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| Professional Membership Application Form  By Assessment  The Association can accept applications for Professional Membership By Assessment from those possessing knowledge and experience equivalent to a Level 5 or higher qualification in Arboriculture.  If you are in doubt as to whether your knowledge is at this level, please check our qualification guides for help benchmarking your experience on [www.trees.org.uk](http://www.trees.org.uk) or email us at [membership@trees.org.uk](mailto:membership@trees.org.uk). | | | |
| **Personal Details:** | | | |
| Title (Mr/Mrs etc.): |  | Date of Birth: |  |
| Forenames: |  | Surname: |  |
| Company Name: |  | Mobile: |  |
| Work Phone: |  | Email Address: |  |
| **Delivery Address:** | | **Billing Address:** | |
| Line 1: |  | Line 1: |  |
| Line 2: |  | Line 2: |  |
| Line 3: |  | Line 3: |  |
| Town: |  | Town: |  |
| Postcode: |  | Postcode: |  |
| County: |  | County: |  |
| Country: |  | Country: |  |
| **How would you best describe your main area of work (select one):** | | | |
| Contractor (Arb) |  | Education |  |
| Consultant (Arb) |  | Utility |  |
| Forestry |  | Local Authority |  |
| Landscape |  | Student |  |
| Horticulture |  | Retired |  |
| Other |  | | |

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| **Application Fees:** | | | | | | | | |
| **Region** | **UK** | | **Europe** | | **Rest of World** | | | |
| **Professional Annual Subscription** | **£216.00** |  | **£221.87** |  | **£231.87** | |  | |
|  | | | | | | | | |
| **Optional Extras** | | | | | | | | |
| **Utility Membership**  *You will receive meeting minutes and regular safety bulletins, along with invites to various industry consultations and the option to vote for UAG Core Group representatives.* | | | | | |  | |  |

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| **CPD Requirements** |
| As a Professional member you will be committing to complete a minimum of **40** hours of CPD over a three-year period. If this CPD criteria changes at any point you will be notified. Please note that the AA has a policy of randomly sampling our members CPD on an annual basis. |
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| **Data Protection and Privacy Policy** |

We will use the information you have provided to us in order to send you the information and publications to which members are entitled so long as your membership remains current. The information and publications we send you may be accompanied by relevant advertising material. We may contact you to discuss matters pertinent to arboriculture or your membership of the AA. You can opt in or out of specific communication types via your online account.

Our full Data Protection and Privacy policy is viewable via the following link: <https://www.trees.org.uk/Trees.org.uk/media/Trees-org.uk/Documents/Data-Protection-Policy-131017.pdf>

We will not sell, distribute or lease your personal information to third parties unless are required by law to do so.

*You may change your mind at any time emailing us at* [*membership@trees.org.uk*](mailto:membership@trees.org.uk)*, or by writing to Arboricultural Association, The Malthouse, Stroud Green, Standish, Stonehouse, Gloucestershire GL10 3DL*

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| **Declaration** |

wish to apply for membership of the Arboricultural Association.

1. If accepted I will observe the Rules of the Association as set out in the Memorandum and Articles of Association, its Code of Ethics and Professional Conduct (please see [www.trees.org.uk](http://www.trees.org.uk) )
2. I will do all in my power to further the objectives of the Association
3. I have read the Notes on Promotion and Use of the AA Logo (please see [www.trees.org.uk](http://www.trees.org.uk) ). I will use the Association’s Professional member logo in my advertising or on my stationery only as authorised to do so by the Arboricultural Association
4. I have read the Notes on Data Protection and Privacy Policy, shown above.
5. I will cooperate with the Association should it choose to undertake an investigation into any complaint made against me
6. I understand that if accepted as a Professional Member of the Arboricultural Association I will become entitled to use the post-nominals “MArborA” only after written confirmation from the Association
7. I understand that if my subscription to the Arboricultural Association lapses at any time I will cease to be entitled to use the post-nominals “MArborA” after my name
8. I understand that if subsequent to a membership lapse I re-join the Association, Professional Membership can only be regained by fulfilling the Professional Membership requirements applicable at the time of membership renewal
9. I understand that Continuing Professional Development is an essential requirement for on-going Professional Membership and that failure to engage in CPD and to provide evidence when requested may jeopardise my future entitlement to the grade of Professional Member of the Arboricultural Association. The current requirement is **40 hours** over a three year period.
10. I confirm that the enclosed documentation is correct to the best of my knowledge.

