Guidance notes

Association for Project Management

A helpful guide for your recognised assessment application

Recognised Assessment Guidance Notes

Because when projects succeed, society benefits

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Further details

If you have any questions that aren't covered in these guidance notes, please contact:

The Recognised Assessment Team

Telephone: **0845 458 1944** or email: **recognisedassessment@apm.org.uk**

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Introduction

APM's chartered application process has been designed to be as accessible as possible, while still being a robust assessment of an individual's suitability. There are four different pathways open to project professionals depending on whether they completed a recognised programme and what that recognition is for.

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:
  - conflicting objectives.
  - high levels of unpredictability or risk.
  - multiple work packages/projects or programmes.
  - multiple interdependent stakeholders.
- Commitment to professional ethics.
- Currency of practice and commitment to continuing professional development (CPD).

Individuals will be eligible to apply via one of the recognised pathways to achieve chartered status if they hold one or more programmes that we have approved for this purpose. The relevant organisation will need to submit an application to us for approval. These guidance notes are to be used alongside the Recognised Assessment application form. If applying for pathway 3, please refer to the *APM Competence Framework*.

If applying for pathway 2 or pathway 4, please refer to the chartered competences in Appendix A of this document.

APM Recognised Pathway requirements

To progress your application, you are required to identify which pathway you are applying for.

The requirements for each recognised pathway are detailed below to enable you to select the most appropriate pathway for your organisation.

Pathway title	Pathway requirements
Pathway 2	• At the required level for technical knowledge. Aligns to SCQF (or equivalent) level 9 or above. • Externally regulated by an approved body or meets with the quality requirements. • Covers a minimum of 10 of the chartered competences, 7 of which must be selected from the mandatory competences.
Pathway 3	• Programme is a general project management programme levelled on SCQF (or equivalent) level 7 or above. • Internationally levelled. • Externally verified by an approved body. • Content alignment to a minimum of 10 competences on *APM Competence Framework*. • Contain pre/post requisites to validate applicants have; Bachelors degree (or equivalent) and 36 months experience of delivering projects within the last 8 years. Or 60 months experience of delivering projects within the last 8 years.
Pathway 4	• At the required level for technical knowledge and professional practice. Aligns to SCQF (or equivalent) level 9 or above. • Externally regulated by an approved body or meets with the quality requirements. • Covers a minimum of 10 of the chartered competences, 7 of which must be selected from the mandatory competences.

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Where a recognised assessment has a 'valid from and/or valid to' date, applicants for ChPP can only claim the recognised assessment as part of their application if they hold a valid certificate within the stated date range.

The application form should be completed with the support of this guidance document.

Data protection: We look after your data carefully; please go to: apm.org.uk/apm-privacy-statement for more details.

The requirements for the chartered applicant for each recognised pathway.

Pathway 1	Pathway 2	Pathway 3	Pathway 4
• Written submision including project overviews and written statements covering 12 professional practice competences. • 2 hour interview on professional practice and technical knowledge. • Questions on ethics.	• Written submission including project overviews and written statements covering 12 professional practice competences. • 1.25 hours interview on professional practice. • Questions on ethics.	• Written submission including project overviews and written statements covering 8 professional practice competences. • 1 hour interview on technical knowledge. • Questions on ethics.	• No written submission. • 0.5 hour interview covering CPD. • Questions on ethics.

Process

1. Expression of interest to us.
2. Completion of an application form and submission to us together with supporting evidence for the proposed recognised pathway.
3. Application checked for completeness.
4. Assignment of an APM assessor upon receipt of the initial fee.
5. Assessor review of the application and virtual meeting on a mutually convenient date.
6. Completion of the assessment and submission of a report by the assessor with a recommendation to APM.

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Completing the application form

Please complete all sections of the application form. The only section that isn't mandatory is Section 6 Additional Information, where you can provide further context for your application.

