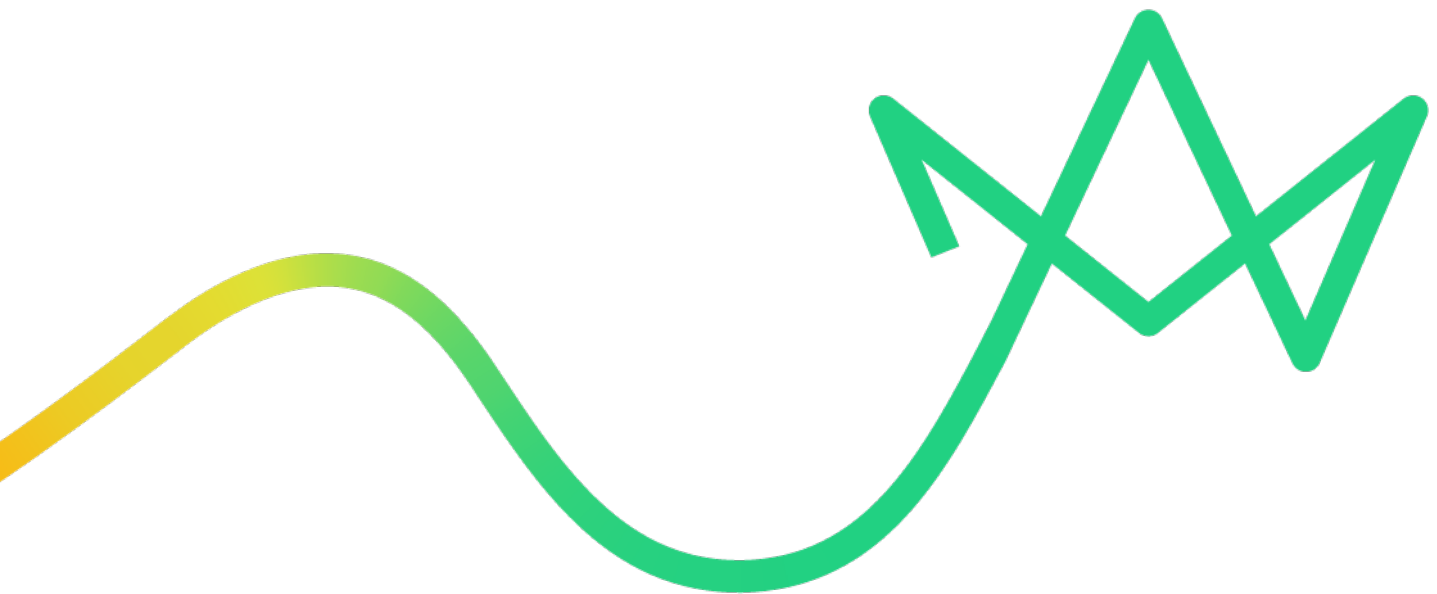


Chartered Project Professional (ChPP)

Competences and Evaluation Standards



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Technical Knowledge – Competences

Definition of ‘critically analyse’ and ‘critically evaluate’

To critically analyse is to examine a subject in methodical detail in order to interpret/explain the subject where the candidate has used a range of reliable and valid sources of information to inform the analysis. A critical analysis does not require any form of judgement (e.g. a recommendation or proposal).

To critically evaluate is to form a judgement about a subject where the candidate has used a range of reliable and valid sources of information to inform the judgement and the analysis which supports this. A critical evaluation does require a candidate to reach an informed judgement (e.g. a suggestion, recommendation or finding).

Chartered Competence 1a – Budgeting and Cost Control

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

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.

Assessment criteria	Details
TK1.1 Critically analyse the different types of estimates and costs incurred within a typical project.	This involves examining different types of estimates and costs in detail, being able to explain their benefits and drawbacks, in what context they would be used, and how any drawbacks could be compensated for. Cost types, such as direct, indirect, variable, fixed, sunk, one-off and recurring, and cost categories, such as people, equipment, materials, and other, such as legal services. You should be able to define these cost types and categories, know how to differentiate between them, and be able to recognise and give examples of all of them. Consider why each cost type and category might be challenging to estimate and ways you can validate them.

Assessment criteria	Details
	Estimating techniques, such as bottom-up, top-down, analogous, parametric, analytical and Rough Order of Magnitude. You should be able to explain how to carry out these techniques, and identify when each of them would or would not be appropriate for a project. Consider the benefits and drawbacks of each technique, and what characteristics of project context would influence which estimating technique to use e.g. the project stage or the budget available.
TK1.2 Critically evaluate what needs to be considered when establishing a budget.	This means analysing a range of factors and forming a judgement about their role and importance when creating a budget. You should be able to explain a range of factors, such as the prioritisation of project deliverables, resource requirements, types of costs, funding arrangements, and accounting for risks and their contingencies, and how these impact the establishment of a budget. Consider the techniques involved in establishing a budget, including estimating techniques (such as top-down and bottom-up), the use of a cost breakdown structure, and monitoring and control practices, such as variance analysis and cost forecasting.

Assessment criteria	Details
TK1.3 Critically evaluate the importance of establishing a baseline for reporting upon and refining a budget.	This involves understanding the purpose and benefits of a baseline for reporting upon and refining a budget. You should be able to explain the role of a baseline in tracking and comparing actual against expected costs, identifying any deviations, and implementing corrective actions. You should be able to justify the purpose and benefit of establishing a baseline, such as explaining how it supports the ongoing ability to pay the bills, ensures there are no surprises, shows that the project's success criteria are still achievable, prevents the build-up of liabilities and disputes, and ultimately supports effective decision making. Consider how a baseline can be set with techniques such as using historical data, information from other ongoing projects, expert judgement and market research. Consider how a baseline can be refined through techniques such as change control.
TK1.4 Critically analyse how funding can be allocated throughout a typical project.	This means analysing different financing methods and funding sources, being able to explain their drawbacks and benefits, in what context they would be used, and how any drawbacks could be compensated for. You should be able to explain how to develop a funding plan, considering the sources of funding, such as opex or capex, government funding, charitable grants etc; various cost categories; the phases of a typical project; and ways in which the project could be funded e.g. lump sum, released on set dates, or released upon successful delivery of previous phase or deliverables. Consider what funding constraints there may be, how to analyse financial feasibility, and how to optimise