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| Signed: |  | Date: |  |

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| **Choose your payment option** | | | |
| Please  **Tick**  Payment  Method |  | **Cheque** – made payable to the ‘Arboricultural Association’ (must be enclosed with application form). | |
|  | **BACS Payment** – please use the following details: Arboricultural Association,  National Westminster Bank; Account number 06009514; Sort code: 60-18-46. | |
| Payment Date: | Payment Reference: |
|  | **Card Payment** | |

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| Assessed Route – Portfolio Element Selection |

I am seeking to upgrade to, Professional Membership grade and provide a portfolio of evidence to be assessed.

I enclose my portfolio of evidence and the relevant element checklist for the below 10 elements (please mark each element that you have submitted)

**ELEMENTS**

|  |  |  |  |  |  |  |  |  |  |  |
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| 6 Elements from 1 to 10 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|  |  |  |  |  |  |  |  |  |  |  |
| 4 Elements from 11 to 15 | 11 | 12 | 13 | 14 | 15 |  |  |  |  |  |
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| Assessed Route – Information and Evidence Criteria |

The candidate will be assessed against a portfolio of evidence\* for the performance criteria of 10 from 15 elements (taken from the National Occupational Standard) as listed.The candidate will need to complete a minimum of 6 elements from numbers 1 to 10 and 4 elements from numbers 11 to 15, making a total of 10 elements. Element choice will be up to the candidate.

The Assessor will judge the candidate’s portfolio against the requirements of the National Occupational Standards and decide

1. Pass, or
2. Fail, or
3. Invite to interview for clarification.

This result will then be subject to verification and the applicant informed accordingly.

Note that any appropriate AALGO elements can be used as evidence.

**TIMING**

Assessment and decision to be dealt with within 6 weeks of application, including verification, providing that no interview is required. Interviews will be held twice a year at venues and times published on the Arboricultural Association website and in the ARB Magazine.

**APPEALS**

Appeals are to be made in writing within 3 weeks of receiving the result. Appeals will be dealt with by the Verifier within 3 weeks and if the appeal is dismissed the appellant will be informed in writing with an explanation.

**ASSESSMENT CHARGE – non-refundable**

The fee of £100.00 is payable on application. If an interview is required, a further £125.00 will be payable before the interview.

**INFORMATION AND ENQUIRIES**

Information on the procedure over and above the written detail can be obtained from Guy Watson or Rhoderic Taylor.

**\* PORTFOLIO OF EVIDENCE**

The portfolio of evidence for each element will need to match the Performance Criteria as stated.

If necessary, assistance can be obtained from the Assessor as to the type of evidence which would be suitable.

