



# Chartered Project Professional (ChPP) Application Guidance

*Helping you to understand, decide and prepare for  
the Chartered Project Professional (ChPP) standard*

THE **CHARTERED BODY** FOR  
PROJECT PROFESSION



Becoming a Chartered Project Professional (ChPP) will demonstrate your commitment to professional standards, continued professional development and ethical and professional conduct. It will provide assurance for your employer and clients and help raise the profile and value of project management as a professional practice.

This guidance will help you to decide when the time is right for you to apply and will help you to prepare for an application now or at a future date.

I hope that you will decide to make becoming a ChPP part of your career development journey and we look forward to welcoming you to a new community of project professionals.



**Debbie Dore**  
Chief executive officer

## Contents

- Page 3** Introduction
- Page 4** Why become chartered?
- Page 4** Are you ready for chartered?
- Page 6** The application process
- Page 9** Helping you to prepare
- Page 13** The interview
- Page 15** Other things to note
- Page 17** Appendix 1 – Professional practice assessment criteria
- Page 34** Appendix 2 – Technical knowledge assessment criteria

## Introduction

This guide sets out to help you do three things:

- Understand what being chartered means for you and the profession.
- Decide if becoming chartered is right for you now, or at a later date.
- Prepare your application.

If you are successful, you will join the Register of Chartered Project Professionals.

The chartered standard has been designed to be accessible, yet rigorous with different assessment routes according to qualifications, previous assessments and experience.



Wherever you see 'project management', this includes people working in project, programme or portfolio management, or in a key control or enabling function such as PMO.

## Why become chartered?

For APM and the profession it means	For you it means	For employers it means
<ul style="list-style-type: none"> <li>■ Enhanced status of project management</li> <li>■ Raised standards of practice</li> <li>■ Improved project outcomes</li> <li>■ Better public understanding and confidence in what we do</li> <li>■ Assurance and confidence for customers of project management services</li> <li>■ Opening the door to collaboration with other professions</li> </ul>	<ul style="list-style-type: none"> <li>■ Personal recognition from your peers in project management and other professions</li> <li>■ Enhanced CV to stand out in the job market</li> <li>■ A framework for the development of your career</li> <li>■ International recognition</li> <li>■ Assurance for clients of high standards and ethical practice</li> <li>■ Use of the post nominal ChPP</li> <li>■ Increased understanding, helping you to work more effectively</li> </ul>	<ul style="list-style-type: none"> <li>■ Proof of a high standard of practice and ethical standards</li> <li>■ Attracting the best talent by actively supporting chartered</li> <li>■ A competitive edge</li> <li>■ A ready-made framework for developing your people</li> <li>■ Motivated team committed to continued professional development and ethics</li> <li>■ Increased status of project management in organisations/clients and the public</li> </ul>

## Are you ready for chartered?

- You are professionally active with a proven track record of delivering projects, programmes, portfolios or a key control or enabling function.
- These projects, programmes or portfolios exhibit characteristics of complexity.
- You have the required breadth of project experience to meet the requirements of ten mandatory and two elective competences.
- You have an advanced technical knowledge and are able to confidently evaluate and analyse theory of current practices and methods.
- You are committed to continuing professional development and an ethical way of working.

## Are you eligible?

You need to be 'professionally active'. This means:

- a) having a proven track record delivering projects, programmes, portfolios or a key control or enabling function; and
- b) having up-to-date knowledge of current practices and methods; and
- c) being actively involved in the project management profession.

If the evidence provided in your application is more than five years old, you will be directed to complete a currency statement which explains how you continue to meet points b) and c) above.

## What is being assessed?

The application process is designed to assess the following areas, so consider whether you can provide evidence of this now or if you need some more experience or learning first. There is more detail later on in these guidance notes about the competences that support these areas. You will need to show:

- **Technical knowledge:** advanced technical knowledge and understanding of how to deliver projects, programmes or portfolios taking into account many interacting factors and different approaches that could be taken.
- **Professional practice:** successful application of this knowledge to deliver projects, programmes or portfolios that involved:
  - Uncertainty or conflicting objectives.
  - High levels of unpredictability or risk.
  - Multiple work packages, projects or programmes.
  - Multiple interdependent stakeholders, possibly with competing interests.
- You will need to commit to professional ethics and show continuing professional development (CPD). You will also need two proposers who support your application.

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

The next section tells you how to provide the evidence required.



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



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



## The application process

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

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

- **Route 1:** for those who have a recognised assessment for technical knowledge.
- **Route 2:** for those who have a recognised assessment for technical knowledge and professional practice.
- **Route 3:** an experiential route for those who do not have a recognised assessment but do meet the eligibility criteria.

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



If you are applying without a recognised assessment you will be tested on your technical knowledge at interview. Make sure that you have prepared for this.

STAGE TWO Interview		
ROUTE 1	ROUTE 2	ROUTE 3
<p>Up to one hour face-to-face interview (two assessors)*</p> <ul style="list-style-type: none"> <li>Professional practice: validates your written submission.</li> <li>Ethics.</li> </ul>	<p>A phone interview (one assessor) of up to 30 minutes.</p> <ul style="list-style-type: none"> <li>CPD</li> <li>Ethics.</li> <li>Currency of mandatory competences.</li> </ul>	<p>Up to two hour face-to-face interview (two assessors)*</p> <ul style="list-style-type: none"> <li>Professional practice: validates your written submission.</li> <li>Technical knowledge: technical questioning to assess your breadth of knowledge.</li> <li>Ethics.</li> </ul>
<p>A panel meets periodically to confirm results and award chartered status.</p>		

\* It may be possible to arrange a Skype interview if you are unable to attend in person



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

- is at least at the required level for technical knowledge or technical knowledge and professional practice;
- is externally regulated by an approved body (such as Ofqual), or aligns to the quality requirements of ISO17024; and
- covers a minimum number of mandatory and elective competences.

You can find the current list of recognised assessments here: [apm.org.uk/chpp](http://apm.org.uk/chpp). You will need to upload your certificate when you apply.

For all recognised assessments that have a validity date, the certificate needs to be current during the full assessment cycle that an applicant applies under.

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

Find out more about APM's recognised assessment scheme on the APM website.



## Helping you to prepare

APM has commissioned a range of support services that are available to members and non-members. Find out more by visiting [apm.org.uk/chpp](http://apm.org.uk/chpp).

### Completing the form

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

#### Checklist

- Certificates from any recognised assessments
- Two proposers: name and contact information only
- Method of payment

#### If needed:

- Project overviews
- Evidence of competences
- Your CPD record

If you are already registered on the APM website you will need to log in to begin. If you are not already registered, it is quick and easy to do so. You will be asked to provide some basic information to complete the registration process.

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

### Personal information

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

### Recognised assessments

Select any recognised assessments from the drop-down list. This will determine the next steps of the application process. You will be directed automatically to the parts you need to fill in next. If you don't have a recognised assessment you will go to the written submission stage and technical knowledge will be tested at interview.

