

Part 2 – Activities with PMI®

This paper is a slightly updated version of a Feature Interview published on line by PMWorld Today in October and November 2007.

Introduction

David Pells, Managing Editor of *PM World Today* conducted the following interview over several months in the fall of 2007. The questions and answers are divided into three parts: Part 1 *Probed Max's Background*; this Part 2 discusses his *Activities with the Project Management Institute*; and Part 3 will answer *Questions on Project Management Practice*.

In this Part 2, PMWT's questions cover:

- Project Management Institute
- PMI Canadian West Coast Chapter
- Service on the PMI Board of Directors
- Movers and Shakers on the PMI Board, and
- A "Sea Change" in PMI

Project Management Institute

PMWT: How and when did you get involved with the Project Management Institute?

Max: In late 1973 I joined a vertically integrated forest products company. "Vertically integrated" means that they sold their own products to themselves down through the manufacturing chain until the products finally came out at the end as retail consumer goods. That is, from raw logs cut from the woodlands, through the pulp and paper mills, to finished paper and on to final retail products like copy and printing paper, wall paper, paper cups, paper hand towels and the like. The company was planning on going on a project development binge in the heady days of 1974 and decided to install a project management group responsible for identifying and developing major upgrades and new production facilities.

So, these were exciting times, but the first job was to figure out how to do project management and develop some policies and procedures. We hired a project management consultant of the day to do this task, but in order for us to understand what he was talking about he recommended that several of us join the Project Management Institute ("PMI"). So, I joined PMI in 1974 only to discover that they, too, were still learning the business. So, I brought my previous construction experience to bear to help the whole show along.

In those days, a majority of the PMI membership was from the engineer, procure, and construct industries, although there was a healthy pharmaceutical group who generally kept aloof from the construction gang. But interestingly enough, I was probably one of the first to recognize the wider applicability of the techniques that we were identifying and their range of coverage in terms of knowledge areas. In short I could see the broader applicability to administration, finance and systems engineering projects, now more popularly referred to these days as "information technology".

And the rest, as they say, is history.

PMI Canadian West Coast Chapter

PMWT: Were you involved in the founding of the West Coast BC chapter of PMI? How did that come about?

Max: Actually, I was the founding chapter president of the West Coast BC Chapter of PMI that was launched in 1979. Following a very brief period of true independence, the name was changed to PMI Canadian West Coast Chapter. An excerpt from our first published Annual Report for the year 1983-84 reads as follows:

History of West Coast BC Chapter

It was at the October 1978 PMI Seminar-Symposium in Anaheim, California that a group of delegates from British Columbia first met to discuss the formation of a local chapter. Following this meeting R. Max Wideman obtained a list of PMI members in British Columbia and adjoining regions of the U.S. Additional names were canvassed from business associates and, in February and March 1979, a letter went out to 150 persons to solicit their interest in forming a British Columbia Chapter. There was a strong response to the mailing. On 29 May 1979, a first meeting was held with those persons who had offered to serve on a steering committee.

The steering committee met twice more through the summer. Its efforts culminated in a successful inaugural meeting on 12 September 1979 with 52 persons attending the meeting in the University of British Columbia Graduate Student Centre. The meeting approved the intention to form a Chapter and accepted the constitution and bylaws. A Board of Directors was elected from those who served on the steering committee. Max Wideman was selected to be president.

A formal application for a charter was submitted to the PMI Board of Directors on 28 September 1979. At the Board's meeting of 18 October 1979, in Atlanta, the charter was granted. The Chapter was given the name "West Coast B.C." to distinguish it from U.S. West Coast Groups.

The chapter has had an interesting, if checkered, history. For a short while, it was even independent of PMI. This was due to various differences of opinion and how the relationship was handled resulting in a strong feeling that there should be a national Canadian project management organization. However, subsequent Chapter Boards became uncomfortable with not being an accepted part of PMI and buckled down under PMI's control requirements.

Many strong leaders have been a part of the development of the chapter in its 28 years of existence, too many to mention by name for fear of missing those whom I might have overlooked. Suffice it to say that in helping to formulate the basis of the Chapter, it was always my intention to "move on" as soon as possible to give others a chance to continue paving the way to the future.

In doing so, the most satisfying experience for me has been to see how people have come forward and blossomed in their careers as a result of taking on the responsibilities of president and Board membership. I believe that this is because of the opportunity to fly ideas, having to convince peers of those ideas, and experiencing the stress of facing public audiences – all without fear of "messing up" and risking the wrath of an employer.