Candidates should endeavour to provide only sufficient documentation to meet the requirements for that element.**ELEMENT 1 - Deliver an Arboricultural Training Programme for Individuals or Groups**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Check location is suitable for programme delivery and meets Health and Safety requirements. |  |  |
| 1. Carry out on site arboricultural checks for hazards and safety of all participants including any necessary instructions as to care. |  |  |
| 1. Have equipment and PPE available in sufficient quantity. |  |  |
| 1. Check trainees in to a register to be retained for records. |  |  |
| 1. Advise participants of site and safety issues at the start and during the programme. |  |  |
| 1. Advise trainees as to procedure for using equipment etc. and establish prior knowledge and level of skill. |  |  |
| 1. Deliver programme in a logical systematic manner and at a pace to suit. |  |  |
| 1. Check progress of participants and provide feedback to check understanding. |  |  |
| 1. Ensure communications are maintained throughout to ensure maximum participation and gain. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. The reason for selecting a suitable site and the need to provide realistic situations and scenarios. |  |  |
| 1. Why the site should be checked and findings recorded and the legal implications; and that trees should receive the same assessment. |  |  |
| 1. Why equipment needs to be serviceable and appropriate to the skill level being taught and that PPE should meet requirements. |  |  |
| 1. The need to develop a rapport with participants by introductions and keeping records, ensuring records comply with Data Protection Act. |  |  |
| 1. That instructions should stress the arboricultural content and any possible areas of risk. |  |  |
| 1. Why the programme content is pitched at a particular level and why gaps in knowledge and technique should be identified. |  |  |
| 1. Why the course should be run systematically and efforts made to maintain attention. |  |  |
| 1. The need for periodic checking of progress by ‘testing’ and feedback; and why assessment as an on-going part may be valuable. |  |  |
| 1. The need to use a range of communication techniques for candidates/participants to gain maximum benefit. |  |  |
| 1. Why a positive environment is more beneficial. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 2 - Prepare Arboricultural Training Material for Individuals and Groups**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Identify the range of topics to be delivered and ensure arboricultural technical content meets the individual or group needs. |  |  |
| 1. Select technical equipment for the individuals or groups ensuring there are sufficient for the task including trees. |  |  |
| 1. Prepare programme for delivery which suits the recipient and the available time. |  |  |
| 1. Identify a suitable location ensuring it meets Health and Safety requirements. |  |  |
| 1. Carry out, prepare and make available on site specific risk assessment. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. How to choose the tree related topics to ensure development and maintain interest. |  |  |
| 1. That equipment needs to be fit for purpose and meets the course requirements. This must include any Personal Protective Equipment (PPE). |  |  |
| 1. That programme content must be pitched at the right level and presented in a logical order. |  |  |
| 1. The site should be adequate for the programme and have appropriate facilities and provision. |  |  |
| 1. Assessments for risk must meet legislative requirements and be set down to cover all aspects. Copies to be retained and circulated as required. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 3 - Monitor and Evaluate the Establishment of Planted Areas**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Select monitoring methods which are appropriate to the site and plan. |  |  |
| 1. Monitor the establishment of the planted area at suitable intervals to assess progress. |  |  |
| 1. Take the appropriate remedial action when monitoring reveals issues to be dealt with. |  |  |
| 1. Evaluate the establishment to assist with future decision making. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. The type of establishment plan and what it hopes to achieve. |  |  |
| 1. The different types of planting there may be and the establishment needs for each. |  |  |
| 1. Time scales appropriate for establishment of different types of planting. |  |  |
| 1. The different purposes of land use and the impact this may have on the surrounding area. |  |  |
| 1. Methods of monitoring and evaluating planting establishment. |  |  |
| 1. Methods of determining the success of establishment. |  |  |
| 1. Remedial action to support establishment. |  |  |
| 1. Methods of monitoring the environmental impact of establishment. |  |  |
| 1. The best times for monitoring given the areas to be established and those implementing the plan. |  |  |
| 1. How best to evaluate the results, taking into account:-    * working methods; resource use; time scales and    * intervention to support establishment. |  |  |
| 1. Likely causes of deviation from plans. |  |  |
| 1. How to assess the importance of changes in plans and the actions to take. |  |  |
| 1. Organisational health and safety policy and your responsibility. |  |  |
| 1. Possible unforeseen circumstances and the action to take. |  |  |
| 1. The limits of your skill and authority. |  |  |
| 1. Health and safety requirements of the work. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 4 - Gather Data on the Characteristics of Sites**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Accurately ascertain what information the site assessment will produce. |  |  |
| 1. Identify your own roles and responsibilities with regard to site assessment and the relationship to others. |  |  |
| 1. Collect data using methods which are suitable for the area and appropriate to the needs. |  |  |
| 1. Carry out data collection methods correctly. |  |  |
| 1. Confirm the collected data is valid and reliable. |  |  |
| 1. Seek advice as appropriate if required. |  |  |
| 1. Carry out assessment and data collection in a way which minimises any possible site damage. |  |  |
| 1. Ensure that working methods are consistent with Health and Safety requirements and Industry Best Practice. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. The information which the assessment aims to produce in relation to –  * physical environment; social, cultural and aesthetic characteristics; and * the related infrastructure. |  |  |
| 1. The nature and characteristics of the flora, fauna, landscape and historical features which may occur on the site in order to identify them and recognise signs of change. |  |  |
| 1. The impact of access and recreation. |  |  |
| 1. How to confirm your own role. |  |  |
| 1. Different collection methods available and the advantages and disadvantages. |  |  |
| 1. How to implement the methods being used. |  |  |
| 1. Why different methods are used on different occasions and on different sites. |  |  |
| 1. Techniques of counting and estimating. |  |  |
| 1. The meaning of reliable and valid data and how to evaluate it. |  |  |
| 1. Methods of recording data being collected. |  |  |
| 1. Possible sources of error in data collection. |  |  |
| 1. Why and when to seek advice when there are issues with data collection. |  |  |
| 1. Issues which may affect the assessment and the site itself. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 5 – Identify and Report the Presence of Pests, Diseases and Disorders**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Ensure your working methods and practices maintain health and safety, and are consistent with relevant legislation and codes of practice. |  |  |
| 1. Monitor the crop(s) in accordance with production requirements. |  |  |
| 1. Correctly identify the presence of pests, diseases and disorders. |  |  |
| 1. Correctly identify the presence of any biological controls in use and beneficial insects. |  |  |