Where evidence is available in other documentation, please provide clear referencing in your application form (for example, page number and paragraph) and provide the additional information by attaching an appendix to your application. Any materials referred to within the application should be provided as a separate appendix.

The term programme refers to your course, qualification or training programme.

Section 1: Your organisation

1.1 In this document and the associated application form, the term 'organisation' includes both organisations and awarding bodies.

1.2 Please complete all parts of this section, including details of your main contact for the assessment and the name of your organisation.

Section 2: Your programme

2.1 Provide the name of the programme to be recognised. The name stated must be how your programme is advertised and must not conflict with the naming of any APM qualification titles. The name provided will be the name on your certificate, if the application is successful.

2.2 Confirming when your programme commenced under the format detailed within your application.

Any changes to quality, level or coverage of your programme and the detail and date of these changes must be declared. Changes may result in the validity of your programme being time bound to reflect when and what changes have been made.

2.3 Please specify which type of recognised pathway you are applying for (tick one box only). The application form identifies the areas needed for each type of recognition.

Note: Where there are options for pathways within an assessment e.g. different module combinations that can lead to different final awards, a maximum of 14 competences can be covered in a single application. Each final award must meet the coverage and level requirement and the application of the quality criterion must be the same.

2.4 Please indicate whether this is an initial application or a re-recognition application.

2.5 Please explain what method of assessment is used if applying for pathway 2 or 4.

2.6 Please detail the pre/post requisite requirements in place for your programme (pathway 3 only)

To meet with the requirements, as a minimum the pre/post requisites must include confirmation of:

- Bachelors degree (or equivalent) and 36 months experience in delivering projects within the past 8 years.

or

- 60 months of experience in delivering projects within the past 8 years.

2.7 Confirm how the pre/post requisite requirements are verified and logged by your organisation?

Please confirm how these are checked and recorded by your organisation. (pathway 3 only)

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Section 3: Quality

a Please indicate if your organisation, and your assessment is regulated by an approved external verification and recognition body. Please include dates for the period of recognition. This may include for example, Ofqual, Office for Students, or other international external verification or recognition bodies. If your organisation holds current ISO17024 accreditation, please include the period of accreditation.

If your organisation does not hold an external recognition, please complete section b. (This is an essential requirement for the pathway 3)

b *Only for completion by organisations who haven't completed **3a** and are applying for pathway 2 or pathway 4.*

1. Please include details of the assessment process from the point initial contact is made with the candidate through to its ultimate conclusion. Our assessors will expect to see evidence of how candidates are engaged, informed, supported and prepared.

   Evidence could include, but not limited to:

   - learning outcomes and assessment criteria
   - candidate guidance, including the approach taken to assessment
   - examples of communication

2. There should be evidence of how the needs of individual candidates are met, including the handling of any reasonable adjustments.

   Assessors will expect to see evidence of how the needs of individual candidates are identified in the first instance. Along with details on how this information is applied to the learning experience and all assessments being undertaken.

3. Please describe how impartiality is achieved. Consideration should be given to whether there are any potential conflicts of interest during the programme delivery and, if so, how these are addressed. As a matter of principle, we would not expect to see instances of conflict of interest.

   Those involved in assessment decisions will not have participated in the training or preparation of the candidate.

   However, in cases where a conflict of interest does arise, we would expect to see evidence demonstrating how conflicts are managed from application through to assessment decision. These principles should apply to applicants, candidates, and those who have been through the assessment.

4. Our assessors will expect to see evidence of how those making assessment decisions are recruited, trained, and equipped to ensure valid and fair assessments as part of an ongoing and standardised approach. You must provide information identifying the project management expertise of staff involved in the delivery of the assessment. The staff who manage and deliver your assessment should be appropriate to the learning outcomes and assessment requirements to be achieved. Confirm what provision is in place for their ongoing CPD.

5. You must explain how the assessment operates, identifying support staff, external suppliers, external accreditations, as well as auditing and evaluation, and quality control processes.