Assessment criteria	Details
	resource allocation balanced with the project objectives and financial sustainability. You should be able to explain how governance is implemented to manage the funding, including the importance of cash flow forecasting and any funding limitations.
TK1.5 Critically evaluate different monitoring and reporting techniques in relation to financial performance.	This involves analysing different techniques and forming a judgement about their role in financial performance. Consider monitoring and reporting techniques, such as return on investment (ROI), cost performance index (CPI), balance sheets, cash flow statements, variance analysis and forecasting. You should be able to analyse and interpret financial data, identify trends and how you can best use that data to communicate financial performance and manage risk.
TK1.6 Critically analyse the need to close all project finances.	This means being able to explain the importance of closing project finances and the steps involved in doing so. Consider the different financial closure activities, such as reconciling accounts, verifying expenses, closing contracts, final financial reporting and audit procedures. You should be able to explain the consequences of not properly closing all project finances and the importance of meeting organisational and legal obligations.

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.

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.

Assessment criteria	Details
TK1.1 Critically evaluate the governance rules for investment appraisal.	This means understanding how these rules are applied to investment decisions and their impact on the appraisal and approval of investments. You should be familiar with various investment evaluation methods, such as payback period, net present value (NPV), and internal rate of return (IRR). You should also be able to explain how to assess and manage risk in investment decisions and apply discounting techniques to assess the financial viability of projects. Consider how the nature of the organisation might influence governance decisions, for example, whether it is more entrepreneurial or bureaucratic. Consider how external governance may impact how investment decisions are governed, for example, the constraints and requirements that may be imposed by regulators, banks, financiers and government.
TK1.2 Critically analyse ways in which organisations might release project funding.	This means understanding funding models and release mechanisms, such as milestone-based funding, staged funding, or agile funding approaches and their advantages and disadvantages. You should be familiar with funding sources, such as equity, debt, or grants, and be able to explain how to assess funding requirements based on project phases.

Assessment criteria	Details
	You should be able to explain how to develop funding release plans, monitor funding utilisation, and manage funding risks to ensure timely and adequate financial support for projects.
TK1.3 Critically evaluate the characteristics of a consistent approach to estimating.	This means being able to explain estimating principles and techniques and their suitability and limitations in different contexts You should be able to explain standard estimating methods, such as analogous, parametric, and bottom-up estimating. Consider project-specific factors, such as complexity, risk, and uncertainty, in the estimating process. Consider how to improve estimating models, using historical data, conducting sensitivity analysis, and refining estimates based on lessons learned and feedback.
TK1.4 Critically evaluate the range of metrics which can determine the value of a project to an organisation.	This means being able to explain the metrics that can be used including key performance indicators (KPIs), return on investment (ROI), net present value (NPV), internal rate of return (IRR), and payback period and assessing their relevance, strengths and limitations in determining project value. You should be able to explain how to identify and prioritise metrics based on organisational goals, stakeholder needs and project objectives to support investment decisions. Consider the role of benefits management and a viable business case in assessing the value of a project to an organisation.
TK1.5 Critically analyse the information expected to be available for financial reviews.	This means being able to explain financial reporting requirements and how the use of financial statements such as income statements, balance

Assessment criteria	Details
	sheets and cash flow statements can support financial reviews. You should be able to explain how to assess profitability, liquidity, and solvency using financial ratios, carry out variance analysis, budget-to-actual comparisons, interpret financial trends and make informed recommendations based on the outcomes of financial reviews.
TK1.6 Critically evaluate tools and techniques available to monitor and analyse the financial performance of a project.	This means being able to explain how financial management and project management tools are used to monitor performance and considering their suitability and effectiveness in different contexts. You should be able to explain financial performance indicators, trend analysis, forecasting, and cost variance analysis and be able to interpret these to assess the impact of financial performance on project objectives. Consider use of financial data to make informed decisions and implement corrective actions.

Chartered Competence 2a – Change Control

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

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.

Assessment criteria	Detail
TK1.1 Critically evaluate the importance of the inclusion of a change control process within a project governance structure.	This means being able to justify the importance through an explanation of the purpose and benefits of a change control process, and the consequences of not having one. You should be able to explain the different steps of a change control process, and the importance of stakeholder communication and the documentation requirements within change control. Consider the benefits of including a change control process within governance, the challenges of doing so, and the consequences of an inadequate or missing change control process.

Assessment criteria	Detail
TK1.2 Critically analyse ways of capturing <u>and</u> recording change requests.	This means being able to explain the different processes, templates and systems available – their benefits and challenges, how those challenges could be overcome, and the context in which they would be most appropriate. You should be familiar with the information that needs to be captured in a change request template, and what is important to consider when recording and tracking change requests, including documentation and traceability. Consider how change requests are categorised, impact assessed and prioritised.
TK 1.3 Critically evaluate techniques to determine the high-level impact of a proposed change.	This means explaining different impact assessment methods, their benefits and drawbacks, and being able to justify or recommend which method would be appropriate in different situations. You should be able to explain different methods of assessing the consequences of a potential change, such as impact matrices, risk assessment, and stakeholder analysis. Consider what may be impacted by a proposed change and how, such as the high-level business case, costs and benefits.

Assessment criteria	Detail
TK1.4 Critically evaluate ways to justify whether a change should be approved, rejected, or deferred.	This involves explaining why different recommendations would be reached, with reference to the outcomes of impact assessments. You should be able to explain techniques such as cost-benefit analysis and risk assessment, and how their results would lead to a recommendation to accept, reject or defer a change request. Consider the evaluation criteria by which the change would be assessed, such as the impact on the business case, budget, benefits, scope, success criteria, quality, risks, resources, schedule and dependencies. You should be able to weigh the pros and cons of different change options, assessing them against the success criteria set out in the business case and whether the skills and resources needed to deliver the change are available. Consider how to provide reasoned justifications for approving, rejecting or deferring change requests, based on project constraints and priorities.