| 1. Establish the extent of the pest population, disease and any disorders. |  |  |
| 1. Promptly report the presence and extent of pests, diseases and disorders to the appropriate person. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Working methods which maintain the health and safety of yourself and others. |  |  |
| 1. Health and safety risks in monitoring pests, diseases and disorders. |  |  |
| 1. Workplace policies and procedures relating to the identification and reporting of pests, diseases and disorders. |  |  |
| 1. Your responsibility under health and safety legislation. |  |  |
| 1. Your responsibility under environmental and conservation legislation. |  |  |
| 1. Reasons for monitoring the crop. |  |  |
| 1. When to carry out crop monitoring i.e. frequency and regularity. |  |  |
| 1. Common types of pests, diseases and disorders. |  |  |
| 1. The problems caused by common pests, diseases and disorders to crop(s). |  |  |
| 1. Relevant biological control and beneficial insects as they apply to crops within your area of responsibility. |  |  |
| 1. To whom you should report the presence and extent of pests, diseases, disorders and biological control/beneficial insects. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 6 – Monitor and Maintain Tree Health**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Ascertain and use correctly your legal powers to inspect and monitor trees. |  |  |
| 1. Examine trees using appropriate techniques in order to arrive at a decision for future action. |  |  |
| 1. Communicate your decisions internally or to clients. |  |  |
| 1. Keep suitable records relating to inspection and monitoring. |  |  |
| 1. Ensure your actions comply with Health and Safety requirements and industry standards. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. The individual’s/organisation’s responsibility under relevant legislation to monitor and maintain a healthy tree stock. |  |  |
| 1. How to monitor trees in relation to type, age and location. |  |  |
| 1. How to select techniques and equipment to thoroughly assess tree health in accordance with current best practice. |  |  |
| 1. How to analyse data generated by tree monitoring equipment such as decay detection apparatus etc. |  |  |
| 1. How to present data to produce cogent reports which form the basis for further action. |  |  |
| 1. How to carry out monitoring systematically related to safety and organisational requirements. |  |  |
| 1. How to prioritise inspections based on target areas, risk to persons/property, and the tree age/type. |  |  |
| 1. How to identify trees and relate this to the implication of age classes. |  |  |
| 1. How to identify pests and diseases that affect trees and their implication for tree health. |  |  |
| 1. The process of ‘Visual Tree Assessment’ (VTA) and the recording of information obtained. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 7 - Administer Tree Protection Legislation**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Ensure you put in place procedures to deal with applications and enquiries. |  |  |
| 1. Keep records to identify the stages in the process. |  |  |
| 1. Seek appropriate permissions where inspections need to be carried out. |  |  |
| 1. Ensure procedures follow the required timescales for implementation. |  |  |
| 1. Liaise with other sections, colleagues and authorities as necessary. |  |  |
| 1. Ensure documentation meets the necessary statutory requirements. |  |  |
| 1. Deal with appeals according to statutory requirements. |  |  |
| 1. Deal with applications to undertake work within the required timescales. |  |  |
| 1. Seek advice and support where necessary. |  |  |
| 1. Ensure your actions comply with Health and Safety requirements and industry standards. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. The need to have a systematic process for dealing with TPOs, Conservation Area orders, Felling Licences etc. |  |  |
| 1. The importance of recording actions taken and storing the information. |  |  |
| 1. The importance of arranging for access to sites in order to carry out the operation. |  |  |
| 1. The timescales applying to the administration of the legislation. |  |  |
| 1. The need to involve Officers and Govt. Departments as well as NGOs, as appropriate to the legislation. |  |  |
| 1. The importance of completing documents to meet the legislative requirements. |  |  |
| 1. That the systems for lodging appeals or seeking compensation are identified according to legislation. |  |  |
| 1. The timescales involved in administering and processing the documentation. |  |  |
| 1. That advice can be sought if required to clarify areas. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 8 – Manage Veteran Trees**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Maintain the health and safety of yourself and others. |  |  |
| 1. Identify opportunities and constraints relevant to veteran tree management. |  |  |
| 1. Take into account issues regarding the site, the trees, public access and the setting. |  |  |
| 1. Evaluate the potential of the tree as a veteran and its ecological benefits. |  |  |
| 1. Identify resources to enable management and monitoring. |  |  |
| 1. Produce plans which contain information to allow implementation. |  |  |
| 1. Monitor the plan throughout its timescale. |  |  |
| 1. Ensure your actions comply with health and safety and industry best practice. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. The health and safety issues relating to carrying out operations on veteran trees to ensure site and public safety including access to the area. |  |  |
| 1. The trees which would be suitable as veterans taking into account species, growth habit, rarity, locality etc. |  |  |
| 1. The legal issues relating to potentially dangerous trees and the likelihood of harming or preventing enjoyment including ‘Occupier’s Liability’ legislation. |  |  |
| 1. The value of veteran trees for conservation, especially for bats, insects, nesting birds and lichen. |  |  |
| 1. Systems for managing and monitoring including regular inspections and possibly ecological enhancement including coronet cuts, wound areas and niche habitats. |  |  |
| 1. The requirement for recording work done and the regular monitoring. |  |  |
| 1. Working methods and waste disposal which minimise site disturbance. |  |  |
| 1. Production of plans to implement and control the retention of veteran trees on public or private sites (including those open by invitation). |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 9 – Select and Transport Large Root-balled Trees**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Identify a tree that meets design requirements. |  |  |
| 1. Make sure the tree is in a fit condition for transportation and establishment. |  |  |
| 1. Prepare the tree for transportation. |  |  |
| 1. Select a safe and effective route. |  |  |
| 1. Transport the tree in a way that is safe and secure and in accordance with highway and traffic regulations. |  |  |
| 1. Maintain the health, vigour and physical condition of the tree during the journey. |  |  |
| 1. Identify and deal correctly with any hazards during transportation. |  |  |
| 1. Maintain the health and safety of yourself and others at all times. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. How to identify a range of different trees appropriate to the needs of your customers and your organisation. |  |  |
| 1. How to check the condition of these trees to ensure they are fit for transportation and establishment. |  |  |
| 1. The effects of transportation on trees and how to prepare them for transportation and maintain their condition throughout. |  |  |
| 1. How to secure and transport trees. |  |  |
| 1. Relevant highway and traffic regulations. |  |  |
| 1. The signs that a tree may be suffering stress during transportation and how to respond to these signs. |  |  |
| 1. How to maintain the health and safety of yourself and others. |  |  |
| 1. The types of hazards that may occur when transporting trees and how to deal with these correctly. |  |  |

