APM

Association for
Project Management
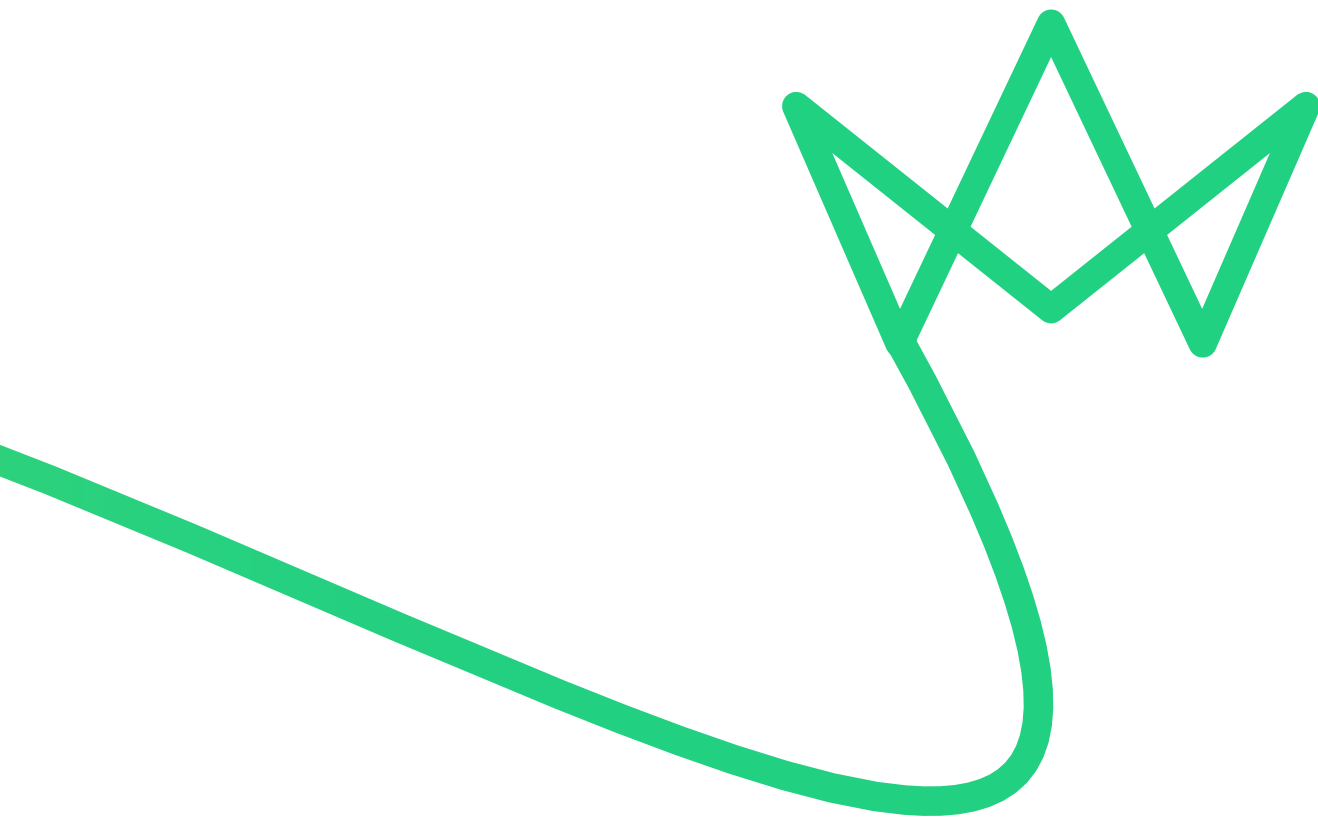
Chartered Project
Professional Guidance

Because when projects
succeed, society benefits

Introduction

This guidance will support your journey to achieving chartered status, providing information to understand and help prepare for an application, it may also highlight areas for future development.

This guide will help you:

• Understand what being chartered means for you and the profession.

• Decide if becoming chartered is right for you now, or at a later date.

• Prepare your application.

• Understand the process.

Who we are

The Association for Project Management (APM) is a professional membership organisation that sets the standards for the project profession and raises its profile. APM is the only chartered organisation representing the project profession in the world, we set the benchmark.

What is a Chartered Project Professional (ChPP)?

Chartered status shows you've achieved the highest standard of expertise and have proven your exceptional project capabilities, through a defined level of technical knowledge, professional practice and ethical behaviour. This forms the basis of the assessment that you must pass to gain Chartered Project Professional (ChPP) status, and the inclusion on the Register of Chartered Project Professionals.

The standard has been designed to be equally accessible to individuals both with or without PM qualifications (APM or others) but with significant relevant experience of projects, programmes or portfolios. It's drawn from the APM Competence Framework. It recognises the diverse paths individuals take into the profession, offering three routes to ChPP.

NOTE

Throughout the document wherever you see 'project management' should be taken to include the activities involved in not just projects, but also programmes and portfolios or key control or enabling functions such as PMO.

Why you should become chartered?

For APM and the profession it means	For you it means	For employers it means
• Enhanced status of project management. • Raised standards of practice. • Improved project outcomes. • Better public understanding and confidence in what we do. • Assurance and confidence for customers of project management services. • Opening the door to collaboration with other professions.	• Personal recognition from your peers in project management and other professions. • Enhanced CV to stand out in the job market. • A framework for the development of your career. • International recognition. • Assurance for clients of high standards and ethical practice. • Use of the post nominal ChPP after your name. • Increased understanding, helping you to work more effectively.	• Proof of a high standard of practice and ethical standards. • Attracting the best talent by actively supporting ChPP. • A competitive edge. • A ready-made framework for developing your people. • Motivated team committed to continuing professional development (CPD) and ethics. • Increased status of project management in organisations/ clients and the public.

Who is chartered for?

Project professionals that:

- Are professionally active with a proven track record of delivering projects, programmes, portfolios or a key control or enabling function that exhibit characteristics of complexity.

- Have the required breadth of project experience to meet the requirements of seven mandatory and five elective competences.

- Have an advanced technical knowledge and can confidently evaluate and analyse theory of current practices and methods.

- Are committed to continuing professional development and an ethical way of working.

Our Chartered Project Professionals span a range of sectors, ages and career stages, from organisations big and small.

- You do not need to be an APM member to apply.

- There is no minimum years' experience requirement.

- Project evidence can be historic, if the most recent evidence provided in your application is more than five years ago, you'll need to complete a currency statement to meet the requirement of being professionally active.

- We cannot confirm your suitability to apply, you should self-assess your readiness for chartership by reviewing the guidance and assessing your experience against the competences outlined in Appendix 1, 2 and 3.

Where to go for support?

This guidance outlines the requirements and process for the chartered standard; however, we've commissioned a range of support services that are available to APM members and non-members to assist you in your chartered journey.

ChPP Self-Assessment Tool

The tool helps you to assess and support your readiness to apply for chartered status.

The tool assists in identifying what evidence is most appropriate to use in your application, it also outlines areas of possible development needs if you are working towards achieving chartered status in the future. The tool can be accessed on https://www.apm.org.uk/chartered-standard

Support Clinics

We run a range of monthly support clinics to help you through your application to becoming a Chartered Project Professional.

- Understanding the chartered application process.
- Preparing your chartered application: your application.
- Preparing your chartered application: your interview.

These support clinics are available to all and are free to attend, for more information please visit apm.org.uk/chartered-standard/support-services/

There are other support services available from third parties, please note these haven't been endorsed by APM.

Resource: Competence Framework

The chartered standard is aligned to *APM Competence Framework 3rd edition*, do ensure you familiarise yourself with our framework, this is accessible to all on our website: apm.org.uk/resources/find-a-resource/competence-framework

Mentoring Programme (APM Member benefit)

The mentoring programme sees project professionals from across different industry sectors connect with fellow project practitioners from its community of members, with mentors sharing their invaluable experience and knowledge. The APM Mentoring Programme is housed within our community platform, in this secure online space, you will be able to connect with a mentor of your choice and work together to achieve your outlined goals for the programme.

APM Learning (APM Member benefit)

Members can access a dedicated APM Learning module designed to guide you through the application process and help you to prepare your submission for Chartered Project Professional.

Choosing your route

The application process is designed to be as inclusive as possible with different routes according to your qualifications, previous assessments and experience. The same requirements for technical knowledge and professional practice applies to everyone but they are tested in different ways.

There are three routes, and the online application process will help you through according to whether you have a recognised assessment and what it covers.

- Route 1: for those who have a recognised assessment for technical knowledge.

- Route 2: for those who have a recognised assessment for technical knowledge and professional practice.

- Route 3: an experiential route for those who don't have a recognised assessment but do meet the eligibility criteria.

Do you have a recognised assessment?

You can find the current list of recognised assessments on our website: https://www.apm.org.uk/chartered-standard/recognised-assessment/ You'll need to upload your certificate when you apply.

For all recognised assessments that have a validity date, the certificate needs to be current during the full assessment cycle that you are applying under.

If your recognised assessment is more than five years old, you'll need to provide a professionally active statement.

Can't see your assessment listed? Don't worry, you can still apply through the experiential route (Route 3) and provide evidence through the written submission and interview.

What is an APM Recognised Assessment (ChPP)?

A recognised assessment is one that has been reviewed and approved by APM, and meets the requirements of the chartered standard:

- Is at least at the required level for technical knowledge or technical knowledge and professional practice.

- Is externally regulated by an approved body (eg Ofqual, Office for Students), or aligns to the quality requirements of ISO17024.

- Covers a minimum number of mandatory and elective competences.

Find out more about our recognised assessment scheme on our website.

The application process

What is being assessed?

The application process is designed to assess the following areas, there's more detail later on in these guidance notes about the competences that support these areas.

You'll need to show:

- **Technical knowledge:** advanced technical knowledge and understanding of how to deliver projects, programmes or portfolios taking into account many interacting factors and different approaches that could be taken.

- **Professional practice:** successful application of this knowledge to deliver projects, programmes or portfolios that you were personally responsible/accountable for and that involved:
  - conflicting objectives
  - high levels of unpredictability or risk
  - multiple work packages, projects or programmes
  - multiple interdependent stakeholders

- You'll need to commit to professional ethics and show continuing professional development (CPD).

- You'll also need two proposers who support your application.

For the full details of competences that will be assessed, please see Appendix 1 and 2.