Assessment criteria	Detail
TK1.5 Critically analyse the purpose of communicating the outcomes of evaluated changes.	This means being able to explain the reasons for doing so, and how that communication contributes to project success. Consider the importance of transparency and managing expectations in engaging with stakeholders and what information should be included in a change communication plan. You should be able to clearly articulate the reasons behind the decision to approve, reject or defer a change, as appropriate for the audience, and how any resistance or concerns can be managed. Consider the role of project documentation once a change request has been evaluated and a decision made, and how that supports clarity for the project team, avoids confusion and inefficiency, and allows project progress to be appropriately measured.

Assessment criteria	Detail
TK1.6 Critically analyse the steps to applying an approved change.	This means being able to explain each of the steps and their purpose, along with any factors that should be considered. You should be able to explain what's involved in a change implementation plan – communicating the decision to stakeholders, adjusting project plans including budget, schedule and work breakdown structures, logging any lessons from the change, updating the project documentation, and monitoring the progress of the implementation. Consider strategies for stakeholder engagement, any further impact assessment, such as any links or dependencies to other projects, and any change testing and validation that may be required.
TK1.7 Critically analyse patterns of change to inform trend analysis.	This involves being able to explain the data analysis techniques that can be used to identify trends, and how those trends can inform decision making and learn lessons for the future. You should be able to explain data analysis techniques, such as regression analysis, factor analysis and time series analysis. Consider recurring types of change and common triggers across different projects and over time, and what they may indicate for a specific project or programme, or whether improvements are needed at an organisational level.

Chartered Competence 2b – Conflict Resolution

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

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.

Assessment criteria	Details
TK1.1 Critically analyse different ways to identify conflict.	This means being able to explain different identification techniques, their benefits and drawbacks, and when would be appropriate to use them. You should be able to explain conflict identification techniques, such as stakeholder analysis, issue tracking and feedback mechanisms. Consider how both overt and subtle signs of conflict within a project environment can be identified.
TK1.2 Critically analyse a variety of different indicators of conflict.	This means being able to explain the range of ways that conflict can appear in project environments. Consider both explicit and implicit signs of conflict, such as increased tension, communication breakdowns, resistance, or frequent disagreements. You should be able to explain how to identify conflict triggers, escalation patterns and underlying root causes.

Assessment criteria	Details
TK1.3 Critically evaluate the ways conflict resolution models can be used.	This means being able to explain the benefits, along with any drawbacks that should be considered, and be able to judge when those models should and shouldn't be used. You should be able to explain different conflict resolution models, such as the Thomas-Kilmann Conflict Mode Instrument, Graduated and Reciprocated Initiatives in Tension-Reduction (GRIT) and the Interest-Based Relational Approach. Consider the context that would make each model most appropriate, such as specific project environments, stakeholder dynamics, degree of conflict and risk to the project deliverables.
TK1.4 Critically analyse the various sources available to help resolve conflict.	This means being able to identify those sources, what help they can provide and justify which sources would be best to use in which situation. You should be able to explain how internal and external sources can help to resolve conflict, such as mediation services, conflict resolution experts, team facilitators and organisational policies and procedures. Consider what is best practice for conflict resolution, and how to assess the suitability of different sources based on the nature and complexity of conflicts encountered in project environments.

Assessment criteria	Details
TK1.5 Critically evaluate indicators that may help to confirm the success of conflict resolution measures.	This means being able to identify those indicators and what they indicate regarding the success of the conflict resolution measures. You should be able to explain indicators of success, such as improved communication, restored collaboration, decreased tension, or positive behavioural changes. Consider the effectiveness of evaluation processes that can be used post-resolution, such as conducting post-resolution assessments, collecting feedback, and utilising data, to assess both short and long-term success on project outcomes and stakeholder satisfaction.
TK1.6 Critically evaluate the techniques that are available to facilitate conflict resolution.	This means being able to explain those techniques, their benefits and drawbacks, how those drawbacks can be overcome, and when they would and wouldn't be appropriate to use. You should be able to explain techniques such as active listening, effective communication, facilitation, negotiation, mediation and problem-solving. Consider when those techniques should be used, based on the nature, dynamics and context of conflicts.

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.

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.

Assessment criteria	Details
TK1.1 Critically analyse the types of processes that could be put in place to effectively govern a project.	This means being able to explain a variety of processes and the ways in which they can support governance, their benefits and any drawbacks. You should be able to explain the role of processes in establishing effective project governance, such as creating an integrated plan, RACI charts, change control, creating a project charter, and budgeting and cost control. Consider how accountability and control are critical in effective project governance.

Assessment criteria	Details
TK1.2 Critically evaluate the interrelationships between project governance <u>and</u> organisational governance.	This means being able to explain how they impact each other, and making a justified recommendation on how best to align project with organisational governance. You should be able to explain how project governance frameworks, such as PRINCE2, APM and <i>the Project Management Body of Knowledge</i> (PMBOK), align with organisational governance principles, such as compliance, risk management and strategic alignment. Consider how the project and organisational governance should be co-ordinated, in order to ensure clarity, coherence and consistency in approach.
TK1.3 Critically analyse the effect of organisational culture <u>and</u> working practices on a project's governance structure.	This means being able to explain the ways in which they would impact the governance and how any misalignment could be managed to support project success. You should be able to explain how organisational culture can influence decision-making, communication and stakeholder engagement within a project. Consider how misalignment or incompatibility between project governance requirements and organisational practices can be identified and assessed. You should be able to explain how to adapt project governance structures to fit the organisational culture and working practices.

Assessment criteria	Details
TK1.4 Critically analyse the various levels of ownership within organisational governance and project governance structures.	This means being able to explain the typical roles and responsibilities, the level of decision making and escalation routes, and how ownership is shared and allocated between project and organisational structures. You should be able to explain where accountability and decision-making authority sits within both project and organisational governance structures, and how escalation and approval processes are designed for clear accountability. Consider hierarchy, roles and responsibilities within governance frameworks, and how organisational and project ownership differ and interact with each other. You should be able to explain the importance of aligning project governance with organisational governance to ensure effective decision-making, risk management and overall project success.

