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Certification of PM competences in the Mediterranean area

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Abstract

This paper describes the elements of Project Management competences as identified by the International Project Management Association, and their usefulness in the Mediterranean Area. These 46 elements cover 3 ranges of competences (technical, behavioural, contextual), as it has been proven that knowledge and skill in application of PM processes are far from being enough to give sufficient confidence in the success of a project. The need to adapt an International Competence Baseline to fit national cultures and ways of doing business is further explained. This is even more true in the Mediterranean Area than in any other part of the globe. Formally identifying levels of competence recognises the steps a professional in project management goes through his/her career. Key components of a reliable assessment process are discussed, as well as further competence development.

Keywords: Project management, Mediterranean, Conference, Chios, Greece

1. Introduction

There is today a renewed interest in developing cooperation around projects in the Mediterranean area as a means to contribute to increasing welfare of the local populations and to enhance relationships between the various relevant countries. History has shown some 2,000 years ago that it was possible and relevant.

This effort needs developing PM competences in all countries around the Mediterranean Sea. In the north western part of the area, there is already a considerable amount of PM competences which have been developed in the recent decades through active PM professionals networking together via national PM professional associations. PM Competence Baselines and competence certification

schemes have been established, training programs both in Universities and in industry have been developed.

The issue is now to extend the action to the rest of the area. This is why the International Project Management Association (IPMA), grouping some 50 national associations around the world has formalised a regional subgroup, the Mediterranean Network (Mednet).

2. PM Competences

2.1 Present issues

Today the questions when talking about project management is no longer whether PM is necessary or useful. It is less and less about the techniques to be used as they are largely taught in Universities (and even, in some countries, at school) and as the market is full of training seminars offers. The real question is about quality and competences:

- what constitutes quality in project management?
- What are the necessary competences for project management personnel, at which level and how do they may vary according to the type of the project, to the cultural context in which it is developed, to the phase of the project, to the areas of responsibility of the personnel, ...
- How to assess competences of individuals in relation with expected international standards and actual needs of the projects?
- How useful could be an international recognition of an achieved level of competence?
- How to develop the competences when gaps have been identified?
- Is it possible to measure how good is the management of a project and, if so, how to do it?

2.2 What is competence?

What is a competence? Competence has its origins in the Latin word 'Competentia' which means "is authorised to judge" as well as "has the right to speak";.... so the world hasn't changed so much in this regard.

We're looking for competent project managers to orchestrate project activities. Over the last ten years competence descriptions and competence management have changed Human Resource Management in many organisations.

A competence is a collection of knowledge, personal attitude, skills and relevant experience needed to be successful in a certain role and field of responsibility in practice. To help candidates to measure and develop themselves and to help assessors to judge a candidate's competence, the competence is broken down into competence ranges and elements.

2.3 The need for an international competence baseline

Projects are managed in a world of rapid data transmission and processing and more and more interchanging cultures and economies. Therefore, common concepts are needed to a certain point to ensure understanding while taking into consideration the fact that differences between countries are there to stay: diversity is richness. Accordingly, an international competence baseline, describing the competences expected from PM personnel around the globe shouldn't be a copy of the project management practice in one country, even if it has the strongest economy. That is why IPMA, the International Project Management Association which is the international community of nearly fifty national project management associations, searched for the common level of practice that can be accepted worldwide respecting cultural differences.

As it is now clear in all minds, the basic PM "technical competences", i.e. understanding buzzwords such as project master plan, scope, WBS, planning and scheduling, etc., and knowing how to use the concepts is far from being sufficient to get efficiency in project management. So many organisations have found that, after training their employees on these concepts, their projects results weren't improved! It was found out that it was most of the times due to behavioural and contextual elements which weren't sufficiently addressed.

It was also found out that "project management processes" weren't the panacea. In fact, so many processes other than those identified in the ANSI standard (which is, in fact, the PMI Guide to PMBOK) can be more appropriate for the success of projects. In addition, these processes, which are very logical, are fit when the organisation and the context are appropriate.

Finally, it is clear that if competence elements can be described, even in summarised format, it is important to identify what is expected to have been demonstrated by PM personnel to achieve. And, as any person goes through various (generally up scaling as his/her efficiency is proven) positions in the PM context, there is a need to recognise several levels of competences.

Accordingly, IPMA revised, through a large scale cooperation between PM experts from its member associations, its IPMA Competence Baseline (ICB), and produced ICB3. It includes 46 competences categorised in 3 ranges: technical, behavioural, contextual.

