

Building Professionalism in Canada

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The Ontario Institute has reached an important milestone for the profession. Through the mechanism of a private member's bill in the Ontario legislature, management consulting has been recognized as a self-regulating profession, and the designation "CMC" is recognized as certifying the competence and professionalism of a management consultant. Of course, management consultants can practice in Ontario without a CMC; this is a certificate and not a license. Nonetheless, the Ontario legislature has established a precedent of major importance to the profession across Canada and throughout the world.

Across Canada, Institutes are building upon the Ontario example. Active programs have been mounted to accomplish equivalent legislation in most other provinces. We can with confidence look forward to the day, when provincial institutes will be recognized in law across Canada, as the regulating bodies for the management consulting profession.

National Examinations Developed

Prior to 1980, Ontario and Quebec cooperated by sharing the workload of developing annual examinations. In 1980, IMCC for the first time established a Standing Committee on Examinations with a view to upgrading the examination process, standardizing the examinations across

provinces and, from year to year, improving the rigor of the admission process. Since then, examinations and marking guides have been developed for the general examination and the specialty examinations through a national committee, and the examinations have been administered and marked by the provincial institutes.

This is a major undertaking. A review of the 1983 examination process indicated that it required about 4,000 hours of volunteer effort.

The 1984 committee instituted a number of improvements. The committee:

- Agreed, with the support of most of the individuals setting the examinations, to extend its term, to two years, improving continuity and holding out the possibility of significant improvements in the process of developing examinations.
- Shared the work of setting, reviewing, and marking examinations among all provincial institutes.
- Made a strenuous effort to improve the quality of marking guides for each examination.
- Reviewed its work and the results achieved by candidates in a first attempt to evaluate the examination process.
- Began development of a pool of mini-case studies that would supply material for subsequent examinations.
- Reviewed the examination processes and procedures of the Canadian Institute of Chartered

Accountants and called upon the advice of an expert in testing and evaluation.

The 1984 results show that the examination process is presenting a significant test of a candidate's knowledge of the management process, the consulting process, and the candidate's specialist area of practice. Overall, 189 candidates wrote examinations as candidates for the CMC. One hundred and two were successful—a pass rate of 54%. It appears that the general examination presents the greater challenge. About 75% of candidates passed the specialist examination. Only a handful who passed the general examination failed their specialist paper. Therefore, it appears that the general examination dominates the specialist examination in determining the candidates who will be awarded the CMC.

Professional Certification and Practices Committee

In 1981 we established an IMCC Education Committee. The mandate of this *ad hoc* committee was to examine the common body of knowledge, the pre-certification training offered by Institutes, and the processes of developing and administering the examination. An ambitious undertaking. The committee has moved through a careful examination of the evolution of management consulting in Canada, the approaches of other professions to training and certi-

fication, and the processes currently being used in Canada. In recognition of its broad mandate, the committee was re-named Professional Certification and Practice (PCP). Over the last four years the committee has made a number of important contributions, including:

- Establishing minimum pre-certification standards, clarifying the standards shown on applications for membership.
- Strengthening the role of those sponsoring candidates for the CMC.
- Improving the form and content of applications for membership.
- Elaborating the procedures for reviewing applications, including the possibility of discussions with sponsors, review of the assignments cited in the application, and personal interviews with candidates.
- Working toward establishment of a common body of knowledge. The Ontario Institute has mounted a major effort in this area. This work is being shared with other provinces and is providing a base from which IMCC committee can build.
- Developing guidelines for pre-certification training programs that will improve the professional competence of new consultants and better prepare them for the examinations.
- Suggesting post-certification training programs as part of the new education thrust by IMCC and the Institutes.

In the long term, the PCP Committee is investigating the possibility of eliminating the specialist examination. As noted above, the examination process is making heavy demands on volunteer time, the majority of which

is dedicated to the specialist examination! and it is not clear that the specialist examination is strengthening our screening process of candidates. Perhaps more important, designation of a limited number of specialist areas for examination may be imposing artificial limits on the scope of a candidate's consulting practice. This appears contrary to the tendency we have observed toward more narrowly defined practices for individuals and even for firms.