Assessment criteria	Details
TK1.5 Critically analyse ways to help maintain confidence in the governance structure.	This means being able to explain the importance of the governance structure in supporting the overall project success and how best to communicate that importance. You should be able to explain governance best practices, such as clarity, transparency and accountability in communication and reporting, and their link to critical factors in project success, such as stakeholder engagement, building trust, establishing quality standards and allowing timely issue resolution. Consider how governance policies can be best established to ensure compliance and address any conflicts of interest, and how to foster trust and build confidence in the governance structure through open and collaborative practices.

Chartered Competence 3b – Reviews

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

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.

Assessment criteria	Details
TK1.1 Critically analyse factors that need to be evaluated when establishing a schedule of project reviews.	This means being able to identify and explain a range of factors, and why they are important when building a review schedule. Consider factors such as project milestones, deliverables, timeline, critical paths, dependencies, the data each review needs and organisational governance requirements. You should be able to explain how resource availability, project complexity and stakeholder availability impacts the schedule of project reviews. Consider how and why a review schedule might need to be adjusted based on project progress and evolving requirements.

Assessment criteria	Details
TK1.2 Critically evaluate how to obtain relevant sources of data to inform reviews.	This means being able to explain data collection methods and information sources, their benefits and drawbacks, how those drawbacks might be managed, and in what context they would be appropriate. Consider techniques, such as document analysis, data sampling, interviews and surveys, and sources of data, such as project teams, key stakeholders, project documentation, past projects and BAU. You should be able to identify key data contributors, how to establish data collection protocols, and how to ensure data accuracy and completeness. Consider how to gather, process, analyse and utilise data to ensure effective project reviews and support decision making.
TK1.3 Critically evaluate the purpose of aligning reviews with governance processes.	This means being able to explain the reasons for doing so, the benefits that alignment delivers, and the consequences of not doing so. You should be able to explain the relationship between project reviews and governance frameworks, such as the co-ordination of funding release with project demands, adherence to regulatory or legal requirements, the project life cycle, governance milestones and reporting requirements. Consider how reviews can be leveraged to inform governance-related decisions and actions, such as approval to release funds, or progress to the next phase of the project.

Assessment criteria	Details
TK1.4 Critically evaluate ways of reporting and responding to project deviations.	This means being able to explain those ways, their benefits and drawbacks, and justify when would and would not be appropriate to use them. You should be able to explain the use of techniques, such as monitoring the project progress, variance analysis, change control, root cause analysis and issue management, to report and respond to project deviations. Consider how to identify and analyse project deviations, communicate them effectively and propose corrective actions, whilst minimising adverse impact on project success. Consider what should be reported about the deviation, such as impact on key project success criteria, options to resolve, reasons for the deviation and lessons on how to avoid deviation in the future.

Assessment criteria	Details
TK1.5 Critically analyse how stakeholders can be involved in the review outcomes.	This involves being able to explain the role of different stakeholders, why they need to be involved and how to manage their involvement. You should be able to explain how to identify, engage and work with stakeholders to inform the reviews and be part of implementing the review outcomes. Consider techniques such as stakeholder analysis to identify who needs to be involved and in what way, different feedback collection methods and communication methods. You should be able to select techniques depending upon the project context, the type of review, and the stakeholders' interest, influence and expertise. Consider how to manage stakeholder expectations, facilitate discussions and leverage insights to improve project outcomes, as well as the importance of transparency and clarity in communicating review outcomes.

Assessment criteria	Details
TK1.6 Critically evaluate actions necessary for the re-planning of a project in the event of deviations.	This means being able to explain the actions, why they are required and how they support project success and the consequences of not implementing those actions. You should be able to explain the role of impact analysis, resource reallocation, scope adjustments and schedule adjustments in responding to project deviations. Consider how to identify the root causes of deviations in order to take proactive action to resolve and support re-planning. You should be able to explain the steps needed to re-plan the project, including the involvement of key stakeholders, updating the project documentation, communicating the changes to reassure and re-build confidence, and then executing the revised plan, to mitigate the impact of deviations and support project success.

Assessment criteria	Details
TK1.7 Critically evaluate why planned reviews might need to be changed.	This involves being able to explain the reasons for doing so and justifying why those reasons would require a change to planned reviews. You should be able to explain how the schedule of reviews could be impacted by changes such as project scope changes, shifting organisational priorities and unforeseen circumstances and issues. Consider how such changes could impact the review objectives, deliverables and schedule, as well as the stakeholders involved in the review. You should be able to explain the importance of managing stakeholder expectations and how to effectively communicate the need for changes to ensure the continued effectiveness and relevance of reviews.

Assessment criteria	Details
TK1.8 Critically evaluate how reviews might impact the business case and the wider organisation.	This means being able to explain and justify those impacts, with reference to the review outcomes and decisions. Consider the relationship between project reviews and business objectives, and how review findings can be evaluated for their impact on the wider organisation. You should be able to explain how reviews of benefits realisation, strategic alignment and cost-benefit analysis can have consequences for the project's business case, such as project viability and scope, and for the wider organisation, such as strategic goals, required resources and co-ordination of funding release. Consider the justifications for recommending adjustments to the business case, and the need to align project outcomes with the broader objectives of the organisation.

Chartered Competence 4a – Integrated Planning

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

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.

Assessment criteria	Details
TK1.1 Critically evaluate the choices to be made when choosing the size, structure, and content of an integrated plan.	This means being able to explain the factors that would influence the choices, and how to justify those choices. Consider factors such as project management methodology, organisational governance requirements, project complexity, project risk, stakeholder requirements and resource availability. You should be able to explain how to create a comprehensive plan that includes key deliverables, milestones, dependencies, and resource allocation. Consider how the integrated plan should be tailored to meet the needs of the project and organisation, balancing flexibility with the need for structure.

Assessment criteria	Details
TK1.2 Critically evaluate the purpose and importance of an integrated plan.	This means being able to explain the purpose and justify the importance, with reference to project management principles and the role of planning in project success. You should be able to explain the benefits of an integrated plan, such as supporting communication, ensuring coordination, setting the baseline, minimising confusion and conflicts, supporting efficiencies and aligning project activities. Consider how an integrated plan supports effective project execution, monitoring and control.
TK 1.3 Critically analyse the typical components of an integrated plan.	This means being able to explain the details of the typical components, their interdependencies, and how the components support project success. You should be able to explain the typical components in detail and why they are needed to deliver the project successfully. Consider benefits, scope, schedule, resources, budget, delivery logistics and management strategies, including quality, risk, issues, communication and project controls. You should be able to identify and explain the interdependencies among the components, for example, the relationship between the project phases and the funding drawdowns. Consider how organisational governance and project management methodology would impact the typical components.