- 20 technical competence elements deal with the project management matter, on which the professionals are working
- 15 behavioural competence elements deal with the personal relationships between the individuals and groups managed in the projects, programmes and portfolios

- 11 contextual competence elements deal with the interaction of the project management team within the context of the project and with the permanent organisations

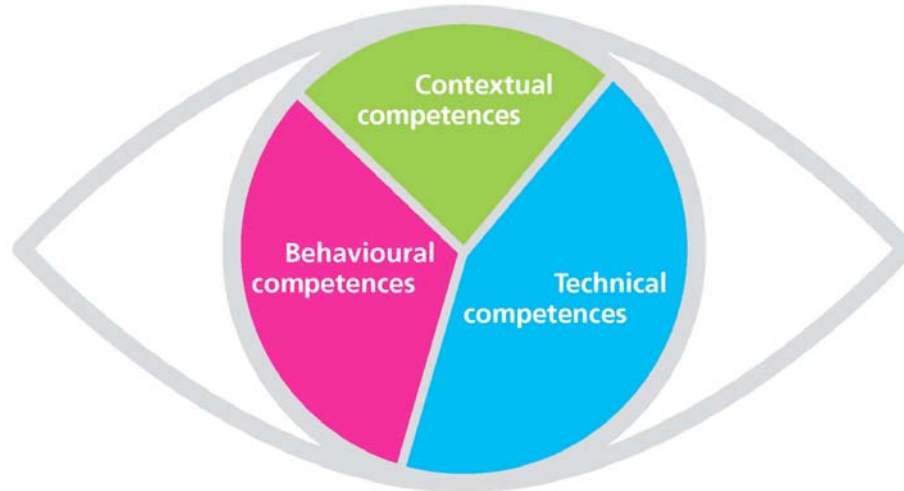


Fig 1: Eye of competence

The eye of competence represents the integration of all the elements of project management as seen through the eye of the project, programme and portfolio management professionals when evaluating a specific situation. The eye also represents clarity and vision.

The ranges are mainly dimensions which together describe the function and which are more or less independent. Each range contains competence elements that cover the most important competence aspects in the particular range. Each competence element includes a title, a description of the content, a list of possible process steps, a list of topics addressed and key competences at each level. The main relations to other elements are listed at the end of each element for comprehensive reading.

The ICB does not recommend or include specific methodologies, methods and tools. The subject areas, generic processes, methods for determining tasks and, where they illustrate the latter well, some examples of methods are described. Methods and tools may be defined by the organisations. The project manager should choose the appropriate methods and tools for a particular project situation.

Technical competence elements		Behavioural competence elements		Contextual competence elements	
1.01	Project management success	2.01	Leadership	3.01	Project orientation
1.02	Interested parties	2.02	Engagement & motivation	3.02	Programme orientation
1.03	Project requirements & objectives	2.03	Self-control	3.03	Portfolio orientation
1.04	Risk & opportunity	2.04	Assertiveness	3.04	Project, programme & portfolio implementation
1.05	Quality	2.05	Relaxation	3.05	Permanent organisation
1.06	Project organisation	2.06	Openness	3.06	Business
1.07	Teamwork	2.07	Creativity	3.07	Systems, products & technology
1.08	Problem resolution	2.08	Results orientation	3.08	Personnel management
1.09	Project structures	2.09	Efficiency	3.09	Health, security, safety & environment
1.10	Scope & deliverables	2.10	Consultation	3.10	Finance
1.11	Time & project phases	2.11	Negotiation	3.11	Legal
1.12	Resources	2.12	Conflict & crisis		
1.13	Cost & finance	2.13	Reliability		
1.14	Procurement & contract	2.14	Values appreciation		
1.15	Changes	2.15	Ethics		
1.16	Control & reports				
1.17	Information & documentation				
1.18	Communication				
1.19	Start-up				
1.20	Close-out				

Fig 2: Overview with all ranges and competence elements

2.4 The need for identified levels of competence

Taking into consideration the actual life in organizations, four typical project management roles and fields of responsibility have been identified.