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| **Signed by:** | | | |  |
| Applicant: |  | Date: |  |  |
| Assessor: |  | Date: |  |  |
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**ELEMENT 10 – Prepare for, and Agree, Emergency Arboricultural Operations**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Prepare emergency call out vehicle and equipment prior to and in anticipation of a call out. |  |  |
| 1. Assess the risks associated with the site and install suitable controls. |  |  |
| 1. Assess the site for evidence of both underground and overhead utilities and assess the risk regarding possible fracture to wayleaves. |  |  |
| 1. Agree the lines of command on site. |  |  |
| 1. Establish an emergency plan and methods of work appropriate for the site and situation with particularl emphasis on night time operations including the arrangement of onsite illuminations. |  |  |
| 1. Establish a communication system which meets health and safety and site requirements with all the team and particularly with the responsible officer (emergency services). |  |  |
| 1. Ensure appropriate traffic management systems to protect emergency arboriculture team members, other users of the site and the public, are in place. |  |  |
| 1. Ensure that the emergency services have taken necessary action prior to undertaking arboricultural operations. |  |  |

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| What you must know and understand: | Portfolio  Reference No | For Assessor’s Use Only |
| 1. The importance of urgency and that to preserve or protect human life is paramount in terms of speed of rescue whilst safeguarding yourself and others. |  |  |
| 1. How to identify appropriate personal protective equipment, equipment and tools for emergency arboricultural operations and prepare and store in vehicle prior to any emergency. |  |  |
| 1. How to identify hazards and assess risks associated with emergency arboricultural operations. |  |  |
| 1. How to identify the presence and significance of utilities. |  |  |
| 1. How to establish emergency plans and methods of work. |  |  |
| 1. How to secure sites for safe and effective working including the correct location and positioning of warning signs and access controls. |  |  |
| 1. How to initiate and maintain effective communication systems and methods of work to ensure onsite safety of arboricultural personnel. |  |  |
| 1. How to effectively and safely use onsite lighting. |  |  |