Assessment criteria	Details
TK1.4 Critically evaluate techniques to monitor an integrated plan.	This means being able to explain the techniques, their benefits and drawbacks, how those drawbacks could be managed, and ultimately be able to justify what technique to use in different contexts. Consider techniques such as progress tracking, milestone analysis, earned value management and performance reporting. Consider how deviations from the plan are identified and assessed, and what corrective actions need to be taken.
TK1.5 Critically evaluate the different elements used when updating an integrated plan.	This involves being able to explain the elements involved in updating an integrated plan, considering their relative importance and wider impact on the project and make a justified recommendation based on that evaluation. Consider elements such as scope changes, schedule updates, resource adjustments, risk mitigation and stakeholder communication. You should be able to identify and assess the impact of changes, analyse dependencies and update the plan accordingly. Consider how to effectively manage plan updates to maintain alignment with project objectives, and how to communicate changes to stakeholders while minimising disruptions to the project.

Chartered Competence 4b – Schedule Management

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

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.

Assessment criteria	Details
TK1.1 Critically analyse key planning considerations when creating a schedule.	This involves being able to explain the considerations, why they are important and how they contribute to successful project execution. You should be able to explain how to develop realistic and achievable schedules, identify and mitigate scheduling risks, optimise resource allocation, balance project constraints and effectively communicate the schedule to stakeholders. Consider factors such as task dependencies, resource availability, critical path analysis and schedule constraints.

Assessment criteria	Details
TK1.2 Critically evaluate the impact of internal <u>and</u> external schedule dependencies on a project.	This means being able to explain the impacts of the dependencies, and recommend how to mitigate those impacts to support successful delivery. You should be able to explain techniques such as network diagramming, critical path analysis and stakeholder coordination. Consider how to identify and analyse internal dependencies within the project and external dependencies with other projects, activities and stakeholders. You should be able to explain how to manage and mitigate schedule dependencies, communicate and coordinate with relevant parties and ensure project timelines are aligned for successful delivery.
TK1.3 Critically evaluate project planning techniques.	This means being able to explain different project planning techniques, their benefits and drawbacks and justify in what context they would be suitable to use. You should be able to explain techniques such as work breakdown structure (WBS), Gantt charts, critical path methods (CPM), and resource allocation. Consider how to identify project dependencies, and how to effectively organise and sequence project activities, including the use of project and task buffers and contingencies generally. You should be able to select and apply appropriate planning techniques based on project characteristics and objectives and project management methodology.

Assessment criteria	Details
TK1.4 Critically evaluate schedule estimating techniques.	This means being able to explain different schedule estimating techniques, their benefits and drawbacks and justify in what context they would be suitable to use. You should be able to explain techniques such as analogous estimating, parametric estimating and three-point estimating. Consider how to apply these techniques to estimate task durations, account for uncertainties and create realistic project schedules. Also consider how to validate the accuracy of schedule estimates through monitoring and control as the project progresses.
TK1.5 Critically evaluate the need for an approved baseline schedule.	This means being able to explain the purpose and benefits of an approved baseline schedule, and justify its importance in supporting effective project control. You should be able to explain how an approved baseline schedule supports performance measurement, progress tracking and change control. Consider how an approved baseline schedule serves as a reference point and single source of truth for the project. Also consider how deviations can be tracked and how any necessary adjustments can be implemented whilst adhering to established change control processes.

Assessment criteria	Details
TK1.6 Critically analyse the ways to update the schedule.	This means being able to explain ways to update the schedule, in what context those ways would be appropriate, and how to manage the updates to ensure the project remains on track towards its objectives. You should be able to explain methods such as critical path analysis, resource levelling and schedule compression. Consider how to identify schedule deviations, assess their impact and implement necessary updates to reflect changes in project scope, resources, or constraints. Also consider how to effectively communicate schedule updates and manage stakeholder expectations to support successful project delivery.
TK1.7 Critically evaluate the impact of changes on an approved baseline schedule.	This involves being able to explain how to identify and analyse the impact of changes, and justify ways to mitigate and manage the impact, in order to maintain alignment between the baseline schedule and project objectives. You should be able to explain methods such as schedule impact analysis, critical path evaluation and resource reallocation. Consider how to assess the ripple effects of changes on the baseline schedule, identify potential schedule delays or conflicts and propose mitigation strategies.

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.

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.

Assessment criteria	Details
TK1.1 Critically evaluate different leadership styles.	This means being able to explain different leadership styles, their characteristics, strengths and potential drawbacks and justify a recommendation on which style to use in which contexts. You should be able to explain leadership styles, such as autocratic, democratic, delegative transformational and transactional. Consider how leadership styles should be adapted based on the situational context, with reference to Hersey and Blanchard’s situational leadership and Adair’s action-centred leadership.

Assessment criteria	Details
TK1.2 Critically analyse the behaviours <u>and</u> interpersonal skills that underpin effective leadership.	This means being able to explain the behaviours and interpersonal skills that are required for effective leadership, why they are important and how their absence can lead to ineffective leadership. You should be able to explain skills such as communication, empathy, decision-making and conflict resolution. Consider the importance of self-awareness, emotional intelligence, adaptability and the ability to build and maintain relationships. You should be able to explain how the behaviours and interpersonal skills underpin effective leadership, by showing their link to setting a vision, clear decision making, motivating teams, resolving conflicts and fostering a positive work environment.
TK1.3 Critically evaluate how understanding a project environment affects the leadership style.	This means being able to explain the contextual factors that influence leadership styles, and be able to justify a choice why different styles are appropriate in different environments. You should be able to explain factors such as project complexity, team dynamics, stakeholder expectations, organisational culture and physical locations, (co-location etc). Consider situational leadership and how leadership styles can be adapted based on the environment, balancing directive and supportive behaviours accordingly.