Be ready to upload any relevant certificates.

The current list of recognised assessments can be found here:  
[apm.org.uk/recognisedassessment](http://apm.org.uk/recognisedassessment).

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



Once you start the online application you can save it and come back so you don't need to do it all at once.



If your most recent assessment is more than five years old you will need to provide a statement showing how you have kept up to date with current practice and methods and been actively involved in the project management profession.



**If your most recent project, programme or portfolio is more than five years old you will need to provide a statement showing how you have kept up to date with current practice and methods and been actively involved in the project management profession.**

## Project experience

Unless you have a recognised assessment that includes professional practice, you will need to provide overviews of up to four projects, programmes or portfolios that give the contextual evidence for your professional practice assessment. These overviews will be referred to as your project experience throughout your application and you should only submit overviews that are used as evidence within the competence section. You will need to refer to all project experiences in the competence section, but you can only refer to one project per competence, so it is important to describe a project that will give you the best chance of meeting the relevant assessment criteria.

You must show what you were responsible/accountable for and show how the project, programme or portfolio demonstrated the following characteristics:

- uncertainty or conflicting objectives;
- high levels of unpredictability or risk;
- multiple work packages, projects or programmes;
- multiple interdependent stakeholders, possibly with competing interests.

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

## Competence selection and assessment

In this section you will show how you meet the competences. Most are mandatory but there are also some choices. You will need to spend some time thinking about the evidence you will need – don't rush it.

The elective selection provides the opportunity for those in specialist roles to demonstrate how they meet the chartered standard.

Mandatory	Nine competences Plus your choice of either budgeting and cost control OR financial management
Elective	Your choice of two from a list of 15
Total	12 competences

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



Write up your project overviews and competence statements offline so that you can spell check, word count and edit them easily. Then simply cut and paste them into the application system.

- Write your answers in the first person. "I did...."
- Avoid jargon and company acronyms – remember the assessors won't know your organisation so explain things as clearly as you can using plain English.
- Proofread your application. It may help to go back to it the next day with a fresh pair of eyes before submitting.
- Make sure your proposers are happy and know that they may be contacted.
- Avoid theoretical answers or repeating the competence statements and assessment criteria.

**IMPORTANT NOTE:** Each competence statement must relate to one project, programme or portfolio detailed in the project experience section. You can't refer to more than one project experience within a single competence. If an overview in your project experience section is not referenced in your competence section, please remove before submitting your application.

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

Each of your answers can be up to 250 words.




## Continuing Professional Development (CPD)



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

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

You will need to have completed 35 hours of CPD in the 12 months up to your application and confirm that you will maintain this every year. All CPD must meet the requirements of APM's CPD scheme which can be found here: [apm.org.uk/cpd](http://apm.org.uk/cpd).

 <p><b>APM</b> CONTINUING PROFESSIONAL DEVELOPMENT</p>	<p><b>CPD</b></p> <p>You will either have to upload your record or self-declare (see section above on the application process)</p> <p>APM will do an annual audit of a sample of ChPP CPD records.</p>
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You can use the APM CPD log, but this is not mandatory provided you meet the necessary requirements. This includes a statement on the areas you would like to develop further over the next 12 months.

### Your proposers

You must provide contact details for two proposers who can support your application. Proposers could be another project professional or your line manager but can't be a family member.

Your proposers should believe you are suitable for consideration for ChPP and be happy to confirm this if contacted by APM.

### Code of Professional Conduct and online directory

In this section you will be asked to confirm that you have read, understood and will abide by APM's Code of Professional Conduct: [apm.org.uk/codeofconduct](http://apm.org.uk/codeofconduct). This will demonstrate your commitment to the profession and ethical behaviour, and your willingness to support others.

You will also be asked if, subject to your application being successful, you would like your name to be published on the APM website.

## The interview

If your first stage application is successful, you will be invited to interview.

The interview is a mandatory part of the assessment process for all applicants. It is based on the information you provide in your application and will validate and explore your responses. See the earlier step-through of the application process on page eight to check what your interview will cover.

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

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

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

### Interview format

The interview format will take the form of a discussion. There are no trick questions and you should structure your responses to questions using 'I' not 'we' or 'the team'. The interviewers will be seeking to understand your evidence. Appendix 2 summarises the technical knowledge assessment criteria interviewers can select from.

### Route 1 interviews

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

- clarification questions on your project overviews (if applicable);
- clarification questions on your professionally active statement (if applicable);
- questions on six competence areas from your written submission (these areas are chosen by the assessors);
- questions on ethics;
- finally, if you have any additional evidence you would like to add to support your application – you have up to five minutes to provide this.



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



**You can find the technical knowledge assessment criteria in Appendix 2.**



### Route 2 interviews

Your interview will be conducted by one assessor and, as you already hold a recognised assessment for technical knowledge and professional practice the purpose of the interview is to explore currency, ethics and CPD. You will be asked:

- clarification questions on your professionally active statement (if applicable);
- clarification questions on your CPD submission (if applicable);
- questions on how the CPD you have undertaken relates to a selection of mandatory competences and/or examples, within the past five years, where you have used a selection of mandatory competences within your project management related activity;
- questions on ethics;
- finally, if you have any additional evidence you would like to add to support your application – you have up to five minutes to provide this.

### Route 3 interviews

Your interview will be conducted by two assessors and the purpose of the interview is to explore and validate your written submission as well as assess technical knowledge. You are expected to provide detailed and specific answers about actual events relating to evidence in your application with regards to professional practice. The technical knowledge questions are designed to assess your breadth of knowledge against the criteria and answers to these questions do not specifically have to relate to your own experience. You will be asked:

- clarification questions on your project overviews (if applicable);
- clarification questions on your professionally active statement (if applicable);
- questions on six competence areas from your written submission in relation to professional practice (these areas are chosen by the assessors);
- questions on four competence areas from your written submission in relation to technical knowledge (these areas are chosen by the assessors);
- questions on ethics;
- finally, if you have any additional evidence you would like to add to support your application – you have up to five minutes to provide this.

### What happens next?

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

If you are successful, you will receive a letter and a certificate from APM confirming your achievement within eight weeks from the results release date. Your name will be included on the Register of Chartered Project Professionals.

Your name will be published on the APM website if you have given permission for us to do so.

If your application is not successful, we will write to you and explain the reason for the decision. You will be given feedback and guidance to help you to resubmit.

If unsuccessful at interview you will have to start the application process again, including your written submission.

## Other things to note

### Confidentiality

APM anticipates that you should be able to provide this information at a level of detail that does not breach any necessary confidentiality. However, please note that all assessors have signed confidentiality agreements.

### Register and directory

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

### Special arrangements

#### ■ Medical and mobility

APM is committed to promoting a positive attitude towards people with special learning and additional needs. It has a great deal of experience in facilitating individual requirements and tailoring adjustments with the aim of removing any unfair disadvantage that an individual may encounter as a consequence of their medical condition.