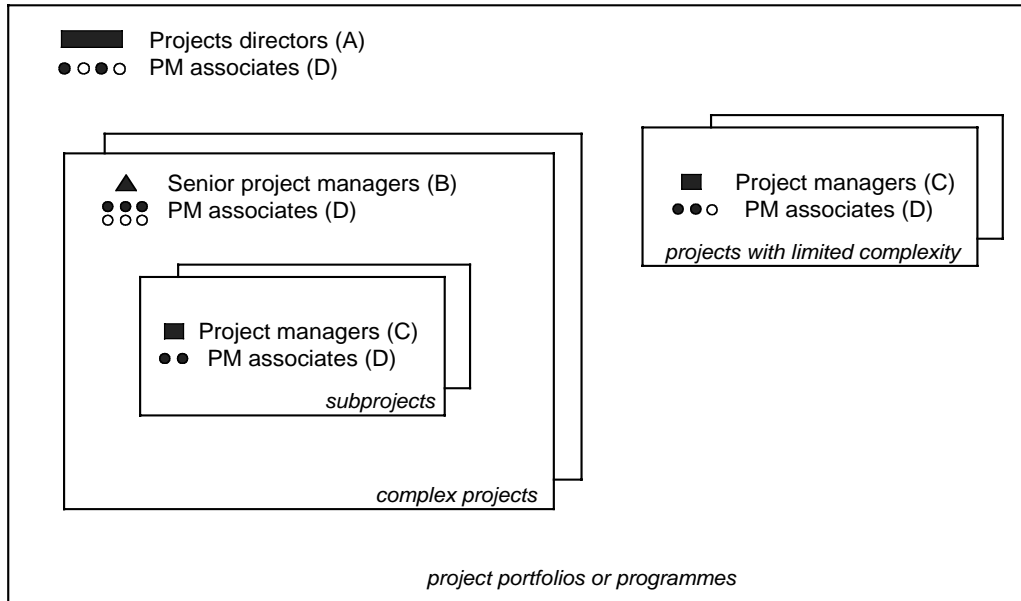


Fig 3: Typical roles and fields of responsibility

The typical management roles and fields of responsibility can be described as follows:

The Portfolio Manager

- reports to the General Management
- attends the strategic project portfolio meetings of the General Management
- chairs the coordination meetings with the programme managers, senior project managers and project managers of the portfolio
- is supported by project management staff and highly recognised experts in project management
- can be substituted by one of his/her programme managers or senior project managers or an executive manager of the General Management

The Programme Manager

- reports to the Portfolio Manager (or to the General Management directly)
- attends the meetings of the steering committee of his/her programme (which may be General Management meetings)
- chairs the coordination meetings with the senior project managers and project managers of the programme

- is supported by project management staff and highly recognised experts in project management
- can be substituted by one of his/her senior project managers or the manager of another programme or the portfolio manager

The Senior Project Manager

- reports to the Portfolio Manager or to the Programme Manager
- attends the meetings of the steering committee of his/her complex project
- chairs the coordination meetings with the subproject managers of his/her complex project
- is supported by project management staff and highly recognised experts in project management
- can be substituted by one of his/her subproject managers or another senior project manager or the portfolio manager

The Project Manager

- reports to his/her Senior Project Manager (if he/she is a subproject manager), or to the Programme Manager, or to the Portfolio Manager
- attends the meetings of the steering committee of his/her project
- chairs the coordination meetings with the team for his/her project
- may be supported by project management staff and highly recognised experts in project management
- can be substituted by his/her senior project manager (if he/she is a subproject manager) or a senior project manager or another project manager

The PM associate

- reports to a Project Manager, or a Senior Project Manager, or a Programme Manager, or a Portfolio Manager, and is supporting him/her
- works as a project management staff member at IPMA Levels C, B, A
- can be substituted by another project management staff member

These levels of competence can be recognised by certificates, as follows:

- **Projects Director (IPMA Level A):** Means that the person is able to direct an important portfolio or programme, with the corresponding resources, methodologies and tools. It is the subject of the certification rather than the management of a single project. To take on this responsibility an advanced level of knowledge and experience would be required. The candidate has shown the effective application of the competence elements for the coordination of programmes and / or projects. The candidate has guided programme and / or project managers in their continuing project management competence development. The candidate has been involved in implementing new or modified competence elements, tools, techniques or methodologies in projects and programmes or portfolios.

- **Senior Project Manager (IPMA Level B):** Means that the person is able to manage a complex project. Subprojects are normal, i.e. the project manager is managing by subproject managers rather than leading the project team directly. The candidate has shown effective application of the competence elements in complex project situations. The candidate has guided (sub) project managers in their continuing development of project management competence.
- **Project Manager (IPMA Level C):** Means that the person is able to lead a project with limited complexity which signifies that he/she has demonstrated the corresponding level of experience in addition to the ability to apply project management knowledge. The candidate has to have shown effective application of the competence elements in project situations with limited complexity. The candidate might need to be guided in the continuing development of his/her project management competence.
- **Project Management Associate (IPMA Level D):** Means that the person is able to apply project management knowledge when he participates in a project in any capacity and common knowledge is not sufficient to perform at a satisfactory level of competence. The candidate has shown his/her knowledge of the competence elements and the ability to apply it.

Specific competence criteria for the assessment are listed in the competence element descriptions. The levels represent defined steps along a continuum of increasing knowledge and experience, and in the change of roles and responsibilities.

2.5 The need for coherent national competence baselines

It is a fact that cultures in the Mediterranean area are quite diverse, although they may have common points in the way they handle their business. Amongst diversities, religions play a large role. Catholics, Orthodox, Muslims, Jews, and others, have different approaches towards financial and contractual issues. When dealing internationally with global companies, it is clear that the Anglo-Saxon approach, as developed by the British and the Americans, prevails over local Mediterranean approaches. However, when dealing locally or in the Mediterranean area, the situation can be completely different.