Assessment criteria	Details
TK1.4 Critically analyse the structure and content of a project vision and its importance.	This means being able to explain how a project vision is structured and what it should include in order for it to be clear and compelling, why a project vision is important to the success of a project and the negative impacts of a poorly defined and communicated project vision. You should be able to explain the different components of a project vision statement, such as the overall purpose, desired future state, the expected impact and any guiding principles that shape the vision and techniques that can support its creation, such as strategic and stakeholder analysis, scenario planning and use of vision statement templates. Consider the role of a project vision in providing direction, motivating team members, engaging stakeholders and guiding decision-making.

Assessment criteria	Details
TK1.5 Critically evaluate methods for addressing challenges within a project environment.	This means being able to explain the methods that can identify, analyse and address challenges within a project environment, and be able to justify which problem-solving method is appropriate in different situations. Consider challenges such as scope changes, resource constraints, and schedule delays, and the effective mitigation strategies, contingency plans, and alternative solutions, for those challenges. You should be able to explain problem-solving methods, such as root-cause analysis, pareto analysis, 5 Whys and 2 Hows, impact and effort matrix and systems thinking. Consider how to balance addressing project challenges with managing risks and maintaining project progress despite obstacles.

Chartered Competence 5b – Team Management

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

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.

Assessment criteria	Details
TK1.1. Critically analyse the value of setting a project vision and how the maturity of a team can affect its delivery.	This means being able to explain how a project vision can support delivery, the benefits of having one, such as providing a clear direction and aligning team efforts, and the negative impacts of not having one. You should be able to explain the stages of team maturity, such as forming, storming, norming, performing and adjourning. Consider the way that team maturity can impact the delivery of the project vision, including collaboration, communication and decision-making. Consider different ways to establish project visions, manage team dynamics and how to adapt your approach based on the maturity of the team.

Assessment criteria	Details
TK1.2 Critically analyse the importance of effective communication to facilitate ownership of delegated tasks.	This means being able to explain the importance and benefits of communicating effectively when delegating, and the consequences of ineffective communication in facilitating ownership. You should be able to explain how effective communication builds trust, clarifies responsibilities, fosters accountability and empowers team members. Consider how clarity, conciseness, setting expectations, and providing necessary resources and support helps to facilitate ownership of delegated tasks.
TK1.3 Critically evaluate the challenges that may occur when working with remote teams	This means being able to explain the challenges, when they may occur and why, and recommend how those challenges can be mitigated to ensure project success. Consider the dynamics and obstacles associated with remote teams, such as time zone differences, cultural diversity and technology limitations. You should be able to explain techniques to address challenges, ensuring effective communication, collaboration, coordination and team cohesion in a remote setting.

Assessment criteria	Details
TK1.4 Critically evaluate the way in which individuals <u>and</u> team needs to correlate.	This means being able to explain the correlation, why it occurs and recommend how it can be managed to meet both individual and team needs. You should be able to explain the relationship between individual and team dynamics in a project environment. Consider how to effectively manage and align individual and team needs to optimise performance and project outcomes. You should be able to explain techniques for identifying, assessing and addressing individual needs, such as skills, motivation and work preferences, and how to balance those individual needs with team goals, collaboration and cohesion.
TK1.5 Critically evaluate ways of developing <u>and</u> supporting individuals and/or teams.	This means being able to explain the options for development and support, their benefits and drawbacks, and be able to recommend which option would be suitable for different individuals, teams and project environments in order to enhance performance and achieve project objectives. You should be able to explain techniques to assess skills gaps; training, coaching and mentorship; team building strategies; how to promote continuous learning; and succession planning. Consider how to create a supportive and inclusive team environment, foster collaboration and address conflicts.

Assessment criteria	Details
TK1.6 Critically analyse techniques for performance monitoring <u>and</u> how these are affected by changes in team dynamics.	This means being able to explain techniques, their benefits and drawbacks, and how those drawbacks could be mitigated. Consider techniques such as key performance indicators (KPIs), regular check-ins, performance reviews, 360 degree feedback reviews, and SMART objective setting, for monitoring both individual and team performance. You should be able to explain how performance monitoring would be affected by changes in team dynamics, such as team composition, roles and responsibilities. Consider how performance monitoring can be adjusted to accommodate evolving team dynamics to monitor and address any performance issues in a dynamic team environment.

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.

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.

Assessment criteria	Details
TK1.1 Critically analyse ways to identify risks and capture issues.	This means being able to explain the benefits and any drawbacks of options for identifying risks and capturing issues, along with the context in which those options would be most appropriate. You should be able to explain risk identification techniques, such as brainstorming sessions, risk registers, pre-mortems, SWOT analysis, assumption analysis, nominal group technique and Delphi technique. You should also be able to explain ways to capture issues effectively, such as a RAID or Issue Log, Issue Report Template, Lessons Log and automated tracking systems. Consider how identifying risks and capturing issues supports successful project delivery.

Assessment criteria	Details
TK1.2 Critically evaluate techniques to assess risk.	This means being able to explain techniques, their benefits and drawbacks, and be able to justify what technique you would recommend in different contexts. You should be able to explain risk assessment tools, such as tornado diagrams, sensitivity analysis, decision trees and the Monte Carlo techniques, and techniques such as risk probability and impact analysis, and risk prioritisation based on potential impact on project objectives. Consider the differences between quantitative and qualitative analysis, and be able to recommend when and why each should be used.
TK1.3 Critically analyse the types of impact risks <u>and</u> issues could have on project delivery.	This means being able to explain the impacts, how to prioritise risks and issues based on their impacts and how to communicate those impacts with the wider project team and organisation. Consider the different types of impact, such as business case, benefits, budget, schedule, scope, quality and stakeholder satisfaction. You should be able to explain the factors involved in the prioritisation of risks and issues, depending upon the project and organisational context. Consider how to communicate potential consequences, such as involvement of stakeholders in the assessment and prioritisation, using the governance process to escalate as appropriate, and the importance of clarity and transparency.