By the way, that excerpt I quoted above was not written by me!

Service on the PMI Board of Directors

PMWT: When did you serve on the PMI Board of Directors, and in what roles?

Max: I was first elected to the Project Management Institute's Board of Directors as VP member Services in 1983. At that time Dr. **John Adams** was researching the attributes of a professional organization and how that would require establishing a body of knowledge that distinguishes project management from general management. At the same time, Past PMI President and Chairman, (the late) **Matt Parry**, had just completed his Ethics, Standards and Accreditation study known as the "ESA" Report.

I remember well my attendance at the first Board meeting, immediately after the election, when these topics were discussed. With some temerity, I inquired if indeed the findings of the ESA report showed that the minimum requirements were in place to meet the minimum attributes being advocated by John. I was told that indeed that appeared to be the case. So I replied "Then what are we waiting for?"

This response evidently triggered a long train of events, from the sterling work done by Dr. **Lew Ireland** in developing the first database of Project Management Professional ("PMP") certification questions; to a landmark "invitation-only" workshop that I orchestrated at the 1984 PMI Seminar Symposium to expand and improve the Project Management Body of Knowledge that I tagged as "PMBOK"; to the massive project management consulting and related web services of today; – and, I might say, to PMI's present resounding financial success.

Around 1984-85, the PMI Board established a PMBOK Standards Board of which I was chairman. After much diligent work with a team of over 80 PMI members, a large team to manage in those days (especially before the days of Email!), a formal Project Management Body of Knowledge (PMBOK) document was approved by the PMI Board of Directors on March 28, 1987. It promulgated to be effective for certification and educational program reviews as of September 1, 1987.

In 1985 I received PMI's Distinguished Contribution Award for my work and Person of the Year Award in 1986. In 1987 I won the election for PMI President followed by a year as Chairman in 1988. Interestingly, 1987 was a year of decision for me: Should I opt to take up the role of chairman of the PMI Standards Committee in order to continue my influence over the shaping of the PMI PMBOK, or take my chances at fame and (hopefully) fortune by running for PMI President. I chose the latter. I will leave it to others to decide whether or not that was the right decision.

Movers and Shakers on the PMI Board

PMWT: How many members did PMI have when you were president? What were the big issues for PMI at that time? Who else served on the board with you?

Max: In 1982, the membership of PMI was just over 3,300. There followed a significant upsurge with the spread of local chapters where more people could get involved and could see the benefits of local networking. By the end of 1988 at the end of my term as chairman, the membership had almost doubled to 6,200. We were on a roll.

What were the pressing issues of the day? They were many and varied, in fact, too many to recount, but likely typical of any Board responsibility. But I think always highest on the agenda was how do we best move forward within our limits of financial, staff and volunteer resources. The age of intellectual property copyright protection and aggressive product sales pitches had not yet been born!

The question of when I served and who served with me is rather more difficult because they were many and varied over the years. The best I can offer is as follows: I was first elected to the PMI Board in 1983 as VP-Member Services. At that time **Regula Brunies** was Chairman, **Ken Hartley** was President, **John Murphy** was VP-Chapter Activities, **Wayne San Filippo** was VP-Functional Operations and **Harvey Levine** was Secretary. **David Morton** was past-Chairman, Dr. **John Adams** was the Educational Director, Dr. **Terry Kinnear** was PMQ Editor in Chief and **Bonnie McGarr** was our paid Executive Director.

I remained closely associated with the Board in one capacity or another until 1988 when I completed my term as Chairman. During that time many people came and went in various capacities, for example: (the late) **Brian Fletcher** as VP-Chapter Activities (1984), Dr. **Gordon Davies** as VP-Finance (1984) and **Terry Anderson**, VP-Functional Operations (1984). **John Rollins** became VP-Finance (1985) and (the late) **Doug Egan** took over from me as VP-Member Services (1985).

In 1986 there was a sea-change and North America was segregated into three Regions: **Rod Dawson** became VP-Region I (i.e. Canada), **Patrice Murphy** and **Jenny Strbiak** represented Regions II and III respectively. **Al Badger** came on board as VP-Technical Activities. In 1987, taking over from **Brian Fletcher**, I was elected President with automatic elevation to Chairman in 1988. **Bob Yourzak** joined the Board as VP-Public Relations and **Larry Woolshlager** took over VP-Region II (1987). In 1988 **Jim Blethen** joined the Board as VP-Technical Activities, and **Fred Baker** became VP-Administration. **Warren Allen** and **Frank Jenes** represented Regions I and III respectively.

