



**The Chartered
Project Professional**
A consultation on the
new Chartered standard

THE CHARTERED BODY FOR THE PROJECT PROFESSION

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1. Foreword

As the Chartered body for the project profession, the Association for Project Management (APM) faces the key task of developing the Chartered standard to underpin the profession's new status. The creation of a robustly assessed register of Chartered Project Professionals who are committed to professional development and a code of conduct will raise standards in project management¹ for the benefit of society and the economy.

This is a significant moment in the history of the project management profession as a whole, and of APM in particular. However, it is important to acknowledge the hard work that led to this achievement. We are privileged to share this success with those who laid the foundations for the association and the discipline we now know as project management. To reach this point in a single generation is a remarkable achievement, and a testament to the tenacity, resourcefulness and professionalism of all concerned.

This consultation presents the proposed positioning and methodology of the new Chartered standard. It has been benchmarked against similar standards in other professions, while recognising the attributes that make the project professional unique. The outcomes of the benchmarking show that there are a variety of ways to approach a Chartered standard. However, the commonalities between standards were as follows:

- The majority of standards asked for an element of technical knowledge.
- All expect relevant work experience.
- There is a move away from a purely time-served approach to an assessment of competence.

APM will work with government, the private sector and professional bodies to raise the profile, awareness and understanding of project management. We want the standard to be a recognisable mark of quality, setting the standards of professionalism and performance across all sectors, and assuring, clients, employers and the wider public of the quality of Chartered project professionals.

John McGlynn
Chairman, APM

¹ In this consultation, the phrase 'project management' includes those working in project, programme or portfolio management, or in a key control function



2. Introduction

APM is a membership association, professional body and charity. It was first incorporated in 1972 and commenced operation under its Royal Charter on 1 April 2017. APM's mission is to 'inspire communities to deliver meaningful change for societal benefit by advancing the art, science, theory and practice of project management'. Detail on APM and its Charter can be found at apm.org.uk

One of the key tasks for APM is to develop a Chartered standard to underpin the profession's new status. APM believes the Chartered Project Professional standard will bring significant benefits to individuals, organisations and the wider public. The creation of a robustly assessed register of Chartered Project Professionals who are committed to professional development and a code of conduct will raise standards in project management² for societal and economic benefit.

APM recognises that project management is a relatively young profession, and the proposals for the new Chartered standard reflect this. Many of those involved in project management have great practical experience that may qualify them for Chartered status via the proposed experiential route. Others have existing qualifications that may count towards the proposed qualification route.

APM will keep the Chartered standard under review, with the aim of continuing to drive up standards in the profession.

APM will create and maintain a register of Chartered Project Professionals in accordance with the terms of its Royal Charter and By-laws. APM members and non-members can apply for Chartered status. On successful entry onto the register, Chartered Project Professionals will be entitled to use the post-nominal ChPP.

Significant work has gone into developing these proposals, which have been approved for consultation by the APM board. This consultation sets out the proposed positioning and content of the Chartered standard, the framework for the recognition of assessments and draft regulations.

We are asking for responses to APM's proposals for the new standard and routes to achieving it. APM is seeking informed feedback from interested parties. This feedback will be considered, and will help formulate the final standard and the routes to achieving it.

Draft formal regulations detailing the proposals in the consultation are set out in Appendix 1. These would be supplemented by technical and administrative guidance and processes.



² In this consultation, the phrase 'project management' includes those working in project, programme or portfolio management, or in a key control function



3. Deadlines and responding

The main and preferred method for your response is the dedicated web page. This portal is independently managed for APM by YouGov, which will review all statistical and free-text responses and provide an independent report to APM. Please respond to the consultation by accessing <https://start.yougov.com/refer/vIGCldJLLvrc6r>

A summary of the consultation questions appears in Appendix 2.

You will be asked whether you are responding as an individual or on behalf of an organisation or company. If you are responding on behalf of a professional body or similar organisation, please make it clear who the organisation represents and, where applicable, whether the views of members were obtained.

This consultation was issued on 31 July 2017.

Responses must be received by **22 September 2017**.