Reasonable adjustments

We'll work in partnership, with applicants who have either short or long term conditions, specific learning difficulties, neurodiversity, or are regarded as disabled as defined by the Equality Act 2010. We want our application to be accessible for all. We ask that all reasonable adjustment requests are evidenced by supporting documentation, such as a letter confirming workplace adjustments or documentation from your GP.

To discuss your requirements further, please contact the chartered team at chartered@apm.org.uk

Application process details

You'll go through a 2-stage process, the next section tells you how to provide the evidence required under each route.

Stage one Do you have a recognised assessment?		
Route 1	**Route 2**	**Route 3**
Yes, I have a recognised assessment for technical knowledge.	Yes, I have a recognised assessment for technical knowledge and professional practice.	No, I don't have a recognised assessment but I meet the eligibility criteria and have the necessary experience.
Assessment of technical knowledge is based on the recognised assessment that you hold. Assessment of professional practice is carried out by a written submission and interview.	Assessment of technical knowledge and professional practice is based on the recognised assessment that you hold.	Assessment of technical knowledge is done by an extended interview. Assessment of professional practice is carried out by a written submission and interview.
The next step is where you provide evidence of professional practice. There are three steps to this part: 1 Decide which competences you are going to provide evidence for. The full list and more information is later on in these notes. 2 Provide overviews of up to four projects, programmes or portfolios that you will use to illustrate them (maximum 500 words per project overview). 3 Write up to 250 words for each competence, referring back to the relevant project overview.		The next step is where you provide evidence of professional practice. There are three steps to this part: 1 Decide which competences you are going to provide evidence for. The full list and more information is later on in these notes. 2 Provide overviews of up to four projects, programmes or portfolios that you will use to illustrate them (maximum 500 words per project overview). 3 Write up to 250 words for each competence, referring back to the relevant project overview.
You'll be asked to declare that you've kept up to date through CPD, give your proposers' details and pay the application fee.	You'll be asked to upload your CPD log (for the last 12 months), your proposers' details and pay the application fee.	You'll be asked to declare that you have kept up to date through CPD, give your proposers' details and pay the application fee.
Your application will be assessed at this stage, and if successful you'll be invited to interview.		

Stage two Interview		
Route 1	**Route 2**	**Route 3**
• Up to one hour remote face-to-face interview (two assessors): • Professional practice to validate your written submission. • Ethics, compliance, and professionalism.	• An interview (one assessor) of up to 30 minutes: • CPD. • Ethics, compliance, and professionalism. • Currency of mandatory competences.	• Up to two hour remote face-to-face interview (two assessors): • Professional practice to validate your written submission. • Technical knowledge questioning to assess your breadth of knowledge. • Ethics, compliance, and professionalism.
A panel meets periodically to confirm results and award chartered status.		

Completing the form

Your application will be completed online, so get everything to hand before you start. Once you start the online application you can save it and come back so you don't need to do it all at once. There's also an 'export to PDF' option so you can pull off a copy for your records.

Checklist

☑ certificates from any recognised assessments

☑ two proposers: name and contact information only

☑ method of payment

If needed:

☑ project overviews

☑ evidence of competences

☑ your CPD log

If you're already registered on our website you'll need to log in to begin. If you're not already registered, it's quick and easy to do so. You'll be asked to provide some basic information to complete the registration process.

The form has help available as you go but if this doesn't answer your question, you can contact the chartered team at chartered@apm.org.uk

Personal information

You're asked to provide some basic personal information such as any professional memberships and the name of your employer (if applicable). We respect your information and will only use it in accordance with data protection rules and our privacy policy; this is available on request and via the online link when you register.

NOTE

If you need any reasonable adjustments, please contact the chartered team ahead of submitting your application. An offline version of the application is available on request to support accessibility.

Recognised assessments

Select the relevant recognised assessments from the drop-down list available. This will determine the next steps of the application process. You'll be directed automatically to the section you need to fill in next.

Be ready to upload any relevant certificates.

The current list of recognised assessments can be found on our website: www.apm.org.uk/chartered-standard/recognised-assessment.

If your recognised assessment is more than five years old, at the time of application, you'll need to provide a statement showing how you've kept up-to-date with current practice and methods and been actively involved in the project management profession.

You will need to evidence in your statement how you continue to meet the following requirements of remaining professionally active:

Route 1
- Having up-to-date knowledge of current practices and methods.

Route 2
- Having up-to-date knowledge of current practices and methods.
- Being actively involved in the project management profession.

Your professionally active statement can be up to 500 words.

If you have an assessment that covers both technical knowledge and professional practice, you can skip the next section and go straight to the section on continuing professional development.

Project experience

For those applying under Route 1 and Route 3, you'll need to provide project experience overviews of up to four projects, programmes or portfolios that give the contextual evidence for your professional practice assessment, the overviews should be regarded as setting the scene for your competence evidence. These overviews will be referred to as your project experience throughout your application.

You must only refer to one project per competence section, so it's important to describe a project that will give you the best chance of meeting the relevant assessment criteria within that competence section.

Each overview should evidence all the following requirements to be successful.

- You must show what you were personally responsible/accountable for within the project, programme or portfolio.

- The project, programme or portfolio must demonstrate all the following characteristics of a complex project:
  - conflicting objectives
  - high levels of unpredictability or risk
  - multiple work packages, projects or programmes
  - multiple interdependent stakeholders

You'll be expected to write up to 500 words for each project overview.

This section of the application is crucial to ensuring a successful submission through to stage 2, interview. Should the above requirements not be achieved then your project experience will be deemed as unsuccessful. An unsuccessful project overview means an unsuccessful submission. More information on scoring is provided in the scoring model later in the guidance.

Professionally active statement

In some instances, your project experience may be historic, if your most recent project, programme or portfolio is more than five years old at the time of applying, you'll need to provide a statement showing how you've kept-up-to date with current practice and methods and been actively involved in the project management profession.

You will need to evidence in your statement how you continue to meet the following requirements of remaining professionally active:

- Having up-to-date knowledge of current practices and methods.

- Being actively involved in the project management profession.

Your professionally active statement can be up to 500 words.

Competence selection and assessment

In this section you'll evidence how you meet the competences. You'll need to spend some time thinking about the evidence you'll need. The project management matrix tool can assist you in identifying the best evidence to use.

The mandatory options and elective selection provide the opportunity for those in specialist roles to demonstrate how they meet the chartered standard.

Mandatory	Seven competences Including two which are compulsory and five which have an or option
Elective	Your choice of five competences from a list of 16
Total	12 competences

Mandatory competences	Elective competences
Budgeting and cost control **OR** Financial management	Assurance
	Benefits management
Change control **OR** Conflict resolution	Business case
	Capability development
Governance arrangements **OR** Reviews	Contract management
	Diversity and inclusion
Integrated planning **OR** Schedule management	Life cycles
	Portfolio shaping
Leadership **OR** Team management	Procurement
	Quality management
Risk and issue management	Requirements management
	Resource capacity planning
Stakeholder engagement and communication management	Resource management
	Solutions development
	Sustainability
	Transition management

For each competence assessed, you'll need to cover a **minimum** of four professional practice assessment criteria across the competence. State which project, programme or portfolio overview the evidence is from. The competences and assessment criteria can be found in Appendix 1 of the guidance.

Each of your competence statements can be up to 250 words.

What you should do:

• Ensure you write your answers in the first person. "I did…."

• Avoid jargon and company acronyms – remember the assessors won't know your organisation so explain things as clearly as you can using plain language.

• Write up your project overviews and competence statements offline so that you can spell check, word count and edit them easily. Then simply copy and paste them into the application system. Double check you have pasted the text into the correct competence

• Proofread your application. It may help to go back to it the next day with a fresh pair of eyes before submitting.

Things to avoid:

• Avoid theoretical answers. Your professional practice statements are your opportunity to demonstrate the things that you have done.

• Avoid simply repeating or re-wording the assessment criteria as your response. You must add depth of evidence to demonstrate how you have achieved the criteria.

• Writing as 'we', this is your submission, we want to know what you have personally done not that of your team.

Remember: Each competence statement must relate to one project experience overview i.e. you can't refer to more than one project experience within a single competence. If an overview in your project experience section isn't referenced in your competence section, please remove before submitting your application.

Assessors will be looking for evidence of how you've attained and demonstrated the competence so you should use the first person, 'I', in your responses. All competences must be related to your own experience so avoid making statements about any team or corporate achievements which weren't your own, any restatement of the assessment criteria, or coverage of knowledge and theory.

TIP

When providing your evidence write in a flow rather than signposting to a specific competence criterion, this can enable you to meet multiple criteria within one statement.

NOTE

Professional practice means: being able to provide evidence of applying the technical knowledge (theory) to practice. You could think about this as experience.

Continuing Professional Development (CPD)

Your development as a project professional will continue throughout your career and you must make a commitment to keeping up to date as a Chartered Project Professional.

You'll need to have completed 35 hours of CPD in the 12 months up to your application and confirm that you'll maintain this every year. All CPD must meet the requirements of APM's CPD scheme which can be found on our website: apm.org.uk/cpd

You'll either be prompted to upload your record or self-declare (see section above on the application process).

You can use our CPD log template, but this isn't mandatory as long as you meet the necessary requirements detailed in our CPD scheme. Your submission must include a statement on the areas you'd like to develop further over the next 12 months.

Your proposers

You must provide contact details for two proposers who support your application. Proposers could be another project professional or your line manager but can't be a family member. Proposers do not need to be an APM member or hold ChPP status.

Your proposers should believe you're suitable for consideration for ChPP and be happy to confirm this if contacted by us.

Make sure your proposers are happy and know that they may be contacted.

Conflict of interest

Please let us know in the relevant section of your application form, or by contacting the chartered team, if you have had help or assistance in completing your application.

Code of Professional Conduct and online directory

In this section you'll be asked to confirm that you've read, understood and will abide by our Code of Professional Conduct: apm.org.uk/about-us/how-apm-is-run/apm-code-of-professional-conduct. This'll demonstrate your commitment to the profession and ethical behaviour, and your willingness to support others.

You'll also be asked if, subject to your application being successful, you'd like your name to be published in the online directory.

TIP

Things you might want to consider could include: work-based learning; distance learning; special work projects, writing technical papers; mentoring; voluntary work; association activities or committee work; promoting project management to young people; seminar/conference presentations; any relevant course or private study.

What happens next?

