Chartered Project Professional competences

Mandatory and elective

This document will support your chartered application, please ensure you read this in conjunction with the Chartered Project Professional Guidance.

Chartered competences

In this document, the term 'project' is used to mean project, programme, portfolio or a key control function.
Where **and** is underlined, you must provide evidence for all aspects of the competence criteria.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Budgeting and cost control	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.	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 and 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.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Financial management	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 **and** analyse the financial performance of a project.	You need to demonstrate a minimum of four of the following assessment criteria to show that you have: **PP1.1** Established capital **and** 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 and approval of budget variances. **PP1.4** Arranged for the release of funds at appropriate stages in a project. **PP1.5** Established financial reporting milestones and 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

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Change control	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 **and** 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.	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 **and** maintained a suitable change control process. **PP1.3** Captured **and** 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 **and** 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 **and** updated stakeholders as necessary. **PP1.7** Updated plans **and** 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.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Conflict resolution	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.	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 **and** 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 **and** 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.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Governance arrangements	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 **and** organisational governance. **TK1.3** Critically analyse the effect of organisational culture **and** 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.	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, **and** levels of authority for a project. **PP1.2** Established the relationship between a project's governance **and** 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 **and** 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.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Reviews	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.	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 **and** 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 **and** responses to, the deviations. **PP1.5** Communicated the outcomes of reviews to relevant stakeholders. **PP1.6** Confirmed stakeholder understanding **and** acceptance of proposed actions. **PP1.7** Implemented agreed actions **and** updated lessons learned. **PP1.8** Conducted and documented a close out review.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Integrated planning	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.	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.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Schedule management	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 **and** 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.	You need to demonstrate a minimum of four of the following assessment criteria to show that you have: **PP1.1** Defined tools **and** techniques for creating **and** updating a schedule. **PP1.2** Established units of measure to accurately define activities **and** events to be completed during a project. **PP1.3** Developed duration estimates **and** critical dates for each activity and event. **PP1.4** Determined relationships **and** dependencies between activities and events, when constructing a schedule. **PP1.5** Documented a schedule of phases, milestones, **and** 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.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Leadership	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 **and** 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.	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.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Team management	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.	You need to demonstrate a minimum of four of the following assessment criteria to show that you have: **PP1.1** Agreed team objectives **and** 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 **and** facilitate effective ownership of delegated tasks. **PP1.4** Built a relationship of trust **and** 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 **and** team needs. **PP1.6** Provided opportunities for coaching **and/or** 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 **and** promoted continued professional development.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Risk and issue management	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.	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 **and** suitable responses. **PP1.3** Assessed the probabilities **and** impacts of risks **and** planned their responses. **PP1.4** Captured **and** recorded issues, how they were resolved, and their implications to inform planning for future projects. **PP1.5** Reacted, assessed, **and** planned responses to issues. **PP1.6** Implemented responses to risks **and** issues including escalation, recording lessons learned. **PP1.7** Transferred and/or formally closed unresolved risks at the end of a project or phase.