If you have any technical queries, require a printed copy of the consultation document, or need to respond by email or letter, please contact darren.yaxley@yougov.com

Please note: APM does not intend to respond individually to responses received. We will publish a summary of consultation responses. We also may wish to publish unattributed excerpts from some responses as examples.

"The proposed standard is intended to meet the requirements of and encapsulate the key competences required by the profession"

4. Positioning of the Chartered standard

The Chartered Project Professional standard will be a rigorous professional benchmark that demonstrates achievement of a defined level of technical knowledge, professional practice and professional ethical behaviour. The proposed standard is intended to meet the requirements of and encapsulate the key competences required by the profession.

The proposed standard has been benchmarked against similar standards in other professions, while recognising the attributes that make the project professional unique. APM recognises the need for the Chartered standard to be both rigorous and accessible, and expects individuals to be able to access the standard when they are ready to meet the requirements (see section 5). This is likely to be within a decade of entering the profession.

It is proposed that the Chartered Project Professional standard will be open to individuals who are directly involved in the delivery of projects, programmes or portfolios or who work in an associated key control function and who are currently active. An individual's active status will be assessed on application and via a continuing declaration on renewal.

Chartered Project Professionals will be able to demonstrate:

- advanced technical knowledge and understanding of how to deliver projects/programmes/portfolios, taking into account many interacting factors and different potential approaches;
- successful application of this knowledge to deliver projects/programmes/portfolios that involved:
 - uncertainty or conflicting objectives;
 - high levels of unpredictability or risk;
 - multiple work packages/projects/programmes; and
 - multiple interdependent stakeholders, possibly with competing interests.
- commitment to professional ethics; and
- currency of practice and commitment to continuing professional development (CPD).

Ethics and CPD

Chartered Project Professionals will be bound by a code of conduct. APM proposes that its current *Code of Professional Conduct* and CPD requirements be adopted for the Chartered standard as robust and proven models. The *Code of Professional Conduct* is available [here](#), and the CPD requirements are available [here](#).

The wording and requirements of each of these may be refined in accordance with decisions by the APM board to meet the changing needs of the profession and the Chartered standard. Applicants' understanding of, and commitment to, ethical behaviours will also be assessed as part of the interview process and CPD requirements.

Key consultation question from this section

To what extent do you either agree or disagree that the proposed positioning for the Chartered standard is appropriate? Why do you say that?

“It is proposed that applicants will need to demonstrate their technical knowledge and professional practice across competences sourced from APM’s *Competence Framework* as part of the process to achieve admission to the register”

5. Achieving the Chartered standard

5.1 Requirements

To achieve the Chartered standard and entry onto the register, an individual will need to have:

- passed an assessment of technical knowledge in the competences detailed in section 5.2 (see also section 5.3 for alternative ways of achieving this);
- passed an assessment of professional practice in the competences detailed in section 5.2 (see also section 5.3 for alternative ways of achieving this);
- provided two references in support of their application, related to work carried out within the past two years, to demonstrate they are professionally active;
- demonstrated 35 hours of CPD and reflective learning in the past 12 months, and committed to continuing to comply with the CPD requirements; and
- committed to the *Code of Professional Conduct* and provided evidence of an understanding of an ethical way of working as part of an interview process.

5.2 Technical knowledge and professional practice

It is proposed that applicants will need to demonstrate their technical knowledge and professional practice across the below competences as part of the process to achieve admission onto the register. These are sourced from APM’s *Competence Framework* and advanced role profiles, which will continue to be periodically reviewed and updated. The competences proposed for launch are split between core and elective, as follows:

Core competences (applicants will need all 13)	Options for elective competences (applicants will need only five of these)
Ethics, compliance and professionalism	Procurement
Team management	Contract management
Conflict management	Requirements management
Leadership	Solutions development
Budgeting and cost control	Schedule management
Risk and issue management	Resource management
Consolidated planning	Quality management
Governance arrangements	Transition management
Stakeholder and communication management	Financial management
Reviews	Resource capacity planning
Change control	Frameworks and methodologies
Business case	Independent assurance
Benefits management	Asset allocation
	Capability development

Applicants will need to demonstrate evidence of **both** technical knowledge and professional practice against all of the core competences and five of the elective competences. For further details regarding the competences, see Appendix 3.