Once you have submitted your application:

- An initial review will be carried out by our chartered team regarding the completion of the application. If we identify any administrative issues, we'll contact you to request action. (This is not a review of the content.)
- Your written submission will be allocated to a chartered assessor.
- You'll receive the outcome of the assessment decision within 35 working days.

If you're successful, you'll receive a confirmation email inviting you to book an interview under stage 2.

If your application is not successful, we'll write to you and explain the reason for the decision. You'll be given feedback and guidance to help you re-submit.

The interview

If your first stage application is successful, you'll be invited to an interview.

The interview is a mandatory part of the assessment process for all applicants. It's based on the information you provide in your application and will validate and explore your responses.

All routes include a mandatory assessment of ethics, compliance and professionalism. The interviewers will ask you to define ethical behaviour and up to two questions relating to your competence against the criteria defined in Appendix 3.

Interviews may be recorded or observed for quality assurance purposes with the applicant's permission.

The interviewers will make their judgements based solely on the information in your application and your performance during the interview.

Interviewers are experienced assessors and understand the requirements and criteria for ChPP. You'll each be told one another's names in advance of the interview to identify and prevent any conflicts of interest. They won't necessarily be matched to your market sector or area of expertise but will give a very brief introduction of themselves for your benefit before the interview.

Route 1 interviews

Your interview will be conducted virtually by two assessors, the purpose is to explore and validate your written submission. You're expected to provide detailed and specific answers about actual events relating to evidence in your application. You will be asked:

- Clarification questions on your project overviews (if applicable).

- Clarification questions on your professionally active statement (if applicable).

- Questions on six competence areas from your written submission in relation to professional practice, four competence criteria will be addressed per competence. Competences to validate are chosen by the assessors.

- Questions on ethics, compliance, and professionalism.

If you have any additional evidence you'd like to add to support your application you will be given up to five minutes to provide this. This is your time to utilise should you wish to go back and add value to a particular area.

NOTE

Professional practice means: being able to provide evidence of applying the technical knowledge (theory) to practice. You could think about this as experience.

NOTE

Technical knowledge means: an advanced technical knowledge and understanding of how to deliver projects, programmes and portfolios. You could think about this as the theory.

NOTE

You must sit the interview within a year of receiving your successful written submission results.

TIP

Keep a copy of your application for your records and review before the interview stage. There is an 'export to PDF' link on each page of the online application form.

NOTE

Additional documentation won't be accepted to support your evidence.

TIP

A copy of your written submission and brief notes are permitted during the interview. These are to be used as a memory-aid and shouldn't be read from verbatim.

Route 2 interviews

Your interview will be conducted virtually by one assessor, the purpose of the interview is to explore currency, ethics and CPD. You'll be asked:

- Clarification questions on your professionally active statement (if applicable).
- Clarification questions on your CPD submission (if applicable).
- Questions on how the CPD you've undertaken relates to a selection of mandatory competences and/or examples, within the past five years, where you've used a selection of mandatory competences within your project management related activity.
- Questions on ethics, compliance, and professionalism.

If you have any additional evidence you'd like to add to support your application you will be given up to five minutes to provide this. This is your time to utilise should you wish to go back and add value to a particular area.

Route 3 interviews

Your interview will be conducted virtually by two assessors, the purpose of the interview is to explore and validate your professional practice within your written submission as well as assess your advanced technical knowledge.

You're expected to provide detailed and specific answers about actual events relating to evidence in your application with regards to professional practice.

The technical knowledge questions are designed to assess your breadth of knowledge against the criteria (available in Appendix 2). Answers to these questions don't specifically have to relate to your own experience.

You'll be asked:

- Clarification questions on your project overviews (if applicable).
- Clarification questions on your professionally active statement (if applicable).
- Questions on six competence areas from your written submission in relation to professional practice, four competence criteria will be addressed per competence. (Note: Competences to validate are chosen by the assessors).
- Questions on four competence areas identified from your written submission which will relate to technical knowledge, a minimum of four competence criteria will be addressed per competence. (Note: Competences to validate are chosen by the assessors).
- Questions on ethics, compliance, and professionalism.

If you have any additional evidence you'd like to add to support your application you will be given up to five minutes to provide this. This is your time to utilise should you wish to go back and add value to a particular area.

Please be aware that you can be questioned on any of the 12 competence areas both from the point of view of professional practice and of technical knowledge.

You can find the technical knowledge assessment criteria in Appendix 2. Please ensure you prepare yourself against all 12 competences for providing evidence against technical knowledge at interview. The required score for successfully meeting the technical knowledge requirement is provided in the scoring model.

NOTE

You must sit the interview within a year of receiving your successful written submission results.

TIP

Keep a copy of your application for your records and review before the interview stage. There is an 'export to PDF' link on each page of the online application form.

TIP

A copy of your written submission and brief notes are permitted during the interview. These are to be used as a memory-aid and shouldn't be read from verbatim.

What happens next?

Your assessors will make a recommendation which will then be referred to a panel for approval. You'll then be informed of the outcome.

If you're successful, you'll receive a letter and a certificate from us confirming your achievement within eight weeks from the results release date aligned to your assessment cycle.
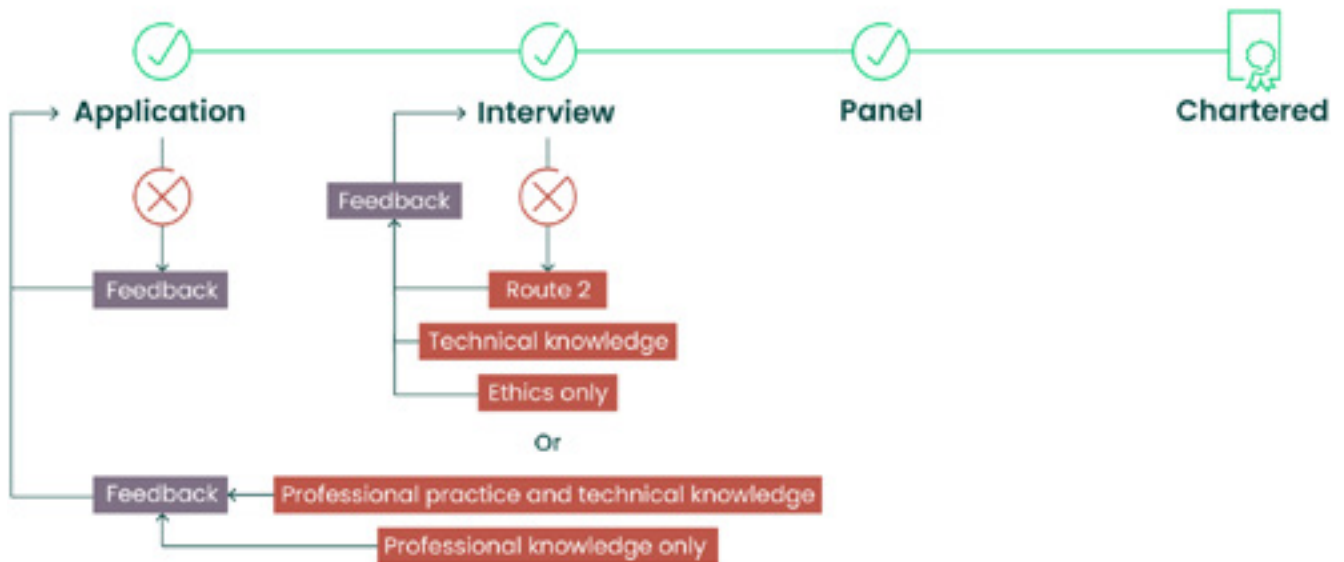
APM will also provide you with a digital badge in recognition of your achievement and you be entitled to use ChPP as a post-nominal.

Your name will be included on the Register of Chartered Project Professionals.

Your name will be published on our website if you've given permission for us to do so.

If unsuccessful at interview, we'll write to you and explain the reason for the decision. You'll be given feedback and guidance to help you repeat the required process. If unsuccessful at interview against the professional practice criteria then you will have to start the application process again, including your written submission.

ChPP applicant process overview

Scoring model

Each chartered competence is marked out of two with:

- 0 = less than two assessment criteria provisionally achieved across the chartered competence
- 1 = two to three assessment criteria provisionally achieved across the chartered competence
- 2 = at least four of the assessment criteria provisionally achieved across the chartered competence

		Route 1	Route 2 No scores provided must successfully meet the criteria at interview	Route 3
Stage 1: Written submission	**Project overview**	• Demonstrated your personal responsibility and accountability • Met criteria of fulfilling the four characteristics • If unsuccessful the competence which the project relates to will score a **0** • If more than one project is referred to within a competence, the relevant competence will score a **0**	N/A	• Demonstrated your personal responsibility and accountability • Met criteria of fulfilling the four characteristics • If unsuccessful the competence which the project relates to will score a **0** • If more than one project is referred to within a competence, the relevant competence will score a **0**
	Competence	• Professional practice score a minimum of **20** • Mustn't score a **0** against any competence areas	N/A	Professional practice score a minimum of **20** Mustn't score a **0** against any competence areas
Stage 2: Interview		• Professional practice: Score **22 or more** across the six competences assessed at interview and the six remaining competence scores taken from your written submission • Ethics, compliance, and professionalism: successfully meet the criteria • Mustn't score a **0** against any competence area	• Professionally active (where applicable) • CPD • Currency • Ethics, compliance, and professionalism	• Professional practice: score **22 or more** across the six competences assessed at interview and the six remaining competence scores taken from your written submission • Technical Knowledge: score **7 or more**, you must achieve a score of at least two against three of the four technical knowledge competences assessed. • Ethics, compliance, and professionalism: successfully meet the criteria • Mustn't score a **0** against any competence area

Maintaining your Chartered Status

To maintain your chartered status, you're obliged to complete 35 hours of continuing professional development (CPD) annually, which we may audit at any time and are required to pay an annual renewal fee.

Should you lapse your status you have a two month grace period to re-activate before being required to fulfil the chartered process again.

Register and directory

We maintain a register containing details of all those who hold the Chartered Project Professional designation. This will be managed by us for the purposes of meeting the requirements of the Royal Charter and this will not be publicly available. Those on the register also have the option to have their names on a public directory. You can opt in or out of having your name displayed on the directory.

What to do if you are not happy with your outcome

We've a 3-stage procedure for those wishing to raise a results enquiry/appeal. The stage chosen is dependent on the grounds in which you'd like to progress. You have a right to submit a results enquiry/appeal without fear of reprisal or victimisation and should expect APM to deal with an appeal seriously, impartially and in confidence.