I must say that all of these people put in long hours working for the Institute and made remarkable contributions. Not that all was sweetness and light, Board members typically held very strong views and were not well equipped in the art of consensus-building. Consequently, there were many times when I observed bitter exchanges. Now and again there might have been personal agendas at play for personal gain – but not often. We were concerned for the good of the members and PMI's financial viability.

A "Sea Change" in PMI

PMWT: Max, you've seen PMI change a lot since then. In your opinion, what are some of the most significant changes affecting PMI since you were president?

Max: The answer to this question probably trespasses into sensitive areas so it will be important to stick to facts rather than opinion. Certainly, since I was president, there has been a sea change in PMI and two forces have dominated that change. The first is obviously the growth in "IT-type" projects spurred on by the evolution and enormous success of the personal computer and its application to business processes. As businesses in all domains discover, the opportunities for process improvement in these rapidly advancing technologies, including of course the Internet, the number and complexity of these projects has ballooned.

What has changed in the project management arena as a result is that such projects are typically much

shorter than "traditional construction-type" projects. They generally involve less money per project, the products have a much shorter "shelf-life" so that products cycle through at much shorter intervals, and the number of stakeholders involved in the projects are typically larger in proportion to their size. But above all creation of the product requires intellectual effort (brain work) rather than muscle power (brawn work). All of this means dealing with two quite different types of people who respond to quite different styles of management. And because the PMI membership is now made up of a majority of "IT types" instead of "construction types" the focus of PMI member interest has shifted accordingly. And with it, I think it is fair to say that the PMI culture has also changed.

The second force is the shift in PMI organizational responsibility from the membership to the paid executive staff. As with all nascent organizations, PMI started out by being run entirely by volunteers. As the membership grew along with revenue, so did the need for bureaucracy and paid staff to handle it. Hiring professional association executives inevitably means introducing a struggle between the visions of a permanent executive and those of a regularly changing volunteer Board membership. Understandably, it is difficult for an Executive to establish some degree of stability without exercising a degree of control over the organization. The perennial question is how much?

I recall that this issue was hotly debated on the Board many times as we worked our way through several Executive Directors. There were those, like myself, who wanted to see PMI leadership maintained by volunteers of stature, while others wanted to see a dominant paid professional in charge, one who would lead a parade that others could (meekly?) follow. Eventually, the other side got their wish. It is true that today we have a very flourishing PMI organization and, if numbers and financial strength are the criteria, then highly successful. The problem is that, short of a palace revolt, once members lose control they have probably lost it forever.

The reason is simple. The executive staff is more or less a fixture. The ostensibly authoritative Board is constantly changing. It is easy to convince new Board members of their responsibility to maintain the status quo; after all, it is a prestigious position to be a PMI Board member, a position not to be taken lightly. However, if a Board member should be so audacious as to advocate radical change, the Executive only has to wait it out and the Board member inevitably completes his or her term, and leaves.

As advocated by the Association of Executives, it makes logical sense to persuade an association Board to be responsible for long term planning, while the paid executive is responsible for day-to-day running of the organization. That does not mean that the Board should not pay close attention to how the organization is being run, indeed it has a fiduciary duty to do so. But for the reasons just noted, it is easy for the Executive to keep Board members fully occupied with long-term "strategic" decisions and, perhaps by other means, to simply persuade anyone who wishes to change operational direction, to stop meddling and to "mind their own business".

The irony of this division of responsibility between long-term strategy and short-term operations is that few Board members will ever be around in a position of accountability to ever see the results of their policy efforts. It is a classic case of responsibility without accountability.

So what is the significance of all of this? In my humble view, it is a sea change in the management philosophy of the organization. In the early days of PMI we struggled to identify and establish project management content of high value and to make that knowledge publicly available to all. Today, the knowledge and experience of PMI members is collected and cloistered under copyright and purveyed at a price. The consequence is that those with serious intellectual ideas to contribute are reluctant to do so

for fear of being locked out from their own gainful efforts. The result is a degree of stagnation.

Hence, it seems to me at least, that quantity and proceeds trumpet quality and progress. Altogether, it is a sea change indeed.

Coming next

In Part 3 of this *Feature Interview*, Max will discuss such things as what he considers the most significant recent developments and needed skills, project management in the future, and advice to new project management entrants.

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