Mandatory 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Stakeholder engagement and communication management	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 **and** media available for project communications. **TK1.6** Critically evaluate how stakeholders can provide feedback.	You need to demonstrate a minimum of four of the following assessment criteria to show that you have: **PP1.1** Determined stakeholder interests, **and** levels of influence for a project. **PP1.2** Produced a communication plan **and** undertaken effective stakeholder engagement based upon it. **PP1.3** Monitored effectiveness of the communication plans **and** stakeholder engagement activities. **PP1.4** Adjusted the communication plan **and** responded to any changing stakeholder engagement needs. **PP1.5** Employed relevant communication methods **and** media to meet stakeholder requirements and expectations. **PP1.6** Disseminated clear, timely **and** relevant information to stakeholders. **PP1.7** Obtained, **and** responded to, feedback from stakeholders which may have an impact on a project.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Assurance	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, **and** 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 **and** 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.	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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Benefits management	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 **and** 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.	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 **and** 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 **and** 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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Business case	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.	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 **and** ongoing formal acceptance of a business case. **PP1.6** Implemented a change control process **and** configuration management system when updating a business case. **PP1.7** Monitored **and** refined a business case as circumstances and factors demanded.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Capability development	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 **and** techniques to determine an organisation's ability to uplift its capability **TK1.5** Critically evaluate the options for developing an ongoing people development plan.	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 **and** techniques to determine an organisation's capability to support skills development. **PP1.3** Created or adapted a training **and** 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 **and** evaluated organisational learning against the capability development objectives. **PP1.7** Adapted the strategy **and** model to the needs of a changing environment. **PP1.8** Embedded an on-going learning culture in the organisation.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Contract management	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 **and** approaches to managing contractual changes. **TK1.5** Critically analyse the process **and** 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.	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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Diversity and inclusion	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.	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 **and** how these can impact individuals at work. **PP1.2** Actively identified and engaged with diverse skill sets **and** individual traits that constitute a team. **PP1.3** Recognised the potential effects of personal bias **and** cultural norms that may be influential on perspective and judgement. **PP1.4** Created **and** sustained a positive, inclusive working environment and identified opportunities for inclusion. **PP1.5** Maximised the opportunities presented by a diverse team **and** led them to a common purpose. **PP1.6** Established a cohesive culture that supported both organisational governance **and** appropriate values and behaviours. **PP1.7** Actively explored and responded to signs of bias that could impact individual and/or team cohesion and performance.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Life cycles	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 **and** 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 **and** making refinements as required. **TK1.6** Critically evaluate the challenges of introducing a new life cycle framework to an organisation.	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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Portfolio shaping	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.	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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Procurement	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 **and** 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.	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, **and** quantity of the resource requirement. **PP1.4** Evaluated technical **and** commercial options for fulfilling the requirements. **PP1.5** Agreed contracts and statements of work in line with organisational requirements. **PP1.6** Negotiated **and** secured resources to effectively deliver a project. **PP1.7** Complied with organisational procedures when selecting and negotiating with suppliers.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Quality management	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.	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 **and** outputs of the project with reference to the business case and project plans. **PP1.2** Created or adapted a quality management plan involving stakeholders and 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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Requirements management	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 **and** 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.	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 **and** 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, **and** needs based on research. **PP1.4** Determined the dependencies **and** 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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Resource capacity planning	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 **and** 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 **and** constraints.	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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Resource management	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.	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 **and** 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 **and** time constraints. **PP1.6** Monitored resource use against a schedule during a project **and** identify variances that require action. **PP1.7** Refined a resource schedule using a change control process.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Solutions development	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 **and** techniques potentially used to identify options to deliver a project. **TK1.2** Critically analyse tools **and** 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.	You need to demonstrate a minimum of four of the following assessment criteria to show that you have: **PP1.1** Used tools **and** techniques to identify options to satisfy project requirements. **PP1.2** Used tools **and** 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, **and** 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.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Sustainability	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.	You need to demonstrate a minimum of four of the following assessment criteria to show that you have: **PP1.1** Promoted **and** adhered to sustainable working practices that support organisational standards. **PP1.2** Determined the sustainability vision **and** objectives for a project and assessed ways to achieve them. **PP1.3** Established stakeholder perception **and** actively managed sustainability expectations and outcomes. **PP1.4** Employed techniques to embed a culture of sustainability within a project **and** 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 **and** encouraged sustainability and accountability at all levels. **PP1.7** Monitored emergent sustainability initiatives **and** promoted efficiencies to facilitate sustainability in a project or organisation.

Elective 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.

Competence name	Technical knowledge assessment criteria	Professional practice assessment criteria
Transition management	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 **and** 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.	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, **and** 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.

All pathways include a mandatory assessment on Ethics, compliance and professionalism at interview. The interviewers will ask you to:

• define ethical behaviour

and

• ask two questions relating to your competence against the criteria

Chartered competence 24 – 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.

Competence name	Assessment criteria
Ethics, compliance and professionalism	**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 **and** 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 **and** 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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