By attending the interview candidates confirm they're fit to do so: no appeals will be heard concerning a candidate's wellbeing during the interview.

An enquiry/appeal must be received no later than **30 days** after the dispatch of your results. Stage 1, 2 & 3 of the process will incur a fee which is refundable should your enquiry/appeal be upheld.

For further information visit apm.org.uk/apm-complaints-process/assessment-results-enquiry-process/

We would like you to take the time to reflect on the information provided within the feedback, should you wish to contact APM regarding the outcome we expect all applicants regardless of the situation, to treat and communicate with our staff in a polite, respectful and reasonable manner.

Confidentiality

We anticipate that you're able to supply the necessary level of detail required without breaching any confidentiality.

Data protection

We take data protection seriously and you can rest assured we will handle your personal data compliantly. We will only share your data with our carefully selected pool of approved assessors and members of Chartered Panel, who are contractually bound to meet the requirements of the applicable Data Protection Laws.

The information you submit in your application will only be used for the purpose of this application. In accordance with our retention policy, we will delete any unfinished applications if it has not been accessed for 6 months. We will remind you prior to this and offer our support if needed.

If you want to know more or if you have any questions about how we handle your data, please visit our Privacy Statement on our website or contact our Data Protection Officer on dataprotection@apm.org.uk

Appendix 1:

Professional practice assessment criteria for written submission

In this document, the term 'project' is used to mean project, programme, portfolio or a key control function.

NOTE

If you are currently answering the written submission on professional practice these are the assessment criteria.

NOTE

Where **and** is underlined, you must provide evidence for all aspects of the competence criteria.

TIP

Reference APM Competence Framework 3rd edition to assist with your understanding.

Chartered competence 1a – Budgeting and cost control

The ability to develop and agree budgets for projects and understanding where costs fall over time.

Introduction

Budgeting and cost control comprises the estimation of costs, the setting of an agreed budget and management of actual and forecasted costs against the budget.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Established estimates for different project costs.
PP1.2 Established <u>and</u> gained agreement to a project budget.
PP1.3 Set up funding drawdown arrangements based on cash flow forecasts.
PP1.4 Applied metrics to establish cost trends within a project.
PP1.5 Refined budget allocations based on cost analysis, applying change control processes as required.
PP1.6 Produced financial reports for stakeholders based on financial performance monitoring.
PP1.7 Upon project closure, produced final financial reports and distributed them to relevant stakeholders.

Chartered competence 1b – Financial management

The ability to enable financial resource for delivery and to plan and control the finances of projects, as part of the organisation's overall financial management, to ensure optimisation of the business case.

Introduction

Financial management considers the affordability of the proposal within the timeframe and ensures that the money required is secured and made available when needed and is subsequently managed. It provides an interface between the financial management arrangements for a project and the financial systems of the organisation.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Established capital <u>and</u> revenue expenditure for a project whilst ensuring alignment with the organisation's financial plan.
PP1.2 Adopted a consistent approach to the investment appraisal of a project in line with organisational practice.
PP1.3 Established control limits for the reporting <u>and</u> approval of budget variances.
PP1.4 Arranged for the release of funds at appropriate stages in a project.
PP1.5 Established financial reporting milestones <u>and</u> reviews for a project.
PP1.6 Ensured a consistent approach to estimating is used across a project.
PP1.7 Produced financial progress reports based on the financial information related to a project.
PP1.8 Adjusted an organisation's financial plan based on the progress of a project and associated financial reviews

Chartered competence 2a – Change control

The ability to manage variations and change requests in a controlled way.

Introduction

Change control is the process through which all requests to alter the baseline scope of projects are identified, evaluated, and then approved, rejected, or deferred.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Established a suitable change control process.
PP1.2   Implemented <u>and</u> maintained a suitable change control process.
PP1.3   Captured <u>and</u> recorded proposed changes to the agreed project scope.
PP1.4   Determined the high-level impact of proposed changes to the project scope including reference to relevant sources.
PP1.5   Determined the detailed impact on time <u>and</u> cost estimates of options relating to a proposed change.
PP1.6   Reached justified recommendations on the approval, rejection, or deferral of proposed changes to a project <u>and</u> updated stakeholders as necessary.
PP1.7   Updated plans <u>and</u> schedules reflecting the approved changes to a project demonstrating configuration management.
PP1.8   Used trend analysis to help determine the performance of the current and future projects.

Chartered competence 2b – Conflict resolution

The ability to identify, address and resolve differences between individuals and/or interest groups.

Introduction

Conflict resolution is the process of identifying and addressing differences that, if unmanaged, would affect the delivery of projects and the culture of the workplace. Effective conflict resolution exploits healthy conflict to support group development and learning and addresses negative conflict to prevent differences from becoming harmful elements in a project.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Taken a proactive approach to identifying <u>and</u> addressing potential conflict situations which may have impacted on the project.
PP1.2   Taken an impartial approach to investigating the cause of conflict.
PP1.3   Evaluated <u>and</u> implemented conflict resolution measures, seeking assistance from others when necessary.
PP1.4   Responded appropriately and promptly to conflict situations where intervention was required.
PP1.5   Monitored the extent to which conflict resolution measures have been successful.
PP1.6   Sought to resolve conflict respecting the views, opinions, and concerns of all parties.
PP1.7   Supported others to resolve conflict.

Chartered competence 3a – Governance arrangements

The ability to establish and maintain governance structures that define control of deployment for delivery of projects, and that align with organisational practice.

Introduction

Governance arrangements comprise the framework of authority and accountability that defines and controls the outputs, outcomes and benefits from projects. They are the mechanism whereby the investing organisation exerts financial and technical control over the deployment of the work and the realisation of value.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Defined reporting, decision-making hierarchies, <u>and</u> levels of authority for a project.
PP1.2   Established the relationship between a project's governance <u>and</u> the organisation's governance structures.
PP1.3   Designed the project governance structure taking into account context, complexity, and potential impact.
PP1.4   Adapted or adjusted the governance structure as required
PP1.5   Ensured clarity of ownership <u>and</u> levels of authority by agreeing the responsibilities and accountabilities with relevant individuals.
PP1.6   Ensured effective decision making through maintained governance structures.
PP1.7   Ensured effective reporting through maintained governance structures for appropriate staffing and maintenance.

Chartered competence 3b – Reviews

The ability to manage progression through the life cycle of a project.

Introduction

Reviews are a way of gathering information to provide an assessment of the status of a project, the ongoing viability of it and determining areas for attention or approval. work, and to supply advice and guidance.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Considered factors which need to be evaluated during a review.
PP1.2   Established <u>and</u> implemented a schedule of reviews incorporating key milestones.
PP1.3   Obtained appropriate information from valid sources to inform the reviews.
PP1.4   Maintained records of any deviations from plans to include reasons for <u>and</u> responses to, the deviations.
PP1.5   Communicated the outcomes of reviews to relevant stakeholders.
PP1.6   Confirmed stakeholder understanding <u>and</u> acceptance of proposed actions.
PP1.7   Implemented agreed actions <u>and</u> updated lessons learned.
PP1.8   Conducted and documented a close out review.

Chartered competence 4a – Integrated planning

The ability to take forward the definition of outputs into detailed planning, incorporating multiple areas into the integrated project management plan.

Introduction

Integrated planning involves collating a suite of plans and processes to support a project to create an integrated plan (commonly referred to as the project management plan). Its size, structure and content may vary according to the complexity of the project. The intention is that it captures the fundamental components of scope, quality, time, cost, resources, risks and issues, communication, success and completion criteria and benefits management.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Considered constraints and assumptions when creating an integrated plan.
PP1.2 Considered dependencies and governance arrangements, when creating an integrated plan.
PP1.3 Demonstrated compliance with organisational practice when establishing the size, structure, and contents of an integrated plan.
PP1.4 Included other relevant components, plans and documentation to support a comprehensive integrated plan, and ensured formal acceptance of it.
PP1.5 Completed formal sign off and acceptance of an integrated plan.
PP1.6 Continually monitored the progress of a project against the integrated plan.
PP1.7 Adjusted the integrated plan utilising a change control process
PP1.8 Applied configuration management to a plan once it had been formally accepted.

Chartered competence 4b – Schedule management

The ability to undertake time-based planning with an emphasis on activities and resource.

Introduction

Schedule management is the process of developing and maintaining schedules that show when work for a specific project is planned to be performed. It considers any dependencies and can be for internal and/or external resources and activities.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Defined tools <u>and</u> techniques for creating <u>and</u> updating a schedule.
PP1.2 Established units of measure to accurately define activities <u>and</u> events to be completed during a project.
PP1.3 Developed duration estimates <u>and</u> critical dates for each activity and event.
PP1.4 Determined relationships <u>and</u> dependencies between activities and events, when constructing a schedule.
PP1.5 Documented a schedule of phases, milestones, <u>and</u> reviews to support project monitoring and progress reporting.
PP1.6 Agreed a schedule baseline, exceptions, and tolerance thresholds.
PP1.7 Communicated regular schedule updates to internal or external stakeholders.
PP1.8 Refined a schedule of activities based on effective monitoring, implementing the change control process when required.

Chartered competence 5a - Leadership

The ability to empower and inspire others to deliver successful projects by providing vision, direction, feedback, and support, so that people can do their best work.

Introduction

Leadership is essential to the successful management of projects. It requires clear communication of vision, values, and objectives. Leadership styles need to be adapted to create a supportive working environment that builds trust, through coaching and mentoring that is engaging and empowering for the individual.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Maintained a team's understanding of, and commitment to the vision, values, and objectives of a project
PP1.2 Selected an appropriate leadership style based on the situation and/or context.
PP1.3 Collaborated with others to maintain the momentum of a project.
PP1.4 Encouraged others to adopt behaviours which built trust, confidence, and collaboration either within or between teams.
PP1.5 Established environments which presented opportunities for empowered and autonomous working.
PP1.6 Established leadership approaches to work with remote teams, colleagues and stakeholders.
PP1.7 Identified and addressed difficulties and challenges through facilitating open discussions in a timely manner.

Chartered competence 5b – Team management

The ability to select, develop and manage individuals to create and sustain teams.