"Having successfully demonstrated the required evidence, applicants will need to undergo an assessment interview. All candidates will be asked about their commitment to CPD, the application of their knowledge and their understanding of professional ethics"

5.3 Access routes to achieving Chartered status

There are two routes to achieving Chartered status: the experiential route and the recognised assessment route. (Please note that, for both routes, applicants will need to meet all the requirements detailed in section 5.1.)

Applicants required to provide a written submission for either route will need to give an overview of between two and four projects/programmes or portfolios as context. These will need to have been undertaken within five years of the application date, to demonstrate the applicant is professionally active, and be at the level required by the Chartered standard, as set out in section 4.

Experiential route

The experiential route will require applicants to demonstrate a minimum of seven years of project management³ experience and provide a written submission containing evidence of each of the competences for technical knowledge and professional practice.

Recognised assessment route

Assessments – for example, qualifications or training programmes – can be recognised by APM as demonstrating the required evidence towards achieving the Chartered standard. (For further detail on obtaining approvals for such assessments, see section 6.) A recognised assessment can count towards either meeting the technical knowledge requirements or meeting the technical knowledge and professional practice requirements. If the recognised assessment does not cover all these requirements, a written submission providing evidence of the remaining competences will also be needed.

Assessment of the written submission/recognised assessment evidence

The written submission and/or the recognised assessment evidence (if appropriate) will be reviewed and assessed prior to applicants proceeding to interview.

5.4 Further steps

Assessment interviews

Having successfully demonstrated the required evidence set out in section 5.3, applicants will need to undergo an assessment interview. The length and format of the interview is likely to vary depending on the evidence submitted. However, to complete the assessment, all candidates will be asked about their commitment to [CPD](#), the application of their knowledge and their understanding of professional ethics.

Final approval by panel

The outcomes of the total assessment will then be submitted to a panel for final approval. The panel will confirm that required processes have been fully followed and will be able to grant Chartered Project Professional status and approve entry to the register.

Key consultation questions from this section

To what extent do you either agree or disagree that the proposed assessment model for the Chartered standard is appropriate?

How likely (if at all) do you think it is that your organisation/company would:

- recognise the standard
- support the standard?

Why do you say that? If applicable, how would your organisation support it?

³ In this consultation, the phrase 'project management' includes those working in project, programme or portfolio management, or in a key control function

“Once the Chartered standard is finalised and published, APM will review its own assessments to determine whether these meet the above requirements. This will include the Registered Project Professional standard and the Project Professional Qualification”

6. Recognition of assessments

It is proposed that individuals will be eligible to apply via the recognised assessment route to achieve Chartered status if they hold one or more assessments that have been approved for this purpose by APM. The relevant awarding body will need to submit an application to APM for this approval.

APM invites responses from awarding bodies/organisations that are interested in seeking approval of one or more of their own assessments for this purpose, and welcomes early expressions of interest from applicable awarding bodies/organisations.

An awarding body/organisation will be able to apply to APM to have their assessment recognised as either:

- a) meeting the technical knowledge requirements; or
- b) meeting the technical knowledge and professional practice requirements.

For an assessment to be recognised as meeting the requirements of the standard, an awarding body/organisation will need to demonstrate that it:

- is at least at the required level for technical knowledge and professional practice set out in section 4;
- as a minimum, covers 11 of the core and two of the elective competences; and
- is externally regulated by an approved body (such as Ofqual), or meets the quality requirements of ISO17024.

This evidence will be submitted to APM for review and approval. It is proposed that any recognition granted will be valid for a period of three years, subject to terms and conditions, and will also require the awarding body/organisation to submit an annual report on the relevant assessment(s) to ensure any changes are captured and reviewed.

APM's assessments

Once the Chartered standard is finalised and published, APM will review its own assessments to determine whether these meet the above requirements. This will include the Registered Project Professional (RPP) standard and the Project Professional Qualification (PPQ). Without prejudice to that work, it is currently envisaged that those who have achieved RPP will have achieved the technical knowledge and professional practice requirements, and that those achieving PPQ will have met the technical knowledge requirements. All other requirements, as detailed in section 5.1, will still need to be met.