Access to the facilities or arrangements described here can be granted to applicants with disabilities/learning difficulties who apply to the chartered team. A dispensation may be allowed for applicants with a medical or physical condition that prevents them from completing the assessment within the normal regulations.

#### ■ Other aids/equipment available

Large print papers may be produced where required with prior arrangement with the chartered team.

For assistance with any of the above, or for any other requirements, please contact the chartered team at [chartered@apm.org.uk](mailto:chartered@apm.org.uk).

#### Assessment Results Enquiries/Appeals

By attending the interview candidates are confirming that they are fit to do so: no appeals will be heard concerning a candidate's wellbeing during the interview. For further information visit us at [apm.org.uk/apm-feedback-and-complaints-process/assessment-results-enquiry-process/](http://apm.org.uk/apm-feedback-and-complaints-process/assessment-results-enquiry-process/)

#### FAQs

For frequently asked questions, please visit the APM website at: [apm.org.uk/chpp](http://apm.org.uk/chpp).



## **Appendix 1:**

### **Professional practice assessment criteria for written submission**

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

In this document, the term 'project' is used as a generic term to relate to project, programme or portfolio management or key control functions, with the exception of 1b Financial Management, 11 Asset Allocation, 12 Benefits Management and 21 Resource Capacity Planning, which are specific to programme and/or portfolio management.



## Mandatory competences

You must complete statements against the mandatory competences, and select either 1a Budgeting and cost control, **OR** 1b Financial management.

Competence	Professional practice assessment criteria	Additional guidance
1a Budgeting and cost control	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 establish estimates for different costs associated with a project</p> <p>PP1.2 establish and agree an overall budget for a project</p> <p>PP1.3 apply metrics to establish cost trends within a project</p> <p>PP1.4 update and refine budget allocations based on a cost analysis through the change control process</p> <p>PP2.1 set up funding drawdown arrangements based on an appropriately and accurately informed cash flow forecast</p> <p>PP2.2 produce financial reports for stakeholders based on effective financial performance monitoring</p> <p>PP2.3 ensure the completion of all financial transactions before the closure of a project and produce final financial reports on the financial performance of a project for distribution to relevant stakeholders</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you established estimates for different costs associated with the project, applied metrics to establish cost trends, produced financial reports based on effective financial performance monitoring, and ensured the completion of all financial transactions before the closure of a project and produced final financial reports on the financial performance of the project.</p>
1b Financial management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 adopt a consistent approach to the investment appraisal of a programme or portfolio in line with organisational practice</p> <p>PP1.2 ensure a consistent approach to estimating is used across the programme or portfolio</p> <p>PP1.3 establish control limits for the reporting and approval of budget variances</p> <p>PP1.4 establish arrangements for the release of funds at appropriate stages in a programme or portfolio</p> <p>PP2.1 determine capital and revenue expenditure for a programme or portfolio ensuring alignment with the organisation's financial plan</p> <p>PP2.2 establish financial reporting milestones and reviews for a programme or portfolio</p> <p>PP2.3 produce financial progress reports based on the financial information related to a programme or portfolio</p> <p>PP2.4 adjust a financial plan based on the progress of a programme or portfolio and associated financial reviews</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the programmes or portfolios within your project experience, and explain how you ensured a consistent approach to estimating across the programme or portfolio, established control limits for the reporting and approval of budget variances, established financial reporting milestones and reviews, and adjusted the financial plan based on the progress of a programme or portfolio and associated financial reviews.</p>

## Mandatory competences

Competence	Professional practice assessment criteria	Additional guidance
2 Change control	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 establish, implement and maintain an appropriate change control process</p> <p>PP1.2 capture and record proposed changes to the agreed scope and objectives of the project</p> <p>PP1.3 determine the high-level impact of proposed changes to the scope and objectives of a project including reference to relevant sources</p> <p>PP1.4 use a trend analysis to improve the future performance of projects</p> <p>PP2.1 reach justified recommendations on the approval, rejection or deferral of proposed changes to a project</p> <p>PP2.2 update plans and schedules to reflect approved changes to a project ensuring configuration management is used</p> <p>PP2.3 communicate implemented changes to relevant stakeholders</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you established, implemented and maintained the change control process, undertook an impact analysis with input from others, developed recommendations on how to address the changes and how implemented changes were communicated.</p>
3 Conflict management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 take a proactive approach to identify and address potential conflict situations which may impact on a project</p> <p>PP1.2 take an impartial approach to investigating the cause of conflict</p> <p>PP1.3 evaluate and implement conflict management measures including the role of colleagues and specialists</p> <p>PP1.4 monitor the extent to which conflict management measures are successful</p> <p>PP2.1 support others to resolve conflict</p> <p>PP2.2 respond appropriately and promptly to conflict situations where intervention is required</p> <p>PP2.3 resolve conflict giving due respect to the views, opinions and concerns of all parties</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you took a proactive approach to identify and address potential conflict situations which may have impacted on your project, evaluated and implemented conflict management measures including the role of colleagues and specialists, supported others to resolve conflict, and resolved conflict giving due respect to the views, opinions and concerns of all parties.</p>



## Mandatory competences

Competence	Professional practice assessment criteria	Additional guidance
4 Consolidated planning	<p>You can evidence this across a number of assessment criteria. You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 comply with organisational practice when establishing the structure and format of an effective consolidated plan</p> <p>PP1.2 consider constraints, assumptions, dependencies and governance arrangements when creating a consolidated plan</p> <p>PP1.3 include or refer to other relevant plans and documentation</p> <p>PP1.4 create a consolidated plan which balances the fundamental components of that plan to meet the requirements of a project and ensure formal acceptance of the plan</p> <p>PP2.1 apply configuration management to a plan once it has been formally accepted</p> <p>PP2.2 continually monitor the progress of a project against the consolidated plan</p> <p>PP2.3 adjust the consolidated plan utilising a change control process</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you considered constraints, assumptions, dependencies and governance arrangements when creating a consolidated plan, included or referred to other relevant plans and documentation, applied configuration management to the plan once it had been accepted, and adjusted the plan making use of change control.</p>
5 Governance arrangements	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 define reporting, decision-making hierarchies and levels of authority for a project</p> <p>PP1.2 establish the relationship between a project's governance and the organisation's governance structures</p> <p>PP1.3 design the project governance structure taking into account context, complexity and potential impact</p> <p>PP2.1 ensure clarity of ownership and levels of authority by agreeing the responsibilities and accountabilities with relevant individuals</p> <p>PP2.2 ensure effective reporting and decision making through maintained governance structures, staffing and maintenance of approved reporting and decision making</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you defined reporting, decision-making hierarchies and levels of authority for the project, designed the project governance structure taking into account context, complexity and potential impact, ensured clarity of ownership and levels of authority by agreeing the responsibilities and accountabilities with relevant individuals, and ensured effective reporting and decision making throughout.</p>