Introduction

Team management entails bringing people together and motivating, co-ordinating and developing them to achieve specified objectives that cannot be realised individually. It involves encouraging team members, internal and external, to work in collaboration towards achieving a common goal. The success of any project is dependent on effective team management.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Agreed team objectives <u>and</u> ways of working to achieve the vision and goals of a project.
PP1.2   Evaluated the maturity level of the team.
PP1.3   Adopted a proactive approach to communication to establish networks of support <u>and</u> facilitate effective ownership of delegated tasks.
PP1.4   Built a relationship of trust <u>and</u> support, taking into consideration the possible complexities of collaboration, virtual working, time zones and cultures.
PP1.5   Met the demands of a project through balancing individual <u>and</u> team needs.
PP1.6   Provided opportunities for coaching <u>and/or</u> mentoring to members of a team, creating an environment of learning and trust thus promoting continual professional development.
PP1.7   Addressed performance issues likely to negatively impact on the success of a project whilst remaining alert to any signs of stress within the team.
PP1.8   Acknowledged levels of performance through constructive feedback to individuals and teams and celebrated success when evident.
PP1.9   Established a learning culture <u>and</u> promoted continued professional development.

Chartered competence 6 – Risk and issue management

The ability to identify and monitor risks (threats and opportunities) and issues; to plan and implement responses to those risks and respond to issues that affect a project.

Introduction

Risk management is the proactive process to identify, assess and respond appropriately to risks. Examples of risk management includes discerning which threats to actively minimise, and opportunities to maximise or pursue.

Issue management is about having the flexibility to react to issues in ethical and appropriate ways, including escalation to the appropriate authority.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Continually identified risks within a project.
PP1.2 Created a risk register including potential impact <u>and</u> suitable responses.
PP1.3 Assessed the probabilities <u>and</u> impacts of risks <u>and</u> planned their responses.
PP1.4 Capture <u>and</u> recorded issues, how they were resolved, and their implications to inform planning for future projects.
PP1.5 Reacted, assessed, <u>and</u> planned responses to issues.
PP1.6 Implemented responses to risks <u>and</u> issues including escalation, recording lessons learned.
PP1.7 Transferred and/or formally closed unresolved risks at the end of a project or phase.

Chartered competence 7 – Stakeholder engagement and communication management

The ability to work with people, both internally and externally, to build support to achieve intended outcomes.

Introduction

Stakeholder engagement is understanding who needs to be engaged and influenced and ensuring ongoing commitment. Communication management ensures the exchange of relevant and timely information to support the successful delivery of a project and inform decision making.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Determined stakeholder interests, <u>and</u> levels of influence for a project.
PP1.2   Produced a communication plan <u>and</u> undertaken effective stakeholder engagement based upon it.
PP1.3   Monitored effectiveness of the communication plans <u>and</u> stakeholder engagement activities.
PP1.4   Adjusted the communication plan <u>and</u> responded to any changing stakeholder engagement needs.
PP1.5   Employed relevant communication methods <u>and</u> media to meet stakeholder requirements and expectations.
PP1.6   Disseminated clear, timely <u>and</u> relevant information to stakeholders.
PP1.7   Obtained, <u>and</u> responded to, feedback from stakeholders which may have an impact on a project.

Professional practice assessment criteria for written submission

Chartered competences

Elective

In this document, the term 'project' is used to mean project, programme, portfolio or a key control function.

NOTE

If you are currently answering the written submission on professional practice these are the assessment criteria.

NOTE

Where **and** is underlined, you must provide evidence for all aspects of the competence criteria.

TIP

Reference APM Competence Framework 3rd edition for consideration prompts for each competence to assist with your understanding.

Chartered competence 8 – Assurance

The ability to provide confidence to the governance board that a project is on track to deliver the objectives and intended value.

Introduction

Assurance is objective and independent, working in partnership with governance and risk management.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Agreed the scope and responsibilities for assurance activities.
PP1.2 Resourced assurance activities.
PP1.3 Conducted assurance activities making recommendations for corrective action where required.
PP1.4 Prioritised assurance activities.
PP1.5 Provided advice, guidance, and support in the implementation of recommendations.
PP1.6 Maintained effective communication with stakeholders to address concerns and report on corrective actions.
PP1.7 Analysed patterns of change to identify trends to improve current or future project performance.

Chartered competence 9 – Benefits management

The ability to identify and agree the benefits and determine how they will be measured, monitored, and managed throughout a project until they are realised.

Introduction

Benefits management actively documents, measures, and monitors a project to assure realisation. It aligns with the business case and intended outcomes for delivery.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Demonstrated how the intended benefits relate to strategic objectives <u>and</u> are measurable to stakeholders.
PP1.2 Created a benefits management strategy which considers priorities, timescales and responsibilities, and monitoring methods.
PP1.3 Confirmed dependencies between intended benefits <u>and</u> the outputs, outcomes, and related business changes.
PP1.4 Created a benefits realisation plan which considers funding options, key indicators, milestones, and reporting schedules.
PP1.5 Prioritised benefits based on their level of contribution to strategic objectives.
PP1.6 Carried out effective monitoring against the benefits realisation plan.
PP1.7 Responded to the changing project context by adjusting actions to maximise benefits realisation.

Chartered competence 10 – Business case

The ability to prepare, gain approval of, refine and update business cases that justify the initiation, investment and/or continuation of projects in terms of benefits, costs, and risks.

Introduction

Business cases provide the justification for undertaking and continuing with a project. The business case needs to be reconsidered at regular review points during a project in case the original justifications are affected by later developments.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Supported a persuasive argument for a business case through the effective analysis of relevant factors.
PP1.2   Determined the relevant factors which could influence the development of a business case.
PP1.3   Documented a business case in a relevant format.
PP1.4   Established a benefits framework for a business case.
PP1.5   Gained initial <u>and</u> ongoing formal acceptance of a business case.
PP1.6   Implemented a change control process <u>and</u> configuration management system when updating a business case.
PP1.7   Monitored <u>and</u> refined a business case as circumstances and factors demanded.

Chartered competence 11 - Capability development

The ability to assess organisational maturity in relation to a project and the wider organisation.

Introduction

Capability development addresses the continuous improvement of competences within an organisation, investing in people and knowledge, and improving the predictability of delivering results and creating the correct context for teams to perform.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Conducted a skills analysis for individuals within an organisation to identify gaps in competences required to deliver a project.
PP1.2 Used tools <u>and</u> techniques to determine an organisation's capability to support skills development.
PP1.3 Created or adapted a training <u>and</u> development strategy in relation to project management.
PP1.4 Implemented a training and development strategy in relation to project management.
PP1.5 Developed or adapted competency models to an organisation's workforce in relation to project management.
PP1.6 Monitored <u>and</u> evaluated organisational learning against the capability development objectives.
PP1.7 Adapted the strategy <u>and</u> model to the needs of a changing environment.
PP1.8 Embedded an on-going learning culture in the organisation.

Chartered competence 12 – Contract management

The ability to monitor and manage supplier performance.

Introduction

Contract management is a proactive activity tailored to the size, complexity, and significance of a project. Appropriate contract management will facilitate a proactive working environment and include a process to review progress, incorporating formalised reporting from contract initiation through to contract closure.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Monitored client performance against their agreed contractual obligations.
PP1.2 Complied with your organisational procedures associated with contract management.
PP1.3 Monitored the supplier performance against their agreed contractual obligations.
PP1.4 Managed supplier relationships.
PP1.5 Took appropriate action where necessary to ensure all parties comply with the terms of a contract.
PP1.6 Managed contract variances to address any potential contractual items.
PP1.7 Closed a contract and reported outcomes to stakeholders.

Chartered competence 13 – Diversity and inclusion

The ability to build and maintain an inclusive environment that embraces a diverse culture.

Introduction

Diversity and inclusion need to be considered as workplace environments are increasingly made up of individuals with different backgrounds, needs, abilities and ways of working. There is an opportunity within projects to proactively address the institutionalised inequalities that may exist, by being aware and treating people fairly.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Proactively researched different aspects of diversity <u>and</u> how these can impact individuals at work.
PP1.2 Actively identified and engaged with diverse skill sets <u>and</u> individual traits that constitute a team.
PP1.3 Recognised the potential effects of personal bias <u>and</u> cultural norms that may be influential on perspective and judgement.
PP1.4 Created <u>and</u> sustained a positive, inclusive working environment and identified opportunities for inclusion.
PP1.5 Maximised the opportunities presented by a diverse team <u>and</u> led them to a common purpose.
PP1.6 Established a cohesive culture that supported both organisational governance <u>and</u> appropriate values and behaviours.
PP1.7 Actively explored and responded to signs of bias that could impact individual and/or team cohesion and performance.

Chartered competence 14 – Life cycles

The ability to structure and organise projects.

Introduction

A life cycle is a framework comprising a series of distinct stages required to transform an idea or concept into reality in an orderly and efficient manner. A life cycle can be viewed as the structure underpinning deployment. Recognised life cycles include: linear (commonly referred to as waterfall), iterative (commonly referred to as agile) and hybrid. The choice of life cycle depends on the desired outputs, outcomes, benefits, and the expected uncertainty, novelty, and risk appetite for a project.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Identified the underlying principles of a life cycle for management of projects within the organisation.
PP1.2 Analysed potential life cycles available for the management of a project.
PP1.3 Investigated the impact of internal or external factors which influenced adoption of an alternate life cycle approach to the organisation's established practice.
PP1.4 Adapted or refined an existing life cycle approach to reflect size, complexity and significance of a project.
PP1.5 Utilised existing or developed sources of information to inform the processes, standards and guidelines required to implement the life cycle.
PP1.6 Reflected on the strengths and limitations of a life cycle making refinements as required based on experience.

Chartered competence 15 – Portfolio shaping

The ability to set up portfolios to ensure efficient delivery of strategic objectives.

Introduction

Portfolio shaping is the grouping of projects at an organisational or functional level to select, prioritise and control deployment in line with strategic objectives and the capacity to deliver, balancing projects and business-as-usual, while optimising return on investment.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Determined changes required by the organisation's strategic objectives.
PP1.2   Categorised a range of related projects which address an organisation's strategic objectives using a mapping of intended outputs, outcomes, and benefits.
PP1.3   Determined gaps which may exist in the alignment of projects and programmes, either current or proposed to strategic objectives.
PP1.4   Established measures to compare the likely value of a portfolio to an organisation's strategic objectives.
PP1.5   Applied measures to prioritise current and proposed projects and programmes, considering the availability of finance and other resources when applying those measures.
PP1.6   Recommended where projects are initiated, maintained, or closed to maintain a balanced portfolio.
PP1.7   Communicated to stakeholder's recommendations to inform decisions about the maintenance of a balanced portfolio.