Key consultation question from this section

To what extent do you either agree or disagree that the proposed recognition of other assessments for the Chartered standard is appropriate? Why do you say that?

Appendix 1 – Draft APM regulations – entry onto the register of Chartered Project Professionals

- 1.1 In accordance with the terms of the Royal Charter and By-laws, APM will operate and manage access to a register of Chartered Project Professionals.
- 1.2 Those who successfully pass the assessment process will be entitled to call themselves a Chartered Project Professional, and to use the post-nominal ChPP.
- 1.3 The board will determine the Chartered standard, the processes for individuals to obtain the Chartered standard and any recognised assessment (exemptions) framework. It will do so on the advice of the Professional Standards and Knowledge Committee. Minor procedural, guidance and administrative matters may be delegated to the committee in accordance with board-approved terms of reference.
- 1.4 An individual may apply for entry onto the register of Chartered Project Professionals if they are actively practising in project, programme or portfolio management, or in an associated key control function at the level defined in the standard.
- 1.5 To achieve Chartered status and entry onto the register of Chartered Project Professionals, applicants must:
 - pass an assessment of technical knowledge in the areas detailed in the standard;
 - pass an assessment of professional practice in the areas detailed in the standard;
 - provide two work references in support of their application, related to work carried out within the past two years;
 - demonstrate 35 hours of CPD and reflective learning in the past 12 months, and commit to continuing to comply with APM's CPD requirements;
 - commit to the *APM Code of Professional Conduct* and provide evidence of an understanding of an ethical way of working as part of the interview process and CPD requirements; and
 - pay an assessment fee and an annual registration fee.
- 1.6 The assessment of the applicant's technical knowledge and professional practice will be against a board-approved suite of core and elective competences. Applicants may demonstrate competence by passing approved recognised assessment and/or via a written submission detailing experience demonstrating those competences. All applicants will undertake an interview as part of their competence assessment. The interview will include an assessment of the individual's understanding of and commitment to professional ethics.
- 1.7 APM will maintain a panel, which will review the recommended outcomes from the assessment process. The panel will ensure compliance with process and formally approve applicants obtaining Chartered status and admission onto the register of Chartered Project Professionals.
- 1.8 All Chartered Project Professionals are required to confirm their commitment to the *APM Code of Professional Conduct*. Breaches of the code will be actionable in accordance with the code's procedural rules. Sanctions open to the Professional Conduct Committee will include removal from the register of Chartered Project Professionals.
- 1.9 All Chartered Project Professionals will be required to comply with the APM scheme for CPD to maintain their entry on the register and remain professionally active. In accordance with the scheme, APM will make arrangements to audit the CPD records of Chartered Project Professionals.

- 1.10 The register of Chartered Project Professionals is open to APM members and non-members. Chartered Project Professionals will not have the rights or benefits of APM membership unless they successfully apply to be an APM member.
- 1.11 Chartered Project Professionals will be granted entry onto the register of Chartered Project Professionals. The register will be open for inspection on the APM website. In accordance with data protection requirements, Chartered Project Professionals will have the right to anonymity and may request that their details do not appear on the public register.
- 1.12 To remain on the register, Chartered Project Professionals must:
 - pay an annual registration fee; and
 - confirm that they remain professionally active, and commit to the *APM Code of Professional Conduct* and CPD requirements.
- 1.13 Chartered Project Professionals whose registration has lapsed may rejoin the register within a three-year period by proving their CPD is up to date.

Key consultation questions from this section

Do you have any comments on the proposed regulations?

Are there any issues relating to the proposed Chartered standard that have not been mentioned yet that you feel APM should take on board?

Appendix 2 – Summary of key consultation questions

Section 4

To what extent do you either agree or disagree that the proposed positioning for the Chartered standard is appropriate? Why do you say that?

Section 5

To what extent do you either agree or disagree that the proposed assessment model for the Chartered standard is appropriate?

How likely (if at all) do you think it is that your organisation/company would recognise and/or support the standard?