## Mandatory competences

Competence	Professional practice assessment criteria	Additional guidance
6 Leadership	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 select an appropriate leadership style based on the situation and/or context</p> <p>PP1.2 collaborate with others to maintain the momentum of a project</p> <p>PP1.3 encourage others to adopt behaviours which builds trust, confidence and collaboration within and between teams</p> <p>PP1.4 establish environments which present opportunities for empowered and autonomous working</p> <p>PP2.1 maintain a team's understanding of, and commitment to the vision, values and objectives of a project through effective and open communication</p> <p>PP2.2 facilitate open discussions to support the identification of potential or real difficulties and challenges to delivering a successful project</p> <p>PP2.3 address difficulties and challenges effectively and in a timely manner</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you selected an appropriate leadership style based on the situation and/or context, encouraged others to adopt behaviours which built trust, confidence and collaboration, maintained the team's understanding of, and commitment to the vision, values and objectives of the project through effective and open communication, and addressed difficulties and challenges effectively and in a timely manner.</p>
7 Reviews	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 consider factors which need to be evaluated during a review</p> <p>PP1.2 establish and implement a schedule of reviews incorporating key milestones during and after a project</p> <p>PP1.3 obtain appropriate information from valid sources to inform the review</p> <p>PP2.1 maintain records of any deviations from plans to include reasons for and responses to the deviations</p> <p>PP2.2 communicate the outcomes of reviews to relevant stakeholders</p> <p>PP2.3 confirm stakeholder understanding and acceptance of proposed actions</p> <p>PP2.4 implement agreed actions and update lessons learned log</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you considered factors which needed to be evaluated during a review, obtained appropriate information from valid sources to inform the review, communicated the outcomes of reviews to relevant stakeholders, and implemented agreed actions and updated the lessons learned log.</p>



## Mandatory competences

Competence	Professional practice assessment criteria	Additional guidance
8 Risk and issue management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <ul style="list-style-type: none"> <li>PP1.1 continually identify risks and issues within a project</li> <li>PP1.2 create a risk management plan including potential impact and suitable responses</li> <li>PP1.3 record issues, how they were resolved, and their implications to inform planning for future projects</li> <li>PP1.4 transfer, accept or avoid unresolved risks at the end of a project</li> <li>PP2.1 assess the probabilities and impacts of the risks within a project and plan their responses</li> <li>PP2.2 assess and plan responses to issues</li> <li>PP2.3 implement responses to risks and issues including escalation, addressing any implications for the future</li> </ul>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you continually identified risks and issues within the project, created a risk management plan including potential impact and suitable responses, assessed the probabilities and impacts of the risks and planned their responses, implemented responses to risks and issues, addressing any implications for the future including escalation.</p>
9 Stakeholder and communications management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <ul style="list-style-type: none"> <li>PP1.1 determine stakeholder interests, requirements and levels of influence for a project</li> <li>PP1.2 produce stakeholder management and communication plans</li> <li>PP1.3 monitor the effectiveness of stakeholder management and communication plans</li> <li>PP1.4 adjust stakeholder management and communication plans to respond to any changing needs of a project</li> <li>PP2.1 employ relevant communication methods and media to meet stakeholder requirements and expectations</li> <li>PP2.2 disseminate clear, timely and relevant information to stakeholders</li> <li>PP2.3 obtain, and respond to, feedback from stakeholders which may have an impact on a project</li> </ul>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you determined stakeholder interests, requirements and levels of influence for a project, monitored the effectiveness of stakeholder management and communication plans, employed relevant communication methods and media to meet stakeholder requirements and expectations and disseminated clear, timely and relevant information to stakeholders.</p>

## Mandatory competences

Competence	Professional practice assessment criteria	Additional guidance
10 Team management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 agree team objectives and ways of working to achieve the vision and goals of a project</p> <p>PP1.2 acknowledge levels of performance through constructive feedback to individuals and teams</p> <p>PP1.3 adopt a proactive approach to communication to establish networks of support and facilitate effective delegation</p> <p>PP2.1 meet the demands of a project through balancing individual and team needs</p> <p>PP2.2 provide opportunities for coaching and mentoring to members of a team</p> <p>PP2.3 address performance issues likely to negatively impact on the success of a project</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you agreed team objectives and ways of working to achieve the vision and goals of the project, adopted a proactive approach to communication to establish networks of support and facilitated effective delegation, met the demands of the project through balancing individual and team needs, and addressed performance issues that were likely to negatively impact on the success of the project.</p>



## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
11 Asset allocation	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 determine changes required by the organisation's strategic objectives</p> <p>PP1.2 categorise related projects and programmes in relation to an organisation's strategic objectives</p> <p>PP1.3 map the intended outputs, outcomes and benefits of related projects and programmes to an organisation's strategic objectives</p> <p>PP1.4 determine gaps which may exist in the alignment of related projects and programmes, either current or proposed, to strategic objectives</p> <p>PP1.5 establish appropriate measures to compare the likely value of, both current and proposed, related projects and programmes to an organisation's strategic objectives</p> <p>PP2.1 use appropriate measures to prioritise related current and proposed projects and programmes</p> <p>PP2.2 consider the availability of finance and other resources when applying prioritisation measures</p> <p>PP2.3 recommend whether projects and programmes should be initiated, maintained or closed to maintain a balanced portfolio</p> <p>PP2.4 communicate appropriately and effectively to stakeholders any recommendations to inform decisions about the maintenance of a balanced portfolio</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the programmes or portfolios within your project experience, and explain how you determined changes required by the organisation's strategic objectives, mapped the intended outputs, outcomes and benefits of related projects and programmes to an organisation's strategic objectives, established appropriate measures to compare the likely value of, both current and proposed, related projects and programmes to the organisation's strategic objectives, and considered the availability of finance and other resources when applying these measures.</p>



## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
12 Benefits management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 demonstrate how the intended benefits relate to strategic objectives</p> <p>PP1.2 establish measurable benefits which are meaningful to stakeholders</p> <p>PP1.3 prioritise achievement of benefits based on their level of contribution to strategic objectives</p> <p>PP1.4 confirm dependencies between intended benefits and the outputs, outcomes and related business changes</p> <p>PP2.1 create a benefits management strategy which considers priorities, timescales and responsibilities, and monitoring methods</p> <p>PP2.2 create a benefits realisation plan which considers funding options, key indicators, milestones and reporting schedules</p> <p>PP2.3 carry out effective monitoring against the benefits realisation plan</p> <p>PP2.4 based on monitoring outcomes, take action to highlight recommended adjustments to maximise benefits realisation</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the programmes or portfolios within your project experience, and explain how you demonstrated how the intended benefits related to strategic objectives, prioritised achievement of benefits based on their level of contribution to strategic objectives, created a benefits management strategy which considered priorities, timescales and responsibilities, and monitoring methods, carried out effective monitoring against the benefits realisation plan, and took action to highlight recommended adjustments to maximise benefits realisation based on the monitoring outcomes.</p>



## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
13 Business case	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 determine the relevant factors which could influence the development of a convincing business case</p> <p>PP1.2 support a persuasive argument through effective analysis of relevant factors</p> <p>PP1.3 establish a benefits framework for a business case</p> <p>PP1.4 document a business case in a relevant format</p> <p>PP2.1 gain initial and ongoing formal acceptance of a business case</p> <p>PP2.2 monitor and refine a business case as circumstances and factors change</p> <p>PP2.3 implement a change control process and configuration management system when updating a business case</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you supported a persuasive argument through effective analysis of relevant factors, documented a business case in a relevant format, gained initial and ongoing formal acceptance of the business case, and implemented a change control process and configuration management system when updating the business case.</p>
14 Capability development	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 conduct a skills analysis on individuals within an organisation to identify gaps in competences required to deliver a successful project</p> <p>PP1.2 develop a training and development strategy in relation to project management</p> <p>PP1.3 implement a training and development strategy in relation to project management</p> <p>PP2.1 use tools and techniques to determine an organisation's capability to support a project</p> <p>PP2.2 apply relevant competency models to an organisation's workforce in relation to project management</p> <p>PP2.3 monitor and evaluate organisational learning against objectives</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the programmes or portfolios within your project experience, and explain how you conducted a skills analysis on individuals within the organisation to identify gaps in competences required to deliver a successful project, implemented a training and development strategy in relation to project management, applied relevant competency models to the organisation's workforce in relation to project management, and monitored and evaluated organisational learning against objectives.</p>

## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
15 Contract management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 effectively monitor supplier performance against agreed contractual obligations</p> <p>PP1.2 ensure the organisation meets its contractual obligations through effective monitoring</p> <p>PP2.1 respond appropriately to ensure all parties comply with the terms of a contract</p> <p>PP2.2 manage contract variances promptly to resolve any contractual problems</p> <p>PP2.3 effectively manage supplier relationships</p> <p>PP2.4 effectively close a contract once all contractual obligations have been met</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you effectively monitored supplier performance against agreed contractual obligations, responded appropriately to ensure all parties complied with the terms of the contract, effectively managed supplier relationships, and effectively closed the contract once all contractual obligations had been met.</p>
16 Frameworks and methodologies	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 analyse potential frameworks/methodologies for the management of projects</p> <p>PP1.2 determine internal and external contexts which could affect the use of a framework/methodology</p> <p>PP1.3 identify the underlying framework/methodology principles that will suit the management of projects within the organisation</p> <p>PP2.1 define the processes, standards and guidelines to implement the framework and/or methodology over the lifecycle of projects, adopting these from existing sources, or developing them as required.</p> <p>PP2.2 reflect on the strengths and limitations of a framework/methodology making refinements as required based on experience</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you analysed potential frameworks/methodologies for the management of the project, determined the internal and external contexts which could affect the use of a framework/methodology, defined the processes, standards and guidelines to implement the framework and/or methodology over the lifecycle of projects, adopting these from existing sources, or developing them as required, and reflected on the strengths and limitations of a framework/methodology</p>



## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
17 Independent assurance	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 effectively resource independent assurance activities</p> <p>PP1.2 agree the scope of and responsibilities for manageable independent assurance activities</p> <p>PP1.3 prioritise independent assurance activities based on a risk assessment of the projects</p> <p>PP2.1 conduct independent assurance activities making recommendations for corrective action where required</p> <p>PP2.2 maintain effective two-way communication with all stakeholders such that corrective action is reported and concerns are addressed promptly</p> <p>PP2.3 provide effective advice, guidance and support to the implementation of recommendations</p> <p>PP2.4 analyse patterns of change which could inform the future performance of projects</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you effectively resourced independent assurance activities, agreed the scope of and responsibilities for manageable independent assurance activities, conducted independent assurance activities making recommendations for corrective action where required, and analysed patterns of change which could inform the future performance of projects.</p>
18 Procurement	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 establish the type, quality and quantity of the resource requirement</p> <p>PP1.2 develop detailed specifications for the procurement of resources for a project</p> <p>PP1.3 evaluate technical and commercial options for fulfilling the requirements</p> <p>PP1.4 agree a procurement plan with relevant stakeholders</p> <p>PP2.1 negotiate and secure internal resources to effectively deliver a project</p> <p>PP2.2 comply with organisational procedures when selecting and negotiating with suppliers based on a rigorous tendering process</p> <p>PP2.3 agrees viable contracts and statements of work in line with organisational requirements</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you established the type, quality and quantity of the resource requirement, developed detailed specifications for the procurement of resources for the project, agreed a procurement plan with relevant stakeholders, and agreed viable contracts and statements of work in line with organisational requirements.</p>

## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
19 Quality management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 establish agreed quality indicators for the processes and outputs of the project referring to the business case</p> <p>PP1.2 prepare the quality management plan for a project through liaison with relevant stakeholders and in accordance with the processes, culture and values of the organisation</p> <p>PP1.3 create a quality register for a project</p> <p>PP2.1 manage the process of quality assurance for a project, to confirm the consistent application of the procedures and standards defined in the quality management plan.</p> <p>PP2.2 manage the process of quality control for a project to determine whether success criteria are met.</p> <p>PP2.3 capture lessons learned during a project to contribute to continual improvement.</p> <p>PP2.4 action outcomes from the quality management process, implementing the change control process where required.</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you established agreed quality indicators for the processes and outputs of the project referring to the business case, created a quality register for the project, managed the process of quality control for the project to determine whether success criteria had been met, and actioned outcomes from the quality management process, implementing the change control process where required.</p>



## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
20 Requirements management	<p>You need to demonstrate <b>a minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 conduct an analysis of stakeholder wants and needs to inform a schedule of requirements</p> <p>PP1.2 prioritise stakeholder wants and needs based on effective research</p> <p>PP1.3 through effective research, determine dependencies and constraints within a project which may influence the approach to, and outcomes of, that project</p> <p>PP1.4 confirm the outcomes of all research through internal and/or external experts</p> <p>PP2.1 produce a final schedule of requirements based on effective negotiation with stakeholders</p> <p>PP2.2 clearly document the requirements agreed within the schedule of requirements</p> <p>PP2.3 adjust the schedule of requirements during the project if required using the change control process</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you conducted an analysis of stakeholder wants and needs to inform a schedule of requirements, confirmed the outcomes of all research through internal and/or external experts, produced a final schedule of requirements based on effective negotiation with stakeholders, and clearly documented the requirements agreed within the schedule of requirements.</p>

## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
21 Resource capacity planning	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 establish resource requirements for each project</p> <p>PP1.2 determine where related projects have dependencies and similar deadlines, taking account of the schedule for realisation of benefits</p> <p>PP1.3 assess the total resource capacity for the duration of all related projects</p> <p>PP1.4 phase the related projects to fully optimise resource usage taking account of opportunities for shared infrastructures and/or procurement</p> <p>PP1.5 build contingencies into relevant resource plans</p> <p>PP2.1 establish reporting requirements and schedules for relevant project managers</p> <p>PP2.2 inform the direction of project activities through effective scheduling of phases, milestones and review points</p> <p>PP2.3 prepare and deliver overall progress reports to relevant stakeholders</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the programmes or portfolios within your project experience, and explain how you established resource requirements for each project, assessed the total resource capacity for the duration of all related projects, built contingencies into relevant resource plans, and prepared and delivered overall progress reports to relevant stakeholders.</p>



## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
22 Resource management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 establish resource requirements for all activities and events within a project</p> <p>PP1.2 determine internal and external resources which are available to support the delivery of a project and any dependencies between those availabilities</p> <p>PP1.3 prepare a schedule for resource use, reconciling resource limits and time constraints by applying resource smoothing and/or levelling</p> <p>PP2.1 monitor resource use against the schedule during the project and identify variances that require action</p> <p>PP2.2 refine a resource schedule using the change control process</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you established the resource requirements for all activities and events within the project, determined internal and external resources which were available to support the delivery of the project and any dependencies between those availabilities, monitored resource use against the schedule during the project and identified variances that required action, and refined the resource schedule using the change control process.</p>
23 Schedule management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 define, in appropriate detail, activities and events to be completed during a project</p> <p>PP1.2 determine relationships and dependencies between activities and events, and their implications to the organisation</p> <p>PP1.3 develop duration estimates and critical dates for each activity and event</p> <p>PP2.1 accurately document a schedule of phases, milestones and review points for a project, sufficient to inform the direction of work and the monitoring of progress</p> <p>PP2.2 refines a schedule of activities based on effective monitoring, implementing the change control process when required</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you defined, in appropriate detail, activities and events to be completed during the project, developed duration estimates and critical dates for each activity and event, accurately documented a schedule of phases, milestones and review points for the project, sufficient to inform the direction of work and the monitoring of progress, and refined the schedule of activities based on effective monitoring, implementing the change control process where required.</p>



## Elective competences

Competence	Professional practice assessment criteria	Additional guidance
24 Solutions development	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 use appropriate tools and techniques to identify options to deliver the requirements for a project</p> <p>PP1.2 use appropriate tools and techniques to evaluate and select options to deliver the requirements for a project</p> <p>PP1.3 document the requirements and selection option for delivery of the project</p> <p>PP2.1 implement an effective monitoring process</p> <p>PP2.2 refine delivery options as required and implement the change control process updating the configuration management system as and when required</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you used appropriate tools and techniques to identify options to deliver the requirements for the project, documented the requirements and selection option for delivery of the project, implemented an effective monitoring process, and refined delivery options as required and implemented the change control process updating the configuration management system as and when required.</p>
25 Transition management	<p>You need to demonstrate a <b>minimum of four of the following assessment criteria</b> to show that you can:</p> <p>PP1.1 determine key staff required to support a transition process</p> <p>PP1.2 establish the logistic requirements to support a transition process</p> <p>PP1.3 determine the knowledge transfer requirements for a transition process</p> <p>PP1.4 create a transition plan where priorities, potential disruption and output ownership are key considerations</p> <p>PP2.1 negotiate with stakeholders to gain agreement on the transition process plan</p> <p>PP2.2 negotiate with stakeholders to gain agreement on staffing solutions, logistics and knowledge transfer requirements</p> <p>PP2.3 establish a benefit review process to monitor benefits realisation which meets the requirements of relevant stakeholders</p>	<p>To meet the minimum four assessment criteria in this instance, you could, for example, provide examples from one of the projects within your project experience, and explain how you determined key staff required to support the transition process, established the logistic requirements to support the transition process, created a transition plan where priorities, potential disruption and output ownership were key considerations, and negotiated with stakeholders to gain agreement on staffing solutions, logistics and knowledge transfer requirements.</p>



## **Appendix 2:**

# **Technical knowledge assessment criteria for interview (if required)**

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

In this document, the term 'project' is used as a generic term to relate to project, programme or portfolio management or key control functions, with the exception of 1b Financial Management, 11 Asset Allocation, 12 Benefits Management and 21 Resource Capacity Planning, which are specific to programme and/or portfolio management.

## Mandatory competences

Competence	Technical knowledge assessment criteria	Additional guidance
1a Budgeting and cost control	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 evaluate cost tracking tools and techniques</li> <li>TK1.2 evaluate the limitations of cost estimation in the context of a project</li> <li>TK1.3 discuss the value of cost analysis to a project</li> <li>TK2.1 evaluate the importance of cash flow and cash flow forecasts in the context of a project</li> <li>TK2.2 suggest why the monitoring of the financial performance of a project is important to project objectives</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining why a certain model could be used over another, demonstrating evaluation of cost tracking tools and techniques.</p>
1b Financial management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate methods for producing an effective investment appraisal to a programme or portfolio</li> <li>TK1.2 evaluate the importance of differing levels of financial accountability in a programme or portfolio</li> <li>TK1.3 analyse sources and impact of estimation bias</li> <li>TK2.1 evaluate the importance of aligning the financial plan of a programme or portfolio to an overall financial plan</li> <li>TK2.2 analyse the extent to which adjusting a financial plan would be beneficial to a programme or portfolio and the sources required to do this</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining why a certain method could be used over another, demonstrating critical evaluation of methods for producing an effective investment appraisal.</p>



## Mandatory competences

Competence	Technical knowledge assessment criteria	Additional guidance
2 Change control	You need to show that you can: TK1.1 critically evaluate the features and benefits of using a change control process TK1.2 analyse ways in which to collate and record information from stakeholders TK1.3 evaluate the extent to which trend analysis adds value to the management of change within a project TK2.1 critically evaluate methods of impact assessment and options analysis in relation to change within a project TK2.2 evaluate the importance of responding appropriately to recommendations relating to the scope and objectives of a project TK2.3 analyse the importance of managing approved change within a configuration management system	The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining and evaluating the features and benefits of using a change control process.
3 Conflict management	You need to show that you can: TK1.1 evaluate positive and negative conflict in the context of a project TK1.2 critically evaluate the causes of conflict TK1.3 analyse ways in which to effectively manage conflict in the context of a project TK1.4 evaluate the extent to which conflict could be a tool to improve performance TK2.1 evaluate the methods and techniques which could be used to manage and resolve conflict including monitoring their effectiveness TK2.2 evaluate the importance of objectivity and impartiality when resolving conflict	The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the third criterion, this could take the form of explaining ways that you could effectively manage conflict and why you might choose these approaches over alternatives, demonstrating analysis of ways in which to effectively manage conflict.