Other chapters in Canada have been conferring with IMCO officers and staff to discuss strategies to extend this kind of certification elsewhere. Groups in other countries who want advice can count on getting it by writing or telephoning:

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Thus, the specialist examinations may become dysfunctional in an Institute that seeks to represent management consultants and to reflect the evolution of the profession.

We plan to continue to strengthen the application process, the work of the Membership Committee in screening applicants, the role and place of the sponsor, and the training programs offered by

Institutes. Over the next few years we will evaluate the process to determine if we have improved the process sufficiently that the specialist examination will no longer be required for an adequate test of the suitability of candidates.

Putting a Floor under Membership Standards

As noted above, one of the underlying objectives for IMCC is reciprocity among provincial institutes. Since authority over admissions and standards ultimately lies with provincial institutes, the IMCC has worked hard over the past years first to get agreement among provincial institutes on the minimum standards to be applied for admissions and then to get agreement from all provincial institutes on reciprocity. In other words, on the basis of the minimum standards, a provincial institute will accept without scrutinizing a member or CMC transferring from another provincial institute.

As of our last IMCC Board meeting, it appears we finally have this in place. After lengthy and careful discussions of each institute's membership standards and of positions vis-a-vis other institutes, we have seen an exchange of formal offers of reciprocity among provincial institutes. Thus, a CMC can expect to transfer membership from one province to another without challenge.

IMCC/CAMC Liaison

The Canadian Association of Management Consultants (CAMC)

has a long history of support for professional organizations. The first provincial institute in Ontario was created largely in response to CAMC's recognition that there was need for a professional organization to complement its commercial and industry-oriented activities. Over the past several years, CAMC has supported the provincial institutes through a program of block grant funding.

With the parallel development of both the professional organizations and the industry association, the boundaries between the two became fuzzy. IMCC has cooperated with CAMC in a joint committee to examine the relationship between the two organizations.

In principle, it has been agreed that matters of a purely commercial nature should be referred to CAMC (for example, negotiation of industry-wide fee schedules with provincial governments). If CAMC was unwilling or unable to respond, the Institute would handle the matter. But in general, we expect that CAMC is more experienced in these matters and better equipped to provide a prompt response that reflects ex-

perience in other jurisdictions. Matters of a purely professional nature would automatically fall into professional organizations (for example, examinations to qualify candidates for the CMC, or ethics and discipline cases).

Of course, few issues are clearly professional or clearly commercial-most have both commercial and professional aspects. A prime example is awareness among current and potential clients of the CMC. Low levels of awareness impairs the Institute's performance of its professional responsibilities. The Institute's claim to police the activities of its members is largely meaningless, unless clients recognize the CMC designation, are aware of the existence of the Institute and of their access to the Institute's ethics and discipline review, when they encounter unsatisfactory conduct of a member. So, Institutes across Canada place high priority on increasing the awareness in the community of the CMC. CAMC funding support was requested for a national awareness campaign. On the other hand, awareness of the CMC may improve the competitive advantage of CMCs in the

marketplace. And since not all CMCs are members of CAMC firms, the CAMC Board could visualize a potential disadvantage to its member firms. This issue has been resolved by observing that Institutes are free to sponsor an awareness campaign. And CAMC has declined a request to provide financial support for the campaign.

It has been agreed that the two organizations will maintain close liaison by designating a member of the Board of each who will attend the meetings of the other. In this way, we hope to keep each organization informed of the activities of the other so that we can, at an early stage, agree on the handling of issues which otherwise might become contentious.

Ron Robinson is president of Abt Associates of Canada and a partner in the management consulting firm of Thorne Stevenson & Kellogg. Mr. Robinson is also president of the Canadian Evaluation Society. He holds a master's degree in Business Administration from York University and a bachelor's degree in Mathematics from the University of Western Ontario. In addition to his Institute activities, he is also vice-chairman of the Education Committee of the Metropolitan Toronto Board of Trade.