Accordingly, there is a need to adapt the IPMA Competence Baseline to the local context: language, values, culture, ways of handling business. This is the reason why national PM professional associations are required to set up their own National Competence Baseline (NCB), with the active cooperation of the major local stakeholders in the PM arena: governments, industry, PM personnel. It goes much further than the simple translation to a local language: it includes a real review of what is important for the success of projects in the area. These NCB become the

reference for assessing competences of PM personnel. This is already the case in countries on the northwestern shore of the Mediterranean Sea and in Egypt.

We find there is a lot of interest on the southern and eastern shores of the Mediterranean for such adapted Competence Baselines. But there is still a need for vigorous action in order to involve the relevant stakeholders. Drawing on the experience from more PM advanced countries, the creation of a local PM-dedicated professional association, grouping local professionals keen to advance the profession is a paramount.

However, this will not preclude the fact many PM professionals from countries on the southern and eastern shores of the Mediterranean may want to have their competences recognized not by a national certification body but by a European or American one (in a similar way to what happens for the Universities). They do believe that such "external" recognition has more value on the market for competences.

3. PM Competences assessment

Once the competence baseline has been defined and the various levels identified, the issue is to assess the competence demonstrated by PM personnel in a fair and efficient basis, so as to ensure quality and trust in the results. The assessment concerns the demonstrated competences of the person in previous roles on a project and not his/her ability to run efficiently a future project! However, one can think that there is more probability to succeed in the future if you have demonstrated that you understood what project management means, if you have proved that success in previous projects is largely due to your actions.

Key criteria for having a reliable competence assessment include:

- Several assessment tools (curriculum vitae, project list, references, written exams, reports, workshops, interviews) used in combination
- Assessment by at least 2 assessors, active certified project management professionals (one from the economic sector of the candidate, one from another sector), with involvement of the certification body's management (taking the overall responsibility), and, in case of doubt, additional judgements (response of reference persons, 360 degree evaluation). These assessors are specially trained on assessment techniques and certification schemes.
- Many well selected, different questions of several kinds, as well as independently evaluated answers to each question and calculated averages, for/from the written exams, workshops and interviews

- The obligation for both the candidates and the assessors to actively avoid conflicts of interest (assigning independent assessors to each candidate)
- The candidates presentation of evidence about their project, programme or portfolio management role and responsibility in real cases
- The taxonomy and assessments for all certification processes on an common scale with an automatic tuning between all IPMA levels
- A thorough quality management, a special scheme committee and an independent appeal system for the whole certification process
- The accreditation of the certification by the authorised national body (recommended) and periodic and systematic validation of the real certification documentation and processes through IPMA validators
- The limited time validity of the certificate, with recertification after 5 years, based on a review of PM practice during the period.

When starting a new certification body, the responsibility of designing a proper certification scheme relies on a local group of First Assessors (recognised by the local PM community) under the leadership of a Foreign First Assessor coming from an existing mature certification body.

This assessment process is sometimes adapted to the specific needs of a given organisation. In fact, according to the type of projects run by an organisation, the relative importance of the 46 identified elements of competence can differ (some elements could even be absent), and the content can vary (specific methodologies, concepts, vocabularies). In which case, the assessment can be based on an adapted competence baseline and the process can include only some of the steps described above. This, then, becomes an internal certification process.

Such competence assessment can help PM professionals in the Mediterranean area to demonstrate their abilities towards external clients. It can also give to financing organisations a stronger confidence in the management of the projects they finance.

4. PM Competences development

The 4 level scale of competences allows PM personnel to check own progress.

As a first step of the certification process, candidates are requested to make their own self-assessment: checking their own view of their competence level on all 46 competence elements, expressed both in terms of knowledge and of experience.

Through this effort, they will identify, on the basis of the ICB3 descriptions for the level they seek, what are their strengths and weaknesses.

The assessment in itself, made by both assessors, will show them what independent professionals have found as their strengths and weaknesses. In some cases, there is a specific debriefing between candidates and assessors to review these results.

From these elements, the professionals wishing to develop their PM competences will search for gaining additional knowledge, further experience. Their managers can also help in the process, as the organisations the candidates work in will find a keen interest in their development.

Participation to research activities, training seminars, networking opportunities, professional events, are all elements which can contribute to competence development.

5. References

- ICB3 (www.ipma.ch)
- ISO/IEC 17024 (2003)
- ISO/EN 45013 (1990)
- ISO 10006
- National Competence Baselines (more than 30)
- OPM3, PMCDF and PMBOK Guide (PMI)
- Coaching on result and behaviour (Pi-media)
- Prince2 project management methodology (OGC)
- P2M, Japanese standard

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