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| Assessor: |  | Date: |  |  |
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**ELEMENT 11 - Monitor and Control the Use of Resources**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Communicate effectively the contribution each individual can make in the control of resources. |  |  |
| 1. Ensure that the expenditure is within agreed budgets, does not compromise future spending and conforms to organisational requirements. |  |  |
| 1. Refer promptly requests for expenditure outside your responsibility. |  |  |
| 1. Ensure that records are complete, accurate and legible. |  |  |
| 1. Pass on recommendations for improving operational efficiency with the minimum of delay. |  |  |
| 1. Assess and correctly interpret information on costs and resource utilisation and take effective action. |  |  |
| 1. Take prompt corrective action in response to actual or potential deviation from plans. |  |  |
| 1. Ensure your actions comply with Health and Safety and Industry Best Practice. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. How to monitor resource utilisation and costs and analyse efficiency and effectiveness. |  |  |
| 1. How to use tools for financial and cost benefit analysis to monitor utilisation. |  |  |
| 1. How to motivate staff to contribute to the efficient control of resources and costs. |  |  |

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**ELEMENT 12 – Co-ordinate Activities, Resources and Plans**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Monitor and evaluate project work in a way which is consistent with agreed plans. |  |  |
| 1. Accurately measure progress against plans and identify emerging risks, difficulties and their causes. |  |  |
| 1. Obtain clear authorisation for all stages of work to start, continue or finish. |  |  |
| 1. Clearly inform (if appropriate) your higher level manager of any emerging issues, to enable remedial action to be taken. |  |  |
| 1. Keep activities and resources in line with plans or seek approval for any amendments as appropriate. |  |  |
| 1. Recommend changes in projects or activities in a way which minimises disruption. |  |  |
| 1. Make any adjustments to activities etc. with the knowledge and agreement of the team and keep records accordingly. |  |  |
| 1. Inform as necessary if it is required to change the scope of the project. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. How to identify and assess emerging issues. |  |  |
| 1. The importance of minimising disruption during changes and how to manage the change. |  |  |
| 1. Awareness of different project management methods and their possible application. |  |  |
| 1. Methods to monitor and evaluate project progress. |  |  |
| 1. The importance of obtaining authorisation for all stages of the work. |  |  |
| 1. Why activities need to be kept in line with the plans and methods to ensure this. |  |  |
| 1. Why resources need to be tightly monitored and methods to achieve this. |  |  |
| 1. Why senior staff need to be kept informed of any implications for a project. |  |  |
| 1. Why you should have a consensus of team members for any significant changes. |  |  |
| 1. Who need to be consulted on changes. |  |  |
| 1. How to negotiate adjustment to everyone’s satisfaction. |  |  |