## Mandatory competences

Competence	Technical knowledge assessment criteria	Additional guidance
4 Consolidated planning	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate the purpose of a consolidated plan</li> <li>TK1.2 analyse different formats for consolidated plans</li> <li>TK2.1 evaluate the importance of monitoring the relationship between a consolidated plan and the progress of a project</li> <li>TK2.2 analyse situations, potential or real, where a consolidated plan may have to be adjusted in the context of a project</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the second criterion, this could take the form of explaining the different types of plan that you could employ within a project, and how you could use them to meet different needs and purpose, demonstrating analysis of different formats for consolidated plans.</p>
5 Governance arrangements	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate the concepts of hierarchies and organisational structures in the context of a project</li> <li>TK1.2 analyse types of organisational structure</li> <li>TK1.3 evaluate the importance of establishing and maintaining timely reporting and decision-making hierarchies for a project</li> <li>TK2.1 evaluate the importance of establishing governance structures, roles and responsibilities within a project</li> <li>TK2.2 evaluate the importance of establishing clear levels of authority within a project</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining the hierarchies and structures that you could employ within a project and why those might be chosen over alternatives, demonstrating critical evaluation of the concepts of hierarchies and organisational structure in the context of a project.</p>



## Mandatory competences

Competence	Technical knowledge assessment criteria	Additional guidance
<p>6 Leadership</p>	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate a range of leadership styles and when to adopt them in a project context</li> <li>TK1.2 evaluate the tools, techniques and behaviours, for gaining and maintaining trust, confidence and collaboration of others</li> <li>TK1.3 evaluate the environments to encourage empowered and high-performing teams</li> <li>TK2.1 analyse ways in which leaders can effectively communicate the vision and values of the project with team members and stakeholders</li> <li>TK2.2 evaluate methods for addressing difficulties and challenges, including escalation</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining the leadership styles that you could adopt in project work, and why they might be appropriate at different times, demonstrating critical evaluation of the range of leadership styles and when to adopt them in the context of a project.</p>
<p>7 Reviews</p>	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate a range of factors during reviews, and how these vary through the stages of a project</li> <li>TK1.2 critically evaluate the importance of aligning reviews with organisational, legal and regulatory requirements</li> <li>TK1.3 evaluate the validity of various sources of information</li> <li>TK2.1 analyse situations, potential or real, where deviations to a plan may occur in the context of a project and how to determine suitable solutions</li> <li>TK2.2 critically evaluate the importance of stakeholder engagement when implementing the outcomes of reviews</li> <li>TK2.3 analyse the importance of managing updates to documentation impacted by reviews</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining the range of what you could consider during reviews, and how you might approach them across the different stages of the project, demonstrating critical evaluation of the range of factors during reviews, and how these vary through the stages of a project.</p>

## Mandatory competences

Competence	Technical knowledge assessment criteria	Additional guidance
8 Risk and issue management	You need to show that you can: TK1.1 evaluate the function of a risk and issue management plans and registers in the context of a project TK1.2 analyse approaches to risk identification TK1.3 analyse qualitative and quantitative methods to assess risk in the context of a project TK2.1 evaluate the importance of risk and issue impact assessments within the context of a project TK2.2 critically evaluate approaches to impact assessments and response planning TK2.3 evaluate the function of a change control process in the management of risks and issues	The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the second criterion, this could take the form of explaining how you could approach risk identification and when and why these approaches might be appropriate, demonstrating analysis of approaches to risk identification
9 Stakeholder and communications management	You need to show that you can: TK1.1 critically evaluate the importance of stakeholder management and communication in the context of a project TK1.2 critically analyse the methods to identify stakeholders and analyse their interests, requirements and levels of influence TK1.3 analyse ways in which to effectively engage with stakeholders TK2.1 evaluate methods and media used to communicate with stakeholders TK2.2 evaluate the importance of stakeholder feedback in the context of a project	The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the second criterion, this could take the form of explaining how you could approach stakeholder identification and analysis and when and why these methods would be appropriate, demonstrating analysis of methods to identify stakeholders and their interests, requirements and levels of influence



## Mandatory competences

Competence	Technical knowledge assessment criteria	Additional guidance
10 Team management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 analyse tools and techniques to develop and maintain an effective team</li> <li>TK1.2 evaluate the relationship between a team development cycle and motivated and co-ordinated teams</li> <li>TK1.3 evaluate the role of performance feedback as a tool</li> <li>TK1.4 critically evaluate styles of communication and their adaptation during a project</li> <li>TK2.1 analyse ways in which individuals and teams can be supported during a project</li> <li>TK2.2 evaluate coaching and mentoring as development techniques</li> <li>TK2.3 critically evaluate the relationship between performance management and the success of a project</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining tools and techniques to develop and maintain an effective team, and why and when you might use those over alternatives.</p>



## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
11 Asset allocation	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate approaches to aligning programmes or portfolios to strategic objectives</li> <li>TK1.2 analyse measures which could be used to compare the likely value of, both current and proposed, related projects and programmes to an organisation's strategic objectives</li> <li>TK1.3 critically evaluate different categories or risk and how these might be appraised</li> <li>TK2.1 evaluate the importance of a balanced portfolio to the achievement of strategic objectives</li> <li>TK2.2 analyse approaches to maintaining a balanced portfolio</li> <li>TK2.3 Evaluate methods of representing balanced portfolios</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the forth criterion, this could take the form of explaining why a balanced portfolio is important to achieving strategic objectives.</p>
12 Benefits management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate approaches to confirming and categorising benefits against strategic objectives</li> <li>TK1.2 critically evaluate approaches to establishing measures for benefits</li> <li>TK1.3 critically evaluate approaches to identifying and recording dependencies between benefits</li> <li>TK2.1 evaluate the significance of a benefits management strategy and a benefits realisation plan</li> <li>TK2.2 analyse approaches to monitoring the progress of a benefits realisation plan</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining how you could approach confirming and categorising benefits against strategic objectives, and why you might choose these approaches over alternatives, demonstrating critical evaluation of approaches to confirming and categorising benefits against strategic objectives.</p>



## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
13 Business case	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate the importance of understanding organisational strategies and constraints when developing a business case</li> <li>TK1.2 analyse methods of establishing a benefits framework</li> <li>TK1.3 critically evaluate the importance of identifying optimism bias and establishing confidence limits</li> <li>TK2.1 analyse different formats of a business case that could be used to engage with stakeholders to secure support</li> <li>TK2.2 evaluate the importance of monitoring and refining the business case during the project</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining how you accommodated organisational strategies and constraints when developing your business, why this was important and how it impacted your work, demonstrating critical evaluation of the importance of understanding organisational strategies and constraints when developing a business case.</p>
14 Capability development	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate the importance of conducting a skills analysis on individuals who will be deployed on projects</li> <li>TK1.2 evaluate the importance of an effective learning and development strategy to the creation of a competent workforce employed on projects</li> <li>TK1.3 analyse approaches to implementing a learning and development strategy</li> <li>TK2.1 analyse tools and techniques which could be used to determine an organisation's capability to support projects</li> <li>TK2.2 evaluate the importance of applying relevant competence models to an organisation</li> <li>TK2.3 critically evaluate approaches to monitoring and evaluating organisational learning in relation to project management</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining why conducting a skills analysis was important and how it impacted your work, demonstrating critical evaluation of the importance of conducting a skills analysis on individuals who will be deployed on projects</p>

## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
15 Contract management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate the importance of ensuring both parties in a contract meet their obligations within that contract</li> <li>TK1.2 critically evaluate methods and indicators for identifying supplier performance problems</li> <li>TK2.1 analyse approaches for effective contract management in the context of a project</li> <li>TK2.2 critically evaluate ways of establishing and maintaining productive relationships with suppliers</li> <li>TK2.3 critically evaluate approaches to the resolution of contract problems including contract variances</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining why it is important that both parties in a contract meet their obligations, and how it could impact a project if this is not done, demonstrating critical evaluation of the importance of ensuring both parties in a contract meet their obligations to that contract.</p>
16 Frameworks and methodologies	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate characteristics and limitations of different frameworks and methodologies which could be used for a project</li> <li>TK1.2 evaluate approaches to tailoring frameworks and methodologies</li> <li>TK2.1 critically evaluate the sources of information which could inform the selection of an appropriate framework and/or methodology</li> <li>TK2.2 analyse the benefits and costs of prescribing frameworks and methodologies to different aspects of projects</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining frameworks and methodologies that you could use for a project, and what characteristics and limitations these have when implemented, demonstrating critical evaluation of characteristics and limitations of different frameworks and methodologies which could be used for a project.</p>



## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
17 Independent assurance	<p>You need to show that you can:</p> <p>TK1.1 analyse approaches to independent assurance to ensure that these activities add value</p> <p>TK1.2 critically evaluate the relationship between risk assessment and independent assurance activities</p> <p>TK2.1 evaluate methods of communicating the outcomes of independent assurance activities to relevant stakeholders, and maintaining open communication about these</p> <p>TK2.2 critically evaluate the importance of reinforcing recommendations with advice, guidance and support</p>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining approaches that you could use for independent assurance, why these might be chosen over alternatives, and how you ensured that these activities added value, demonstrating analysis of approaches to independent assurance to ensure that these activities added value.</p>
18 Procurement	<p>You need to show that you can:</p> <p>TK1.1 critically evaluate the implication of different procurement options</p> <p>TK1.2 evaluate the function of procurement specifications in a project</p> <p>TK1.3 analyse approaches to identifying resources required</p> <p>TK2.1 critically evaluate approaches to negotiate internal and external resource</p> <p>TK2.2 analyse approaches to selecting suppliers</p> <p>TK2.3 critically evaluate the nature and implications of different forms of contract</p>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining approaches that you could use for procurement, why these were chosen over alternatives, and the implication of these, demonstrating critical evaluation of the implication of different procurement options.</p>

## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
19 Quality management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 analyse the characteristics of effective quality management processes</li> <li>TK1.2 evaluate the importance and potential sources of effective quality indicators</li> <li>TK1.3 critically analyse approaches for developing quality management plans</li> <li>TK2.1 analyse the importance of configuration management to a project</li> <li>TK2.2 evaluate principles and practical implications of continual improvement</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining key characteristics of quality management processes that you could use, and why these would or would not be effective, demonstrating analysis of the characteristics of effective quality management processes.</p>
20 Requirements management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 evaluate methods and approaches to investigate and select different possible requirements</li> <li>TK1.2 evaluate the importance of engaging with stakeholders to inform requirements and confirm the outcomes of research</li> <li>TK2.1 critically evaluate the role of negotiation in confirming requirements</li> <li>TK2.2 analyse the characteristics of well-specified requirements</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining what methods and approaches you could use to investigate and select different possible requirements, and why these methods and approaches might be chosen over alternatives, demonstrating evaluation of methods and approaches to investigate and select different possible requirements.</p>



## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
21 Resource capacity planning	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 critically evaluate the role of resource capacity planning in the context of multiple projects</li> <li>TK1.2 analyse tools and methods which could be used to support effective resource capacity planning</li> <li>TK2.1 evaluate the importance of effective co-operation with project managers when scheduling resources deployed within related projects</li> <li>TK2.2 evaluate the role of milestones and reviews when managing related projects</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining the role that resource capacity planning has had in the context of your multiple projects, and how you could use it to meet different needs, demonstrating evaluation of methods and approaches to investigate and select different possible requirements.</p>
22 Resource management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 analyse different characteristics of resources</li> <li>TK1.2 evaluate the role of assumptions in resource planning</li> <li>TK1.3 analyse methods which could be used to manage resources used within a project</li> <li>TK2.1 critically evaluate the benefits to a project of constantly monitoring and refining a resource schedule</li> <li>TK2.2 analyse the techniques to guide the choice, capture and analysis of relevant data to effectively monitor resources</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining different resources that you could use in projects and how they vary, and how you could use them to meet different needs, demonstrating analysis of different characteristics of resources.</p>

## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
23 Schedule management	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 evaluate the importance of considering the approaches taken and outcomes of other projects when scheduling work activities</li> <li>TK1.2 critically analyse network analysis methods</li> <li>TK1.3 analyse methods which could be used to establish dependencies, estimates and confidence limits</li> <li>TK2.1 evaluate appropriate tools and techniques which could be used to schedule and monitor phases, milestones and review points within a project</li> <li>TK2.2 evaluate approaches to capturing and analysing relevant data to monitor and refine a schedule</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining why it is important to consider approaches to scheduling work including the outcomes of other projects, and the possible impact of not doing this, demonstrating evaluation of the importance of considering the approaches taken and outcomes of other projects when scheduling work activities.</p>
24 Solutions development	<p>You need to show that you can:</p> <ul style="list-style-type: none"> <li>TK1.1 evaluate possible tools and techniques which could be used to identify options to deliver the requirements for a project</li> <li>TK1.2 evaluate tools and techniques which could be used to analyse and select options to deliver the requirements for a project</li> <li>TK2.1 critically evaluate the importance of modelling, prototyping and testing</li> <li>TK2.1 evaluate the importance of monitoring and refining delivery requirements and options within a project</li> </ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining tools and techniques that could be used to identify options, and why these might be chosen over alternatives, demonstrating evaluation of possible tools and techniques which could be used to identify options to deliver the requirements for a project.</p>



## Elective competences

Competence	Technical knowledge assessment criteria	Additional guidance
25 Transition management	<p>You need to show that you can:</p> <ul style="list-style-type: none"><li>TK1.1 critically evaluate the importance of assessing business readiness in transition management</li><li>TK1.2 analyse the use of change management models in transition management</li><li>TK2.1 critically evaluate the benefits to a transition process of effective stakeholder engagement</li><li>TK2.2 critically evaluate the extent to which a benefits realisation plan adds value to a project</li></ul>	<p>The interview is your opportunity to demonstrate evidence of your knowledge in response to questions from the assessor about your understanding of project management principles. For example, for the first criterion, this could take the form of explaining the importance of assessing business readiness and the impact of not doing so, demonstrating evaluation of the importance of assessing business readiness in transition management</p>









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