Why do you say that? If applicable, how would your organisation support it?

Section 6

To what extent do you either agree or disagree that the proposed recognition of other assessments for the Chartered standard is appropriate? Why do you say that?

Appendix 1

Do you have any comments on the proposed regulations?

Are there any issues relating to the proposed Chartered standard that have not been mentioned yet that you feel APM should take on board?

Appendix 3 – Detail on the required competences

A description for each competence is given in the table below

Core competences (evidence needed for all 13)	Options for elective competences (evidence needed for five of these)
Ethics, compliance and professionalism ■ The ability to promote the wider public good in all actions, and to act in a morally, legally and socially appropriate manner in dealings with stakeholders and members of project teams and the organisation.	Procurement ■ The ability to secure provision of resources needed for change initiative(s) from internal and/or external providers.
Team management ■ The ability to select, develop and manage teams.	Contract management ■ The ability to agree contracts for the provision of goods and/or services, to monitor compliance and to manage variances.
Conflict management ■ The ability to identify, address and resolve differences between individuals and/or interest groups.	Requirements management ■ The ability to prepare and maintain definitions of the requirements of change initiatives.
Leadership ■ The ability to empower and inspire others to deliver successful change initiatives.	Solutions development ■ The ability to determine the best means of satisfying requirements within the context of the change initiative's objectives and constraints.
Budgeting and cost control ■ The ability to develop and agree budgets for change initiatives, and to control forecast and actual costs against the budget.	Schedule management ■ The ability to prepare and maintain schedules for activities and events for change initiatives, taking account of dependencies and resource requirements.
Risk and issue management ■ The ability to identify and monitor risks (threats and opportunities), to plan and implement responses to those risks, and to respond to other issues that affect the change initiative.	Resource management ■ The ability to develop, implement and update resource allocation plans (other than finance) for change initiatives, taking account of availabilities and scheduling.
Consolidated planning ■ The ability to consolidate and document the fundamental components of a change initiative: scope; schedule; resource requirements; budgets; risks; opportunities and issues; and quality requirements.	Quality management ■ The ability to develop, maintain and apply quality management processes for change initiative activities and outputs.

Governance arrangements

- The ability to establish and maintain governance structures that define clear roles, responsibilities and accountabilities for governance and delivery of change initiatives, and that align with organisational practice.

Transition management

- The ability to manage the integration of the outputs of change initiatives into business-as-usual, addressing the readiness of users, compatibility of work systems and the realisation of benefits.
-

Stakeholder and communication management

- The ability to manage stakeholders, taking account of their levels of influence and particular interests.

Financial management

- The ability to plan and control the finances of programmes or portfolios and their related change initiatives, as a means of driving performance and as part of the organisation's overall financial management.
-

Reviews

- The ability to establish and manage reviews at appropriate points, during and after change initiatives, which will inform governance of the change initiatives, by providing evaluations of progress, methodologies and continuing relevance.

Resource capacity planning

- The ability to prepare and maintain an overall schedule for resource use in related change initiatives, which avoids bottlenecks and conflicting demands, and which sequences outcomes in order to enable efficient realisation of benefits.
-

Change control

- The ability to establish protocols to alter the scope of change initiatives, implementing the protocols when necessary, and updating configuration documentation, including contracts to develop, maintain and apply quality management processes for change initiative activities and outputs.

Frameworks and methodologies

- The ability to identify and/or develop frameworks and methodologies that will ensure management of change initiatives will be comprehensive and consistent across different initiatives. (In this context, 'framework' means the parameters, constraints or rules established to standardise delivery.)
-

Business case

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

Independent assurance

- The ability to gather independent evidence that the information from the change initiative is valid, and that the change initiative is likely to achieve its aims.
-

Benefits management

- The ability to identify, define, evaluate, plan, track and realise the business benefits of change initiatives.

Asset allocation

- The ability to recommend how financial and other resources should be allocated among change initiatives in order to optimise the organisation's return on investment (ROI).
-

Capability development

- The ability to assess organisational maturity in relation to project, programme and portfolio management; identify the additional capabilities required; and help with the development of those capabilities.

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