Chartered competence 16 – Procurement

The ability to secure the provision of resources, choosing strategies for obtaining best value from supply chains.

Introduction

Procurement is the process for securing the goods and services that are required from external suppliers to satisfy project needs as appropriate.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Developed detailed specifications for the procurement of resources for a project.
PP1.2   Agreed a procurement strategy with relevant stakeholders.
PP1.3   Established the type, quality, <u>and</u> quantity of the resource requirement.
PP1.4   Evaluated technical <u>and</u> commercial options for fulfilling the requirements.
PP1.5   Agreed contracts and statements of work in line with organisational requirements.
PP1.6   Negotiated <u>and</u> secured resources to effectively deliver a project.
PP1.7   Complied with organisational procedures when selecting and negotiating with suppliers.

Chartered competence 17 - Quality management

The ability to ensure that outputs are delivered in accordance with requirements.

Introduction

Quality management ensures that the outputs from the defined scope and the processes through which they are delivered are meeting stakeholder requirements and are fit for purpose.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Established agreed quality criteria for the processes <u>and</u> outputs of the project with reference to the business case and project plans.
PP1.2   Created or adapted a quality management plan involving stakeholders <u>and</u> reflecting the organisation's processes, culture, and values.
PP1.3   Managed quality assurance in accordance with the Quality Management Plan.
PP1.4   Managed quality control in accordance with the Quality Management Plan.
PP1.5   Managed outcomes from the quality management process, implementing the change control process where required.
PP1.6   Captured lessons learned during a project to contribute to continuous improvement.

Chartered competence 18 – Requirements management

The ability to prepare and maintain definitions of the requirements of projects.

Introduction

Requirements management is the process of capturing, assessing, and justifying stakeholders' wants and needs to satisfy an identified need. Comprehensive and measurable requirements are critical to the success of a project.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Conducted an analysis of stakeholder wants <u>and</u> needs to inform a schedule of requirements.
PP1.2 Confirmed the outcomes of research through internal and/or external experts.
PP1.3 Prioritised stakeholder wants, <u>and</u> needs based on research.
PP1.4 Determined the dependencies <u>and</u> constraints which influenced the delivery of the requirements.
PP1.5 Documented the requirements agreed within the schedule of requirements.
PP1.6 Finalised a schedule of requirements based on negotiation with stakeholders.
PP1.7 Adjusted and approved a schedule of requirements during a project.

Chartered competence 19 – Resource capacity planning

The ability to plan resource needs in line with the strategic direction of the organisation to ensure that resource utilisation is maintained at an appropriate level for optimal efficiency.

Introduction

Resource capacity planning looks at the strategic direction of the organisation, to create a forecast of the skills, capabilities and resources required to deliver future needs. This activity is typically delivered by a programme and/or portfolio manager.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Established resource requirements for a project.
PP1.2 Included consideration of other projects when planning the allocation of resources.
PP1.3 Assessed the total resource capacity for the duration of the project.
PP1.4 Capitalised on opportunities for sharing infrastructure and/or procurement efficiencies.
PP1.5 Governed the direction of project activities through effective scheduling of phases, milestones, and review points
PP1.6 Established reporting requirements for resource utilisation.
PP1.7 Prepared and delivered progress reports to relevant stakeholders.

Chartered competence 20 – Resource management

The ability to acquire and deploy internal and external resources.

Introduction

Resource management is the process of identifying and scheduling the resources required to implement a project, while acknowledging the need to use scarce resources in an optimal way.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Determined major resource drivers or constraints within a project.
PP1.2   Established resource requirements for all activities <u>and</u> events within a project.
PP1.3   Determined internal resources which are available to support the delivery of a project considering their availability.
PP1.4   Determined external resources which are available to support the delivery of a project considering their availability.
PP1.5   Prepared a schedule for resource use, reconciling resource limits <u>and</u> time constraints.
PP1.6   Monitored resource use against a schedule during a project <u>and</u> identify variances that require action.
PP1.7   Refined a resource schedule using a change control process.

Chartered competence 21 – Solutions development

The ability to determine the optimal solution to satisfy agreed requirements.

Introduction

Solutions development is the process of ensuring that there is clarity on the problem to be solved, and then of exploring multiple options until a preferred solution is identified and subsequently maintained and refined.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Used tools <u>and</u> techniques to identify options to satisfy project requirements.
PP1.2   Used tools <u>and</u> techniques to evaluate and select options develop solutions.
PP1.3   Documented options and agreed a preferred solution aligned with project governance.
PP1.4   Communicated the rationale for agreed solutions to stakeholders.
PP1.5   Implemented a monitoring process <u>and</u> refined solutions as required.
PP1.6   Implemented a change control process to manage solution refinement.
PP1.7   Utilised a configuration management process for refinement of solutions.

Chartered competence 22 - Sustainability

The ability to balance the environmental, social, economic, and administrative considerations that will impact a project.

Introduction

Sustainability involves taking individual and organisational responsibility to ensure outputs, outcomes and benefits are sustainable over their life cycles, meeting the current needs of stakeholders without compromising or over burdening future generations. In addition, change initiatives need to be delivered through sustainable working practices and methods. Sustainability is so significant and important, that projects need to proactively alter behaviours and apply methods that ensure these considerations become second nature.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1   Promoted <u>and</u> adhered to sustainable working practices that support organisational standards.
PP1.2   Determined the sustainability vision <u>and</u> objectives for a project and assessed ways to achieve them.
PP1.3   Established stakeholder perception <u>and</u> actively managed sustainability expectations and outcomes.
PP1.4   Employed techniques to embed a culture of sustainability within a project <u>and</u> applied a range of communication styles to promote sustainability objectives.
PP1.5   Monitored sustainability measures being undertaken, ensuring stakeholders remain informed and supportive.
PP1.6   Promoted the sharing of lessons learned <u>and</u> encouraged sustainability and accountability at all levels.
PP1.7   Monitored emergent sustainability initiatives <u>and</u> promoted efficiencies to facilitate sustainability in a project or organisation.

Chartered competence 23 - Transition management

The ability to manage the integration of the outputs of a project into business-as-usual (BAU), ensuring that outputs enable delivery of the intended value.

Introduction

Transition management is multi-faceted, its purpose being to facilitate changed capability, bedding in new processes, practices, and tools and techniques. It includes organisational change management and directing benefits realisation management.

Professional practice assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you have:
PP1.1 Determined key staff required to support a transition process.
PP1.2 Established the logistics requirements to support a transition process.
PP1.3 Determined the knowledge transfer requirements for a transition process.
PP1.4 Created a plan including transition priorities, ownership, <u>and</u> potential for disruption.
PP1.5 Negotiated with stakeholders to gain agreement on the transition process.
PP1.6 Negotiated agreement on staffing solutions, logistics and knowledge transfer requirements
PP1.7 Established a benefit review process to monitor benefits realisation which meets the requirements of relevant stakeholders.

Appendix 2:

Technical knowledge assessment criteria for interview (if required)

In this document, the term 'project' is used to mean project, programme, portfolio or a key control function.

NOTE

If you are currently preparing for your route three interview including technical knowledge these are the assessment criteria.

NOTE

Where **and** is underlined, you must provide evidence for all aspects of the competence criteria.

TIP

Reference APM competence Framework 3rd edition for consideration prompts for each competence to assist with your understanding.

Chartered competence 1a – Budgeting and cost control

The ability to develop and agree budgets for projects and understanding where costs fall over time.

Introduction

Budgeting and cost control comprises the estimation of costs, the setting of an agreed budget and management of actual and forecasted costs against the budget.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show you can:
TK1.1 Critically analyse the different types of estimates and costs incurred within a typical project
TK1.2 Critically evaluate what needs to be considered when establishing a budget.
TK1.3 Critically evaluate the importance of establishing a baseline for reporting upon and refining a budget.
TK1.4 Critically analyse how funding can be allocated throughout a typical project.
TK1.5 Critically evaluate different monitoring and reporting techniques in relation to financial performance.
TK1.6 Critically analyse the need to close all project finances.

Chartered competence 1b – Financial management

The ability to enable financial resource for delivery and to plan and control the finances of projects, as part of the organisation's overall financial management, to ensure optimisation of the business case.

Introduction

Financial management considers the affordability of the proposal within the timeframe and ensures that the money required is secured and made available when needed and is subsequently managed. It provides an interface between the financial management arrangements for a project and the financial systems of the organisation.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate the governance rules for investment appraisal.
TK1.2   Critically analyse ways in which organisations might release project funding.
TK1.3   Critically evaluate the characteristics of a consistent approach to estimating.
TK1.4   Critically evaluate the range of metrics which can determine the value of a project to an organisation.
TK1.5   Critically analyse the information expected to be available for financial reviews.
TK1.6   Critically evaluate tools and techniques available to monitor <u>and</u> analyse the financial performance of a project.

Chartered competence 2a – Change control
The ability to manage variations and change requests in a controlled way.

Introduction

Change control is the process through which all requests to alter the baseline scope of projects are identified, evaluated, and then approved, rejected, or deferred.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate the importance of the inclusion of a change control process within a project governance structure.
TK1.2   Critically analyse ways of capturing <u>and</u> recording change requests.
TK 1.3 Critically evaluate techniques to determine the high-level impact of a proposed change.
TK1.4   Critically evaluate ways to justify whether a change should be approved, rejected, or deferred.
TK1.5   Critically analyse the purpose of communicating the outcomes of evaluated changes.
TK1.6   Critically analyse the steps to applying an approved change.
TK1.7   Critically analyse patterns of change to inform trend analysis.

Chartered competence 2b – Conflict resolution

The ability to identify, address and resolve differences between individuals and/or interest groups.

Introduction

Conflict resolution is the process of identifying and addressing differences that, if unmanaged, would affect the delivery of projects and the culture of the workplace. Effective conflict resolution exploits healthy conflict to support group development and learning and addresses negative conflict to prevent differences from becoming harmful elements in a project.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically analyse different ways to identify conflict.
TK1.2 Critically analyse a variety of different indicators of conflict.
TK1.3 Critically evaluate the ways conflict resolution models can be used.
TK1.4 Critically analyse the various sources available to help resolve conflict.
TK1.5 Critically evaluate indicators that may help to confirm the success of conflict resolution measures.
TK1.6 Critically evaluate the techniques that are available to facilitate conflict resolution.