Assessment criteria	Details
TK1.4 Critically evaluate techniques to improve issue management through continuous improvement.	This means being able to explain continuous improvement techniques, their benefits and any drawbacks, and be able to justify when the techniques would be best used, depending upon the context. You should be able to explain continuous improvement methods, such as root cause analysis, corrective and preventive actions and lessons learned. Consider how to identify recurring issues, implement corrective measures and drive process improvements. You should be able to explain how to facilitate lessons learned sessions, track the effectiveness of improvement actions and promote a culture of learning and continuous improvement.
TK1.5 Critically evaluate the need for ongoing ownership of risks.	This means being able to explain what ownership means in risk management and justify why it is important throughout the project lifecycle. You should be able to explain the importance of assigning risk ownership, monitoring and reviewing risks and ensuring appropriate mitigation actions are taken. Consider how risk ownership changes throughout the project lifecycle and why is it needed at each stage.

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.

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.

Assessment criteria	Details
TK1.1 Critically evaluate the importance of stakeholder engagement.	This means being able to explain stakeholder engagement, and justify why it is important to successful project delivery. You should be able to explain the benefits of successful stakeholder engagement for different stakeholders, such as senior leaders, users, suppliers and project team, and the impacts where engagement is unsuccessful or not prioritised. Consider how stakeholder engagement impacts different aspects of project delivery, such as planning, risk and issue management, change management.

Assessment criteria	Details
TK1.2 Critically evaluate the ways to identify and analyse stakeholder interests and level of influence.	This means being able to explain the techniques, their benefits and drawbacks, how those drawbacks can be mitigated, and justify what techniques you would recommend in different project contexts. You should be able to explain identification techniques, such as brainstorming, review of published material, interviews and previous projects. You should be able to explain analysis techniques, such as power/interest matrices, influence/impact grids and empathy mapping.
TK1.3 Critically analyse the content of a typical communication plan.	This means being able to explain the purpose and importance of the plan's content in delivering project success. You should be able to explain components, such as stakeholder identification, communication objectives, message development, communication channels and frequency. Consider how those components support effective communication and ultimate successful project delivery, such as tailoring to stakeholder needs and aligning with the project context.

Assessment criteria	Details
TK1.4 Critically evaluate ways of monitoring the impact of stakeholder engagement.	This means being able to explain options for monitoring impact, their benefits and drawbacks, and in what context they would be appropriate to use. You should be able to explain ways to monitor engagement such as social media monitoring, sentiment analysis, surveys, interviews and focus groups, and what information they would provide about the impact of stakeholder engagement. Consider metrics that can be used, such as key performance indicators (KPIs) and the importance of continuous monitoring to track the impact of engagement.
TK1.5 Critically evaluate the range of methods <u>and</u> media available for project communications.	This involves being able to explain both methods and media, their purpose, benefits and any drawbacks, and justify what you would recommend to use in different contexts. You should be able to explain various communication methods and channels, such as meetings, emails, project management software, collaboration platforms, or video conferencing tools. Consider factors such as project size, project complexity, message complexity, message content and stakeholder preferences. You should be able to explain different examples of print and digital media, such as webpages, videos, newsletters, posters etc.

Assessment criteria	Details
TK1.6 Critically evaluate how stakeholders can provide feedback.	This means being able to explain methods for providing feedback, their benefits and drawbacks, and justify what methods you would recommend in different contexts. You should be able to explain how methods, such as surveys, interviews, focus groups and online feedback platforms, can be used to collect feedback. Consider how feedback mechanisms can be tailored to different stakeholder groups, and to what information you're aiming to collect. You should be able to explain how stakeholder feedback can be incorporated into project decision-making processes, the importance of both two-way communication and responsiveness to stakeholders' concerns.

Accountability and Complexity Assessment – Evaluation Standards

Assessment Method

- Any projects referenced within the presentation may be selected for assessment.
- Questions will be pre-selected by APM.
- Judgement per criterion: Evidenced / Partially Evidenced / Not Evidenced.
- Two questions for learning outcome (LO) A, with both evidence criteria (EC) needing to be evidenced.
- One question per LO for LOs B to E, evidencing one EC each.
- Six questions in total, and each question will be worth two marks.

A candidate **meets the complexity and accountability requirement** for APM ChPP status where:

- All learning outcomes (A–E) are assessed.
- Two criteria from Learning Outcome A to be assessed, one criterion each from Learning Outcome B–E to be assessed .
- Evidence demonstrates breadth, depth and sustained responsibility.

Learning Outcome A: Personal Accountability and Authority

A1 – Accountability for Outcomes

Criterion

The candidate demonstrates personal accountability for project, programme, or portfolio outcomes.

Assessment Coverage

- What were you personally accountable for?
- How were you held to account for delivery performance?
- What consequences arose from success or failure?

Evidence Required

- Named accountability (not collective or advisory).
- Direct linkage between candidate decisions and outcomes.
- Evidence of governance, reporting, or contractual responsibility.

A2 – Authority and Decision Structures

Criterion

The candidate exercised authority to make decisions affecting scope, cost, time, quality, or risk.

Assessment Coverage

- What decisions were you authorised to make?
- Describe a decision that materially affected delivery.
- What constraints existed on your authority?

Evidence Required

- Examples of autonomous or delegated decision-making.
- Decisions affected delivery trajectory or outcomes.
- Evidence of operating within formal governance structures.

Learning Outcome B: Management of Conflicting Objectives

B1 – Recognition of Competing Objectives

Criterion

The candidate recognised and articulated conflicting or competing objectives within the environment.

Assessment Coverage

- Which objectives were in conflict?
- Who owned these objectives?
- Why could they not all be achieved simultaneously?

Evidence Required

- At least two clearly incompatible objectives identified.
- Stakeholders linked to each objective.
- Conflict was material to delivery.

B2 – Trade-off and Prioritisation

Criterion

The candidate applied sound professional judgement to balance and resolve conflicting objectives in complex situations.

Assessment Coverage

- What trade-offs did you make?
- What criteria informed your decision?
- What was the impact of your choice?

Evidence Required

- Explicit prioritisation rationale.
- Evidence of compromise, escalation, or negotiation.
- Outcomes demonstrate intentional decision-making.

Learning Outcome C: Uncertainty, Risk and Ambiguity**C1 – Complexity and Ambiguity****Criterion**

The candidate operated in an environment with significant ambiguity or rapidly changing conditions.

