

*PMI is a registered trade and service mark of the Project Management Institute, Inc. ©2010 Permission is granted to PMI for PMI® Marketplace use only

Program Standard Update

Considerations:

- The relationship between and among standards, credentials and role delineation studies
- The relationship between and among Program Management, Portfolio Management and the Program/project Management Office
- Core committee and team membership composed of business/industry representatives as well as individual practitioners



Committee Chair: Eric Norman, PMP, PgMP



Presentation Title

*PMI is a registered trade and service mark of the Project Management Institute, Inc. ©2010 Permission is granted to PMI for PMI® Marketplace use only

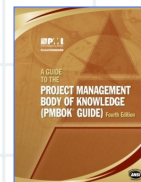
Program Standard Update

Considerations (continued):

- The impact of advancing technology and social networking
- Achieving broad acceptance and adoption

Committee Chair: Eric Norman, PMP, PgMP

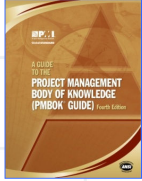
PMBOK® Guide Update



- Major Deliverables
 - Factor feedback from deferred Fourth Edition Exposure Draft and post publication comments into update
 - Reposition Chapter 3 (The Standard for PM) as a stand-alone standard
 - Address key inter-relationships between ISO 21500 and *PMBOK® Guide*
 - Ensure PMI Lexicon terminology is represented consistently and identically in the *PMBOK® Guide*

Committee Chair: Dave Violette

PMBOK® Guide Update



Feedback from Fourth Edition

Need to consider a new knowledge area for

Stakeholder Management

Committee Chair: Dave Violette

PMI Presentation Title

PMI is a registered trade and service mark of the Project Management Institute, Inc. ©2010 Permission is granted to PMI for PM® Marketplace use only

PMBOK® Guide Update

2010											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
								Review Fourth Edition Comment			

2011											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Draft Initial Content			Independent Internal Review			Draft Exposure Draft Content			Prepare Exposure Draft		

2012											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Exposure Draft		Adjudication		Finalization		Final Draft Submitted to PMI					
Committee Chair: Dave Violette						PMBOK® Guide – Fifth Edition published					

PMI Presentation Title

PMI is a registered trade and service mark of the Project Management Institute, Inc. ©2010 Permission is granted to PMI for PM® Marketplace use only

Project Management Lexicon Update

Combined Standards Glossary vs. Lexicon

Variations and inconsistencies across Standards
Lengthy explanations, not definitions

Publications push glossaries to *Combined Glossary*

LEXICON

Definitions
Consistent
Translatable

Glossaries pull appropriate entries from Lexicon

Committee Chair Carol Steuer

Presentation Title

PMI is a registered trade and service mark of the Project Management Institute, Inc. ©2010 Permission is granted to PMI for PMI® Marketplace use only

Project Management Lexicon - Update

What is a Lexicon?

- “Term” – a word or phrase
- “Definition” – the meaning or significance of the term within a specific field
- “Self-consistent” – terms used in a definition are consistent with how they themselves are defined
- “Unlike an encyclopedic description or an explanation, a *definition's* main purpose is not to provide a means for a complete understanding of a given *concept* but rather to provide enough understanding so as to avoid confusing the *concept* in question with other related *concepts*.”
(ISO 704: 2009)

Committee Chair Carol Steuer

Presentation Title

PMI is a registered trade and service mark of the Project Management Institute, Inc. ©2010 Permission is granted to PMI for PMI® Marketplace use only

Lexicon Project Charter – 3 Phases

Phase I

- Set of principles to determine which terms and variants should be included.
- Process to identify other potential sources of widely-accepted authoritative definitions of terms used in project management and a set of principles for reconciling PMI definitions with these sources.

Phase II – CURRENT STAGE

- Apply the principles and processes developed in Phase I to the terms contained in the glossaries of all 14 of PMI's current standards resulting in Version 1 of the Lexicon.

Phase III

- Guidance on translation into 10 official languages.
- Long term maintenance procedures.

Committee Chair Carol Steuer

Lexicon Phase 1 Report

- Lexicon should only contain foundation terms used within professional project management.
 - Lexicon should be used by lexicographers and Standards teams as a reference source, not as an encyclopaedia.
 - Students of project management would be the best assumption for our audience.
- | Term |
|----------------------------|
| • Definition |
| • Acronyms / Abbreviations |
| • Formula |
| • Synonyms |
| • Variants |
| • Obsolete terms |
| • Related terms |
| • Reference to Standards |

Committee Chair Carol Steuer

Organizational Project Management Maturity Model - OPM3

- **Preface** - will take the readers through scenarios of their current business concern, give them a vision of success
- **Chapter 1** - sets the stage and tone for the rest of this document. It provides the reader with the general concepts about OPM3
- **Chapter 2** - describes the foundational concepts of OPM3. those concepts include organizational project management, the OPM3 model, and process improvement



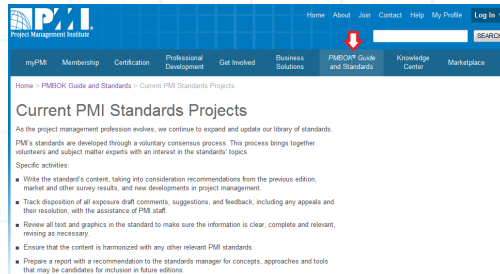
Organizational Project Management Maturity Model - OPM3

- **Chapter 3** is "The Standard". The foundation of OPM3 addresses the core elements of the standard, consisting of the OPM3 construct, process groups/processes, Best Practices and categorizations.
- **Chapter 4** provides a practitioner with the knowledge needed to adopt and assess OPM within a business environment.
- **Chapter 5** explains in detail the inputs, tools and techniques required to plan and execute a OPM3-based Assessment.
- **Chapter 6** describes the necessary activities for evaluating, prioritizing and implementing the best practices.



PMI Standards Participation

- Standards Program Working Sessions
- PMI Exposure Drafts
- Project Proposal Form on PMI.org – Current PMI Standards Projects page
- Visit the Volunteer Opportunities page



Thanks for your participation Chris Cartwright

PMI Standards Participation

Thanks to all at PMI Standards for their input to this presentation

To Contact PMI Standards email John.Zlockie@pmi.org

To contact Chris Cartwright email ccartwright@bigpond.com