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**ELEMENT 13 – Monitor and Maintain the Health, Safety and Security of the Workplace**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Maintain the safety and security of the working environment in accordance with relevant legal and organisational requirements. |  |  |
| 1. Review existing risk assessments for routine work activities. |  |  |
| 1. Assess the risks involved prior to undertaking new or non-routine work activities, recommend control measures and ensure agreed measures are applied. |  |  |
| 1. Select and apply the correct measures to control risk from routine work activities. |  |  |
| 1. Communicate any health and safety precautions that are being applied in the workplace to others entering the area. |  |  |
| 1. Use equipment and materials correctly according to relevant legislation and organisational requirements. |  |  |
| 1. Manage waste correctly in accordance with relevant legal and organisational requirements. |  |  |
| 1. Follow standard procedures for personal hygiene at all times. |  |  |
| 1. Implement safety procedures safely, correctly and without delay in an emergency situation. |  |  |
| 1. Keep health, safety and security records which are accurate, legible and complete. |  |  |
| 1. Perform work activities in a manner which minimises environmental damage. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Your legal and organisational responsibility in relation to health, safety and security. |  |  |
| 1. The difference between ‘hazard’ and ‘risk’ and how to assess risk. |  |  |
| 1. The hierarchy of measures to control risks (including elimination, substitution, relevant engineering controls, safe systems of work, training/instruction and personal protective equipment). |  |  |
| 1. The risks which arise from routine work activities and the measures to control them. |  |  |
| 1. The importance of assessing risks from new and non-routine work activities. |  |  |
| 1. The need to communicate health and safety precautions to others entering the area. |  |  |
| 1. Safe methods of using and storing equipment and materials. |  |  |
| 1. How hazardous and non-hazardous waste should be managed. |  |  |
| 1. Security issues associated with the workplace and what actions to take. |  |  |
| 1. The relationship of extinguisher to fire type (electrical, chemical, combustible material). |  |  |
| 1. Procedures for different types of emergencies relevant to the industry in which you are working. |  |  |

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**ELEMENT 14 – Manage Cash Flow of the Business**

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Set cash flow targets that are in line with your plans. |  |  |
| 1. Identify where cash comes from and how its monitoring is carried out. |  |  |
| 1. Control sources and use of cash as appropriate. |  |  |
| 1. Produce cash flow forecasts at times suitable for the business needs. |  |  |
| 1. Accurately forecast cash shortfalls and plan what actions to take. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. How to prepare and understand cash flow forecasts and statements. |  |  |
| 1. How to monitor cash flow and understand bank statements. |  |  |
| 1. How to control use of cash by keeping debts to a minimum, managing payments, buying and selling assets etc. |  |  |
| 1. How the timing of receipts and spending affects cash flow. |  |  |
| 1. How not meeting targets can affect cash flow and subsequently payments, penalties, breach of contract etc. |  |  |
| 1. How to choose the most useful timescales for financial forecasts. |  |  |
| 1. Who can provide financial advice and their possible attachment to a particular company. |  |  |

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ELEMENT 15 – Manage Your Own Resources and Professional Development

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| What you must be able to do: | Portfolio Reference No | For Assessor’s Use Only |
| 1. Evaluate at intervals the current and future requirements of your work role, taking account of the objectives of the organisation. |  |  |
| 1. Consider your values and your career and personal goals and identify information relevant to your professional development. |  |  |
| 1. Discuss or plan personal work objectives and decide how you will measure progress. |  |  |
| 1. Identify the learning styles which work for you and take this into account in your development activities. |  |  |
| 1. Identify possible gaps in your current and future work in relation to your present knowledge and skills. |  |  |
| 1. Agree/formulate a development plan to address any gaps in your knowledge and skills. |  |  |
| 1. Undertake the identified action and evaluate its contribution. |  |  |
| 1. Review and update your objectives and personal development plan in the light of performance. |  |  |
| 1. Obtain regular feedback from your peers to assess progress. |  |  |
| 1. Ensure your performance meets or goes beyond understood requirements. |  |  |

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| What you must know and understand: | Portfolio Reference No | For Assessor’s Use Only |
| 1. The principles which underpin professional development. |  |  |
| 1. The importance of considering your values and personal and career goals and relating them to your job and professional development. |  |  |
| 1. How to evaluate the current requirements of a work role and how these may evolve in the future. |  |  |
| 1. How to set (SMART) objectives: those which are specific, measurable, achievable, realistic and time bound. |  |  |
| 1. How to identify development needs between your current skills and the requirements of your work role. |  |  |
| 1. What an effective development plan should contain and the length of time it should cover. |  |  |
| 1. The range of different learning styles and identifying which suits you best. |  |  |
| 1. The type of development activities which can be undertaken to address knowledge or skill gaps. |  |  |
| 1. How to identify whether development activities have contributed to your performance. |  |  |
| 1. How to update work objectives and development plans in the light of performance, feedback received and any wider changes. |  |  |
| 1. How to monitor the quality of your work and your progress against requirements and plans. |  |  |

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