Assessment Coverage

- What was unknown at the outset?
- What assumptions were later proved incorrect?
- What changed unexpectedly?
- What would you have done differently?

Evidence Required

- Evidence of emergent risks or changing context.
- Uncertainty affected plans or outcomes.
- Complexity exceeded routine project risk.

C2 –Level of Risk and Impact**Criterion**

The candidate actively managed high levels of risk where there would be significant impact to the organisation if the risk appeared.

Assessment Coverage

- Why was this a high-risk project?
- How did the risk profile of the project impact the decisions that you made?
- How did the risk profile impact your project approach?

Evidence Required

- Adjustments to strategy or plans.
- Evidence of adaptation to the risk profile of the project.

Learning Outcome D: Scale, Integration and Delivery Complexity**D1 – Multiple Work Packages or Projects**

Criterion

The candidate was responsible for multiple interrelated work packages, projects, or programme elements.

Assessment Coverage

- What discrete components were you responsible for?
- How were they structured?
- How did you track performance?

Evidence Required

- Clear evidence of multiple delivery components.
- Responsibility extended beyond a single deliverable.
- Oversight mechanisms described.

D2 – Integration and Dependency Management**Criterion**

The candidate managed dependencies and integration across work packages, projects and programmes.

Assessment Coverage

- What dependencies existed and why were they important to the overall project success?
- How did issues in one area affect others?
- How did you balance the achievement of one work package, project or programmes against another?

Evidence Required

- Explicit dependency management.
- Coordination decisions affected outcomes.
- Evidence of systems thinking.

Learning Outcome E: Stakeholder Interdependence and Complexity**E1 – Interdependent Stakeholders****Criterion**

The candidate operated with multiple interdependent stakeholders.

Assessment Coverage

- How were the stakeholders' interests interdependent?
- What risks arose from the interdependency?
- What opportunities arose from the interdependency?

Evidence Required

- Interdependencies clearly explained.
- How the interdependence influenced delivery outcomes.

E2 – Complexity of Stakeholder Management

Criterion

The candidate managed an interdependency of stakeholders, the absence of which would have had a significant impact to the project.

Assessment Coverage

- Describe an interdependent conflict or resistance you faced between stakeholders.
- How did the interdependencies impact your engagement strategy?

Evidence Required

- A significant conflict or resistance clearly explained.
- Active engagement and communication strategies.
- Demonstration of their interdependency management.

Professional Practice – Competences

Chartered Competence 1a – Budgeting and Cost Control

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

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice 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.

Chartered Competence 2a – Change Control

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

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.

You will need to demonstrate your choice 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.

Chartered Competence 2b – Conflict Resolution

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

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice 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.

Chartered Competence 3b – Reviews

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

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

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

Chartered Competence 4b – Schedule Management

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

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

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

Chartered Competence 5b – Team Management

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

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice 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.

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.

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

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

- PP1.1 Agreed the scope and responsibilities for assurance activities.
- PP1.2 Resourced assurance activities.
- PP1.3 Conducted assurance activities making recommendations for corrective action where required.
- PP1.4 Prioritised assurance activities.
- PP1.5 Provided advice, guidance and support in the implementation of recommendations.
- PP1.6 Maintained effective communication with stakeholders to address concerns and report on corrective actions.
- PP1.7 Analysed patterns of change to identify trends to improve current or future project performance.

Chartered Competence 9 – Benefits Management

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

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

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice 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.

Chartered Competence 11 – Capability Development

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

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.

You will need to demonstrate your choice 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.

Chartered Competence 12 – Contract Management

The ability to monitor and manage supplier performance.

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.

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

- PP1.1 Monitored client performance against their agreed contractual obligations.
- PP1.2 Complied with your organisational procedures associated with contract management.
- PP1.3 Monitored the supplier performance against their agreed contractual obligations.
- PP1.4 Managed supplier relationships.
- PP1.5 Took appropriate action where necessary to ensure all parties comply with the terms of a contract.
- PP1.6 Managed contract variances to address any potential contractual items.
- PP1.7 Closed a contract and reported outcomes to stakeholders.

Chartered Competence 13 – Diversity and Inclusion

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

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.

You will need to demonstrate your choice 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.

Chartered Competence 14 – Life Cycles

The ability to structure and organise projects.

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.

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

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

Chartered Competence 15 – Portfolio Shaping

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

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.

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

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

Chartered Competence 16 – Procurement

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

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

You will need to demonstrate your choice 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.

Chartered Competence 17 – Quality Management

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

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.

You will need to demonstrate your choice 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.

Chartered Competence 18 – Requirements Management

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

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

- PP1.1 Established resource requirements for a project.
- PP1.2 Included consideration of other projects when planning the allocation of resources.
- PP1.3 Assessed the total resource capacity for the duration of the project.
- PP1.4 Capitalised on opportunities for sharing infrastructure and/or procurement efficiencies.
- PP1.5 Governed the direction of project activities through effective scheduling of phases, milestones and review points.
- PP1.6 Established reporting requirements for resource utilisation.
- PP1.7 Prepared and delivered progress reports to relevant stakeholders.

Chartered Competence 20 – Resource Management

The ability to acquire and deploy internal and external resources.

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.

You will need to demonstrate your choice 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.

Chartered Competence 21 – Solutions Development

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

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.

You will need to demonstrate your choice 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.

Chartered Competence 22 – Sustainability

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

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.

You will need to demonstrate your choice 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.

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.

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.

You will need to demonstrate your choice 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.

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.

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

You will need to demonstrate your choice of four of the following assessment criteria to show that you have:

- PP1.1 Identified how organisational context influenced ethics and compliance for a project.
- PP1.2 Reconciled organisational and professional codes of conduct to facilitate understanding and collaboration.
- PP1.3 Identified deviations from accepted ethical behaviours and responded in a professional way.
- PP1.4 Acted within the limits of your own competence and authority and responding where circumstances require escalation.
- PP1.5 Exploited opportunities to support continuing professional development.
- PP1.6 Encouraged and enforced a safe and effective working environment.
- PP1.7 Involved specialist, professional and/or legal resources for compliance or ethics escalation.
- PP1.8 Demonstrated integrity beyond the expectations of your role or authority.



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