   Our assessors will expect to see evidence of internal verification taking place to ratify decisions being made on the candidate assessments. This should include your sampling strategy and how feedback is provided to those making assessment decisions.

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6. Our assessors will expect to see documented policies, procedures, and related documentation on how appeals and complaints are managed, including the the review/ escalation process. This should include how it is tracked, how the appellant is communicated with, how any actions are taken, monitored and enforced, where impartiality is ensured. A communication approach that factors in two-way communication is expected.
   This policy should be publicly available without request.
7. We will need evidence to show that your organisation has methods and procedures in place to ensure the fairness and validity of assessments.
   Evidence could include, but not limited to:
   - the approval process for assessment material.
   - appropriateness of the assessment method.
8. Evidence will be required to show that the assessment is monitored over time to confirm the ongoing comparability of assessments and their results. This may be qualitative and/ or quantitative, and may include but will not be limited to, pass/fail policy or processes, statistics for markers, managers' ratings, working within certain tolerances/fair judgements.
   Note: For re-recognition applications – where no changes have been made since the last recognition, we would expect to see updated examples of standardisation and quality activities that have taken place.

Section 4: Purpose and positioning

If you are applying for pathway 3 only, evidence could include, but not limited to:

- Programme objectives.
- Target audience.
- Enrolment process where prerequisites are required.
- Programme timeline and timetable.
- Training methodology used.

If you are applying for pathway 2 or pathway 4, you'll need to provide an overview of the assessment, to provide us with the details of the context of the assessment, its purpose and positioning.

Evidence could include, but not limited to:

- timeframes for the assessment, including key milestones.
- key features of the assessment process.
- sample assessment materials.
- progression routes.
- pre-requisites.
- target market/candidate profile.

Note: For re-recognition applications – where no changes have been made since the last recognition, please provide information on how the assessment has performed in the interim. If candidate applications are being used as supporting evidence, we would expect to see updated examples of these.

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Section 5: Coverage and level

If applying for pathway 3 only.

This table must be completed to provide mapping of where your programme meets with a minimum of 10 competencies from the *APM Competence Framework*.

You must specify where within your programme materials, coverage can be found.

The appropriate level will be confirmed through evidence of the external verification and confirmation that your programme is levelled on SCQF (or equivalent) to level 7 or above.

If applying for pathway 2 or pathway 4, the table must be completed to provide a mapping, demonstrating where a **minimum of 4 of the assessment criteria for each of the competences chosen** are covered. You must specify which criteria you think are covered in your assessment, using the assessment criteria reference (e.g. *TK1.1*, or *PP1.2*) and clearly signpost where in your materials evidence of that coverage can be found. You may find that evidence is found for one competence assessment criteria in another competence area within your materials.

To confirm coverage and level requirements are met, assessors will need to see examples of assessment material used, how these are assessed, and feedback given to candidates.

Evidence could include, but not limited to:

- sample examination questions.
- model answers.
- module descriptors.
- syllabus assessment criteria.
- assessment specifications.
- samples of candidates work.
- marking schemes.

Note: you are unable to use APM materials as evidence of meeting the requirements against either technical knowledge or professional practice competences.

For re-recognition applications where no changes have been made since the last recognition, we would expect to see updated examples of candidate work, if used as evidence.

Coverage (for pathway 2 and pathway 4 only)

You will need to provide evidence of the assessment covering a minimum of 10 of the *Chartered Competences* (see Appendix A), seven of which must be selected from the mandatory competencies.

Please refer to the chartered competences to provide a mapping of where the evidence is available at an assessment criteria level, and explain how a minimum of:

- Four assessment criteria are covered across each technical knowledge competence.

or

- Four assessment criteria are covered for each competence for both technical knowledge and professional practice (8 assessment criteria in total across each competence).

Your organisation should complete the mapping against all assessment criteria that you believe have been met, not just the minimum of four per competence. Your organisation may submit evidence against up to 14 competences.