Chartered competence 3a – Governance arrangements

The ability to establish and maintain governance structures that define control of deployment for delivery of projects, and that align with organisational practice.

Introduction

Governance arrangements comprise the framework of authority and accountability that defines and controls the outputs, outcomes and benefits from projects. They are the mechanism whereby the investing organisation exerts financial and technical control over the deployment of the work and the realisation of value.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically analyse the types of processes that could be put in place to effectively govern a project.
TK1.2 Critically evaluate the interrelationships between project governance <u>and</u> organisational governance.
TK1.3 Critically analyse the effect of organisational culture <u>and</u> working practices on a project's governance structure.
TK1.4 Critically analyse the various levels of ownership within organisational governance and project governance structures.
TK1.5 Critically analyse ways to help maintain confidence in the governance structure.

Chartered competence 3b – Reviews

The ability to manage progression through the life cycle of a project.

Introduction

Reviews are a way of gathering information to provide an assessment of the status of a project, the ongoing viability of it and determining areas for attention or approval. work, and to supply advice and guidance.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically analyse factors that need to be evaluated when establishing a schedule of project reviews.
TK1.2   Critically evaluate how to obtain relevant sources of data to inform reviews.
TK1.3   Critically evaluate the purpose of aligning reviews with governance processes.
TK1.4   Critically evaluate ways of reporting and responding to project deviations.
TK1.5   Critically analyse how stakeholders can be involved in the review outcomes.
TK1.6   Critically evaluate actions necessary for the re-planning of a project in the event of deviations.
TK1.7   Critically evaluate why planned reviews might need to be changed.
TK1.8   Critically evaluate how reviews might impact the business case and the wider organisation.

Chartered competence 4a – Integrated planning

The ability to take forward the definition of outputs into detailed planning, incorporating multiple areas into the integrated project management plan.

Introduction

Integrated planning involves collating a suite of plans and processes to support a project to create an integrated plan (commonly referred to as the project management plan). Its size, structure and content may vary according to the complexity of the project. The intention is that it captures the fundamental components of scope, quality, time, cost, resources, risks and issues, communication, success and completion criteria and benefits management.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1　Critically evaluate the choices to be made when choosing the size, structure, and content of an integrated plan.
TK1.2　Critically evaluate the purpose and importance of an integrated plan.
TK 1.3　Critically analyse the typical components of an integrated plan.
TK1.4　Critically evaluate techniques to monitor an integrated plan.
TK1.5　Critically evaluate the different elements used when updating an integrated plan.

Chartered competence 4b – Schedule management

The ability to undertake time-based planning with an emphasis on activities and resource.

Introduction

Schedule management is the process of developing and maintaining schedules that show when work for a specific project is planned to be performed. It considers any dependencies and can be for internal and/or external resources and activities.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically analyse key planning considerations when creating a schedule.
TK1.2   Critically evaluate the impact of internal <u>and</u> external schedule dependencies on a project.
TK1.3   Critically evaluate project planning techniques.
TK1.4   Critically evaluate schedule estimating techniques.
TK1.5   Critically evaluate the need for an approved baseline schedule.
TK1.6   Critically analyse the ways to update the schedule.
TK1.7   Critically evaluate the impact of changes on an approved baseline schedule.

Chartered competence 5a – Leadership

The ability to empower and inspire others to deliver successful projects by providing vision, direction, feedback, and support, so that people can do their best work.

Introduction

Leadership is essential to the successful management of projects. It requires clear communication of vision, values, and objectives. Leadership styles need to be adapted to create a supportive working environment that builds trust, through coaching and mentoring that is engaging and empowering for the individual.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically evaluate different leadership styles.
TK1.2 Critically analyse the behaviours <u>and</u> interpersonal skills that underpin effective leadership.
TK1.3 Critically evaluate how, understanding a project environment affects the leadership style.
TK1.4 Critically analyse the structure and content of a project vision and its importance.
TK1.5 Critically evaluate methods for addressing challenges within a project environment.

Chartered competence 5b - Team management

The ability to select, develop and manage individuals to create and sustain teams.

Introduction

Team management entails bringing people together and motivating, co-ordinating and developing them to achieve specified objectives that cannot be realised individually. It involves encouraging team members, internal and external, to work in collaboration towards achieving a common goal. The success of any project is dependent on effective team management.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically analyse the value of setting a project vision and how the maturity of a team can affect its delivery.
TK1.2 Critically analyse the importance of effective communication to facilitate ownership of delegated tasks.
TK1.3 Critically evaluate the challenges that may occur when working with remote teams.
TK1.4 Critically evaluate the way in which individuals and team needs correlate.
TK1.5 Critically evaluate ways of developing and supporting individuals and/or teams.
TK1.6 Critically analyse techniques for performance monitoring and how these are affected by changes in team dynamics.

Chartered competence 6 – Risk and issue management

The ability to identify and monitor risks (threats and opportunities) and issues; to plan and implement responses to those risks and respond to issues that affect a project.

Introduction

Risk management is the proactive process to identify, assess and respond appropriately to risks. Examples of risk management includes discerning which threats to actively minimise, and opportunities to maximise or pursue.

Issue management is about having the flexibility to react to issues in ethical and appropriate ways, including escalation to the appropriate authority.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically analyse ways to identify risks and capture issues.
TK1.2 Critically evaluate techniques to assess risk.
TK1.3 Critically analyse the types of impact risks and issues could have on project delivery.
TK1.4 Critically evaluate techniques to improve issue management through continuous improvement.
TK1.5 Critically evaluate the need for ongoing ownership of risks.

Chartered competence 7 – Stakeholder engagement and communication Management

The ability to work with people, both internally and externally, to build support to achieve intended outcomes.

Introduction

Stakeholder engagement is understanding who needs to be engaged and influenced and ensuring ongoing commitment. Communication management ensures the exchange of relevant and timely information to support the successful delivery of a project and inform decision making.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate the importance of Stakeholder Engagement.
TK1.2   Critically evaluate the ways to identify and analyse stakeholder interests and level of influence.
TK1.3   Critically analyse the content of a typical communication plan.
TK1.4   Critically evaluate ways of monitoring the impact of stakeholder engagement.
TK1.5   Critically evaluate the range of methods <u>and</u> media available for project communications.
TK1.6   Critically evaluate how stakeholders can provide feedback.

Technical knowledge assessment criteria for interview (if required)

Chartered competences

Elective

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In this document, the term 'project' is used to mean project, programme, portfolio or a key control function.

NOTE

If you are currently preparing for your route three interview including technical knowledge these are the assessment criteria.

NOTE

Where **and** is underlined, you must provide evidence for all aspects of the competence criteria.

TIP

Reference APM Competence Framework 3rd edition for consideration prompts for each competence to assist with your understanding.

Chartered competence 8 – Assurance

The ability to provide confidence to the governance board that a project is on track to deliver the objectives and intended value.

Introduction

Assurance is objective and independent, working in partnership with governance and risk management.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically analyse the scope, priorities, <u>and</u> strategic aims of assurance activities.
TK1.2   Critically evaluate the range of assurance approaches and strategies.
TK1.3   Critically analyse risks that could affect assurance activities.
TK1.4   Critically evaluate ways to develop and engage ownership of the recommendations for corrective actions.
TK1.5   Critically analyse sources for advice, guidance <u>and</u> support that may be required in the implementation of improvement recommendations.
TK1.6   Critically analyse techniques for recognising trends that influence current and future projects.

Chartered competence 9 – Benefits management

The ability to identify and agree the benefits and determine how they will be measured, monitored, and managed throughout a project until they are realised.

Introduction

Benefits management actively documents, measures, and monitors a project to assure realisation. It aligns with the business case and intended outcomes for delivery.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically analyse techniques used to align potential benefits with an organisation's strategy.
TK1.2 Critically evaluate techniques to identify, assess <u>and</u> measure intended benefits of a project.
TK1.3 Critically evaluate an appropriate approach to create a benefits management strategy.
TK1.4 Critically analyse the use and importance of a benefits realisation plan.
TK1.5 Critically evaluate ways to evidence the strategic benefits delivered by projects.
TK1.6 Critically analyse the need for managing expectations of the anticipated benefits of projects.
TK1.7 Critically evaluate the importance of monitoring the benefits plan throughout the project.

Chartered competence 10 – Business case

The ability to prepare, gain approval of, refine and update business cases that justify the initiation, investment and/or continuation of projects in terms of benefits, costs, and risks.

Introduction

Business cases provide the justification for undertaking and continuing with a project. The business case needs to be reconsidered at regular review points during a project in case the original justifications are affected by later developments.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1　Critically evaluate relevant internal organisational factors which can influence the creation of a business case.
TK1.2　Critically evaluate relevant external factors which can influence the creation of a business case.
TK1.3　Critically evaluate the different ways to analyse relevant factors affecting business cases.
TK1.4　Critically analyse the process of creating a benefits framework.
TK1.5　Critically analyse the manner in which a business case may be adapted to remain relevant during changing environments.

Chartered competence 11 – Capability development
The ability to assess organisational maturity in relation to a project and the wider organisation.

Introduction

Capability development addresses the continuous improvement of competences within an organisation, investing in people and knowledge, and improving the predictability of delivering results and creating the correct context for teams to perform.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate the ways to conduct a skills analysis.
TK1.2   Critically analyse the components of a training and development strategy.
TK1.3   Critically evaluate the ways in which to understand the current level of an organisations project capability maturity.
TK1.4   Critically analyse the tools <u>and</u> techniques to determine an organisation's ability to uplift its capability.
TK1.5   Critically evaluate the options for developing an ongoing people development plan.

Chartered competence 12 - Contract management

The ability to monitor and manage supplier performance.

Introduction

Contract management is a proactive activity tailored to the size, complexity, and significance of a project. Appropriate contract management will facilitate a proactive working environment and include a process to review progress, incorporating formalised reporting from contract initiation through to contract closure.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically evaluate the influence of governance on contract management.
TK1.2 Critically evaluate the need for shared understanding of delivery obligations.
TK1.3 Critically evaluate the impact of size, complexity and significance of a project on managing contract performance.
TK1.4 Critically evaluate the importance of understanding the respective obligations of all parties <u>and</u> approaches to managing contractual changes.
TK1.5 Critically analyse the process <u>and</u> elements to close a contract.
TK1.6 Critically evaluate the purpose and approaches of controlled changes to contracts.
TK1.7 Critically evaluate the importance of contract management to an organisation.