The approach to mapping may vary by applicant, but applicants are expected to clearly indicate where in the materials, evidence of coverage of assessment criteria can be found. This may be in bullet point format with page numbers, or depending on how the materials are presented, in explanatory text supported by page numbers. All materials referenced within the application should be provided by attaching as appendices to your application.

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Level (for pathway 2 and pathway 4 only)

The evidence you provide must demonstrate how the assessment meets the level requirements and can be in the format of an overarching statement with supporting evidence.

The level assessed must be in line with the chartered standard requirements, which are:

- **Technical knowledge**
  Advanced technical knowledge and understanding of how to deliver projects/programmes/portfolios, taking into account many interacting factors and different potential approaches.
- **Professional practice**
  Successful application of this knowledge to deliver projects/programmes/portfolios that involved:
  - conflicting objectives
  - high levels of unpredictability or risk
  - multiple work packages/projects or programmes
  - multiple interdependent stakeholders

The table in section 5 is a mandatory component to be completed. Your organisation needs to complete the table for either pathway 2, or for pathway 4, depending on the nature of the Recognised Pathway being applied for as specified on your response to 2.3.

Assessments will sit at a level aligning to or above the following:

SCQF	RQF/QCF	Higher Education
Level 9	Level 6	Bachelor's Degree

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Section 6: Additional information

Completion of this section is not mandatory, but you may wish to provide additional information for context, to assist the assessor in determining the extent to which your application meets the recognised pathway requirements.

Note: This section is not used against any assessment criteria but for context only.

Section 7: Declaration

Please sign and date the application form, acknowledging that you've received, read and understood the guidance materials to support your application.

The member of staff completing and signing the application on behalf of the organisation will be expected to be in a position of knowledge and responsibility to discuss the application in greater depths with the APM assessor.

Please ensure that all parts of the report are completed before returning it to us at recognised.assessments@apm.org.uk

If the material you're submitting is confidential, please email our recognised assessment email box above and we will send you a link to a secure site.

Check List

Section 1: Your organisation	
Section 2: Your programme	
Section 3: Quality	
Section 4: Purpose and positioning	
Section 5: Coverage and level	
Section 6: Additional information	
Section 7: Declaration	
Copies of any materials referenced within the application provided	

What happens next?

Once an application form and supporting material is received, together with the initial fee, and providing everything is in order, we would expect to complete an assessment within six to eight weeks. This is dependent upon you and your assessor's availability.

The assessor will arrange an online meeting with you to discuss the application. The outcome of the initial assessment by an assessor will be:

- Accept.
- Further information is required.
- Does not meet the criteria.

If further information is required on completion of the assessment, you'll have a maximum of 3 months to provide this information, after which point a full reapplication will be required.

On review of the additional information, an assessor's decision will be either:

- Accept.
- Does not meet the criteria.

If you do not meet the criteria at this point a full re-application and associated fees will be applicable.

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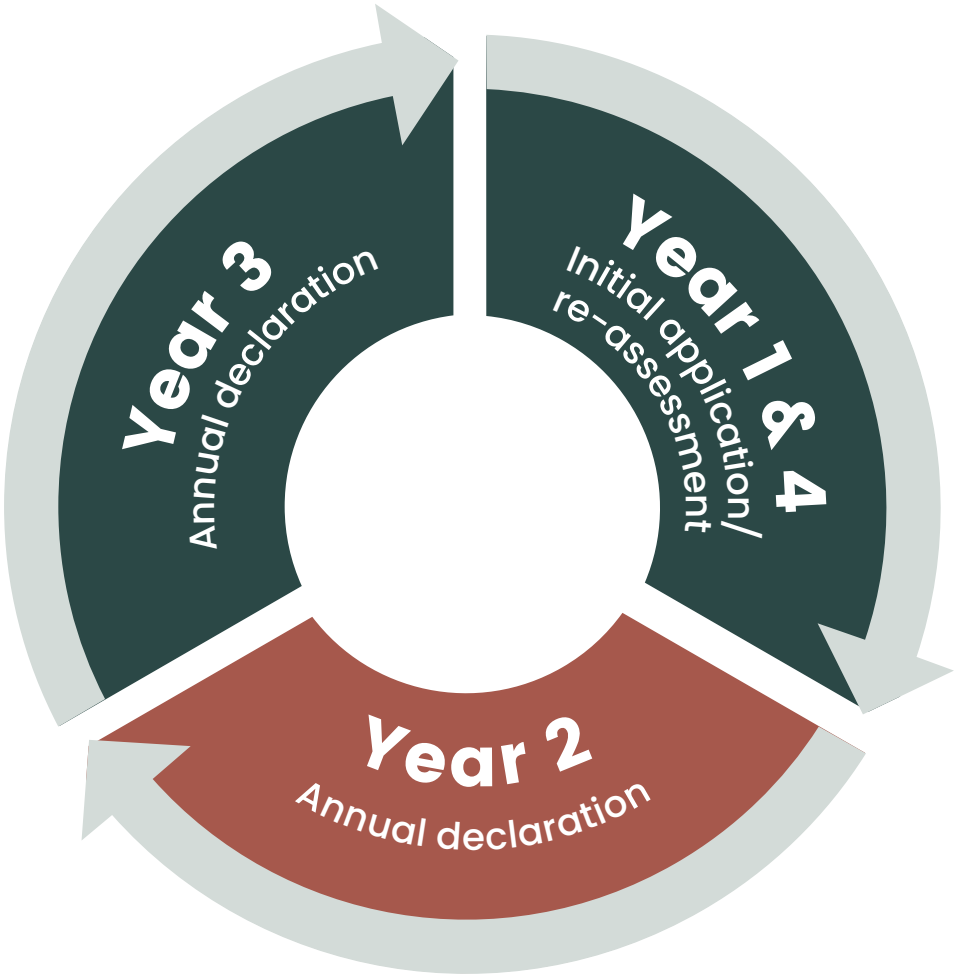
Ongoing requirements

Recognised assessment runs on a three year cycle. In year four, a full re-assessment of your assessment is needed which would follow the same process as outlined on page 4. In intervening years, an annual declaration is needed. Fees will apply at initial application and re-assessment in year 4.

Where a recognised assessment is no longer awarded, you may apply for the assessment to remain on the recognised assessment register, for which a nominal fee will be charged every 3 years.



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Appendix A

Chartered competences

This document provides both the mandatory and elective chartered competences and the criteria for both technical knowledge and professional practice.

It is provided in this format to support the mapping required by organisations when completing their application for recognised assessment, and any mapping of level and coverage of any assessment must be completed against the criteria contained here. Please see the Recognised Assessment application form and guidance notes for further information. For further information for individual applicants for chartered, please see the chartered guidance notes.

Each competence has specific assessment criteria which are provided for both technical knowledge, and professional practice.

Mandatory		Pages
1a	Budgeting and cost control	13
1b	Financial management	14
2a	Change control	15
2b	Conflict resolution	16
3a	Governance arrangements	17
3b	Reviews	18
4a	Integrated planning	19
4b	Schedule management	20
5a	Leadership	21
5b	Team management	22
6	Risk and issue management	23
7	stakeholder engagement and communication management	24

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

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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.

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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

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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.

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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.

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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.

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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 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.

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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.

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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.

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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.

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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.

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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 Capture 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.

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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.

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

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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.

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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.

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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.

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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.

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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.

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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.

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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.

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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.

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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.

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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.

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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 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.

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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.

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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.

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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.

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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.

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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.

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Association for Project Management
Ibis House, Regent Park, Summerleys Road
Princes Risborough, Bucks HP27 9LE
0845 458 1944
apm.org.uk

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