Chartered competence 13 – Diversity and inclusion

The ability to build and maintain an inclusive environment that embraces a diverse culture.

Introduction

Diversity and inclusion need to be considered as workplace environments are increasingly made up of individuals with different backgrounds, needs, abilities and ways of working. There is an opportunity within projects to proactively address the institutionalised inequalities that may exist, by being aware and treating people fairly.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate the importance of recognising the value of 'difference'.
TK1.2   Critically evaluate ways to recognise individual, team or organisational bias.
TK1.3   Critically analyse diversity and inclusion factors that can create a positive working environment.
TK1.4   Critically analyse enabling factors which reflect the value of difference.
TK1.5   Critically evaluate the importance of the organisational culture at all levels in creating an inclusive workplace.
TK1.6   Critically analyse ways that support fair treatment of individuals.
TK1.7   Critically evaluate the role of training and education in supporting diversity and inclusion.

Chartered competence 14 – Life cycles

The ability to structure and organise projects.

Introduction

A life cycle is a framework comprising a series of distinct stages required to transform an idea or concept into reality in an orderly and efficient manner. A life cycle can be viewed as the structure underpinning deployment. Recognised life cycles include: linear (commonly referred to as waterfall), iterative (commonly referred to as agile) and hybrid. The choice of life cycle depends on the desired outputs, outcomes, benefits, and the expected uncertainty, novelty, and risk appetite for a project.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically evaluate the life cycle options available.
TK1.2 Critically analyse how an organisation's culture, structure <u>and</u> mindset can influence its approach to life cycle choices.
TK1.3 Critically analyse how to assess an organisation's capability for delivering different life cycle options.
TK1.4 Critically evaluate the sources available to define the processes, standards, and / or guidelines, in the choice of life cycles.
TK1.5 Critically evaluate the importance of reflecting upon the strengths and limitations of a life cycle <u>and</u> making refinements as required.
TK1.6 Critically evaluate the challenges of introducing a new life cycle framework to an organisation.

Chartered competence 15 – Portfolio shaping

The ability to set up portfolios to ensure efficient delivery of strategic objectives.

Introduction

Portfolio shaping is the grouping of projects at an organisational or functional level to select, prioritise and control deployment in line with strategic objectives and the capacity to deliver, balancing projects and business-as-usual, while optimising return on investment.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate ways that projects and programmes can be categorised to shape a portfolio.
TK1.2   Critically analyse techniques to determine gaps which may exist in the alignment of projects and programmes in a portfolio to the organisation's strategic objectives.
TK1.3   Critically evaluate measures that could be used to compare the value of, both current and proposed, projects and programmes to an organisation's strategic objectives.
TK1.4   Critically evaluate methods to prioritise current and proposed projects and programmes.
TK1.5   Critically evaluate the importance of the various aspects of communication within the management of a portfolio.
TK1.6   Critically evaluate the need for ongoing assessment of the projects and programmes progression and viability.

Chartered competence 16 – Procurement

The ability to secure the provision of resources, choosing strategies for obtaining best value from supply chains.

Introduction

Procurement is the process for securing the goods and services that are required from external suppliers to satisfy project needs as appropriate.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate the purpose of establishing procurement processes in a project.
TK1.2   Critically analyse information that needs to be captured in a procurement specification.
TK1.3   Critically evaluate technical and commercial options that can form the basis of a procurement approach.
TK1.4   Critically evaluate the internal capacity <u>and</u> capability required to support a procurement process for a project.
TK1.5   Critically evaluate ways in which procurement negotiations can be conducted.
TK1.6   Critically analyse controls for managing a contract.
TK1.7   Critically evaluate the benefits of procurement through framework agreements instead of single, sole, or multiple suppliers.

Chartered competence 17 - Quality management

The ability to ensure that outputs are delivered in accordance with requirements.

Introduction

Quality management ensures that the outputs from the defined scope and the processes through which they are delivered are meeting stakeholder requirements and are fit for purpose.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically analyse the characteristics of quality criteria.
TK1.2 Critically evaluate the contents of a quality management plan.
TK1.3 Critically evaluate quality assurance processes.
TK1.4 Critically evaluate a range of quality control techniques.
TK1.5 Critically evaluate techniques to develop continuous improvement.
TK1.6 Critically evaluate the need to engage stakeholders in Quality Management.
TK1.7 Critically evaluate the purpose of quality management.

Chartered competence 18 – Requirements management

The ability to prepare and maintain definitions of the requirements of projects.

Introduction

Requirements management is the process of capturing, assessing, and justifying stakeholders' wants and needs to satisfy an identified need. Comprehensive and measurable requirements are critical to the success of a project.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate ways to identify <u>and</u> analyse stakeholders' requirements.
TK1.2   Critically evaluate techniques to prioritise stakeholder requirements.
TK1.3   Critically analyse the correlation of requirements with the business and other projects.
TK1.4   Critically analyse techniques to verify data.
TK1.5   Critically evaluate ways to confirm the value of the requirements to the organisation's strategy.

Chartered competence 19 – Resource capacity planning

The ability to plan resource needs in line with the strategic direction of the organisation to ensure that resource utilisation is maintained at an appropriate level for optimal efficiency.

Introduction

Resource capacity planning looks at the strategic direction of the organisation, to create a forecast of the skills, capabilities and resources required to deliver future needs. This activity is typically delivered by a programme and/or portfolio manager.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically analyse how to establish resource requirements.
TK1.2 Critically evaluate the impact of organisational priorities on the management of resources.
TK1.3 Critically analyse the tools <u>and</u> techniques available for the scheduling and balancing of resources.
TK1.4 Critically evaluate the need for resource optimisation.
TK1.5 Critically evaluate the principles for resource optimisation.
TK1.6 Critically evaluate appropriate ways to report progress aligned to governance guidelines <u>and</u> constraints.

Chartered competence 20 – Resource management

The ability to acquire and deploy internal and external resources.

Introduction

Resource management is the process of identifying and scheduling the resources required to implement a project, while acknowledging the need to use scarce resources in an optimal way.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically analyse influencing factors in resource management.
TK1.2   Critically analyse ways of determining the available resource, giving consideration to their capacity.
TK1.3   Critically evaluate tools and/or techniques to schedule resource.
TK1.4   Critically evaluate techniques used to manage resources.
TK1.5   Critically evaluate ways to update a resource schedule.
TK1.6   Critically evaluate the purpose of revisiting resource management during a project.
TK1.7   Critically evaluate close out activities for resource management.

Chartered competence 21 – Solutions development

The ability to determine the optimal solution to satisfy agreed requirements.

Introduction

Solutions development is the process of ensuring that there is clarity on the problem to be solved, and then of exploring multiple options until a preferred solution is identified and subsequently maintained and refined.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1   Critically evaluate a range of tools <u>and</u> techniques potentially used to identify options to deliver a project.
TK1.2   Critically analyse tools <u>and</u> techniques to evaluate and validate options to deliver a project.
TK1.3   Critically analyse a range of governance controls that could be significant in the documentation and decision making of arriving at a viable solution.
TK1.4   Critically analyse monitoring tools that could be used to report on progress towards a successful solution.
TK1.5   Critically evaluate mechanisms to control changes in solution development.
TK1.6   Critically analyse the role of stakeholders in solutions development.

Chartered competence 22 - Sustainability

The ability to balance the environmental, social, economic, and administrative considerations that will impact a project.

Introduction

Sustainability involves taking individual and organisational responsibility to ensure outputs, outcomes and benefits are sustainable over their life cycles, meeting the current needs of stakeholders without compromising or over burdening future generations. In addition, change initiatives need to be delivered through sustainable working practices and methods. Sustainability is so significant and important, that projects need to proactively alter behaviours and apply methods that ensure these considerations become second nature.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically evaluate how the sustainability agenda of an organisation informs business activity.
TK1.2 Critically evaluate the impact sustainability priorities can have
TK1.3 Critically evaluate mechanisms that can be used to embed sustainability.
TK1.4 Critically analyse ways to communicate sustainability measures.
TK1.5 Critically analyse what information is needed to confirm that sustainability practices are being followed and/or continually improved.
TK1.6 Critically analyse ways in which to remain up to date with the latest thinking in changes in sustainability practices.

Chartered competence 23 - Transition management

The ability to manage the integration of the outputs of a project into business-as-usual (BAU), ensuring that outputs enable delivery of the intended value.

Introduction

Transition management is multi-faceted, its purpose being to facilitate changed capability, bedding in new processes, practices, and tools and techniques. It includes organisational change management and directing benefits realisation management.

Technical knowledge assessment criteria
You need to demonstrate a minimum of four of the following assessment criteria to show that you can:
TK1.1 Critically evaluate the strategies and/or techniques that can support transition planning <u>and</u> activities.
TK1.2 Critically analyse the knowledge transfer needed to ensure a successful change transition within an organisation.
TK1.3 Critically evaluate the different approaches for transition management.
TK1.4 Critically evaluate the ways in which the progression of a transition process can be determined and agreed.
TK1.5 Critically analyse the importance of the ownership of benefits.

Appendix 3:

All routes include a mandatory assessment on Ethics, Compliance and Professionalism at interview. The interviewers will ask you to:

• define ethical behaviour

and

• ask up to two questions relating to your competence against the criteria

Where _and_ is underlined, you must provide evidence for all aspects of the competence criteria.

Ethics, compliance and professionalism

The ability to embody, promote and maintain a trusted profession and to navigate the cultural, legal, and regulatory environment.

Introduction

Ethics, compliance, and professionalism encompass working consistently in a moral, legal, and socially responsible manner.

Ethics, compliance and professionalism criteria
1.1　Identified how organisational context influenced ethics and compliance for a project.
1.2　Reconciled organisational and professional codes of conduct to facilitate understanding and collaboration.
1.3　Identified deviations from accepted ethical behaviours <u>and</u> responded in a professional way.
1.4　Acted within the limits of your own competence and authority and responding where circumstances require escalation.
1.5　Exploited opportunities to support continuing professional development.
1.6　Encouraged <u>and</u> enforced a safe and effective working environment.
1.7　Involved specialist, professional and/or legal resources for compliance or ethics escalation.
1.8　Demonstrated integrity beyond the expectations of your role or authority.

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We are the only chartered membership organisation for the project profession