Institute of Chartered Foresters

Professional Membership Entry Guidance Notes

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1. Introduction

Membership of the Institute of Chartered Foresters affords international respect and recognition from peers, senior colleagues, clients, stakeholders and members of the public. The Institute requires members who will actively contribute to the development of forestry and arboriculture. In order to represent the profession effectively it is important all Associate members progress to professional membership of the Institute in due course.

Whether building your business or advancing your career, becoming a Professional Member will underline your credentials, broaden your knowledge and deliver a clear competitive advantage. The Institute of Chartered Foresters is the only Royal Chartered body that can award Chartered Arboriculturist or Chartered Forester status – designations protected by law – to arboriculture and forestry professionals working in the UK.

Professional Membership Entry (PME) is the standard route to chartered status. The route should be undertaken by individuals who:

- have recently embarked on their careers and are accumulating professional, managerial experience in arboriculture, forestry or related disciplines
- are establishing and advancing their career and wish to demonstrate professional credibility
- may have worked in the sector for some time but have not yet undertaken the chartered process, despite holding a suitable qualification in addition to satisfactory professional experience

PME is open to all Associate members who have obtained a minimum of 10 qualifying points through a combination of academic qualifications, structured professional development and relevant professional experience.

PME is an evaluation of your competency, your experience and your understanding of the role and responsibilities of a professional. **PME is not a test of your arboriculture or forestry knowledge.**

PME is comprised of the following components:

- **The Career Profile** – a demonstration of understanding of professional development as outlined in an extended curriculum vitae
- **The Work Record** – a verified record of work experience against a range of defined Competency Areas, over a period of not less than two years
- **The CPD Record** – a record of activities outside the work place (Continued Personal Development) which could further professionalism
- **The Critical Analysis** – a written account of a challenging work-based situation in which you are able to demonstrate how you feel you have developed as a professional
- **The E-Learning module** – an online learning resource that will challenge you to consider elements of professionalism in areas of arboriculture and forestry pertinent to you
- **The Professional Interview** – an interview based upon the Work Record, Critical Analysis and Career Profile in order to establish your ability, skills and competence

In combination, these components are designed to assess whether you have taken responsibility for developing your professionalism and have reached the standard expected of a Chartered Arboriculturist or Chartered Forester.

The assessment is carried out by trained assessors and overseen by the Institute's Examinations Board, under the guidance of the Professional & Educational Standards Committee (PESC). Assessors are appointed from a pool of Chartered members, matched as closely as possible to your Competency Areas. The process is independently monitored by Moderators appointed by the Institute's Council.

All applicants[1] are strongly urged to read these guidance notes in full and to pay particular attention to the section on the Critical Analysis, which will involve careful thought, planning and ample time for reflection. Questions should be addressed, in the first instance to the Member Services Team by emailing icf@charteredforesters.org or by calling 0131 240 1425.

2. Eligibility for PME

PME is open to all Associate members who have obtained a minimum of 10 qualifying points through a combination of academic qualifications, structured professional development and relevant professional experience.

The qualifying points total is made up of points given for academic qualifications (a minimum of four academic points is required) and points given for each year of relevant work experience (a minimum of two years is required).

The Institute does not distinguish between full-time, part-time or distance learning courses – points are based on the final qualification. An applicant may accumulate qualifying points if they possess more than one distinct qualification, but not from integrated qualifications within the same degree (e.g. an Ordinary Degree and Honours Degree in the same subject). No applicant may exceed a total of eight qualifying points from academic qualifications. There is always a requirement to gain two qualifying points from relevant work experience.

The number of points awarded to accredited academic qualifications is reviewed regularly by the Institute's Professional & Educational Standards Committee. Some qualifications are guaranteed a minimum number of qualifying points (see Table 1).

[1] 'Applicant' is the term used to denote an individual embarking on the Professional Membership Entry (PME) process.

National Qualifications Framework[2]	Scottish Credit and Qualifications Framework[3]	Examples of Applicable Qualifications	Qualifying Points
Level 6	10	Any Honours degree (irrespective of the subject)	**4 points**
Level 6	9	Level 6 Professional Diploma in Arboriculture, any Ordinary degree (irrespective of the subject)	**3 points**
Level 5	8	Professional Development Award in Forestry (Scottish School of Forestry), University Certificate in Forestry (top-up), any HND (irrespective of the subject), any FdSc (irrespective of the subject)	**2 points**
Level 4	7	Any HNC (irrespective of the subject), any BTEC Advanced Professional Diploma (irrespective of the subject),	**1 point**

Table 1. Institute of Chartered Foresters membership composition and growth 2013-2022.

Individuals who possess a qualification that is not accredited will be assessed on an individual basis, through a self-assessment form to determine the number of points their qualification provides.

Eligibility to present for PME should not be an issue for applicants. Typically, the secretariat will write to an applicant within six weeks of joining as an Associate member to detail eligibility based on the information provided by an applicant in the Associate member application form.

Further information regarding PME qualifying points can be found on the Institute's website - https://www.charteredforesters.org/what-we-do/education-careers and in Appendix 1 of this document.

3. Career Profile

The Career Profile is not an assessed part of the PME submission but is used to guide the Professional Interview should you be invited to attend one.

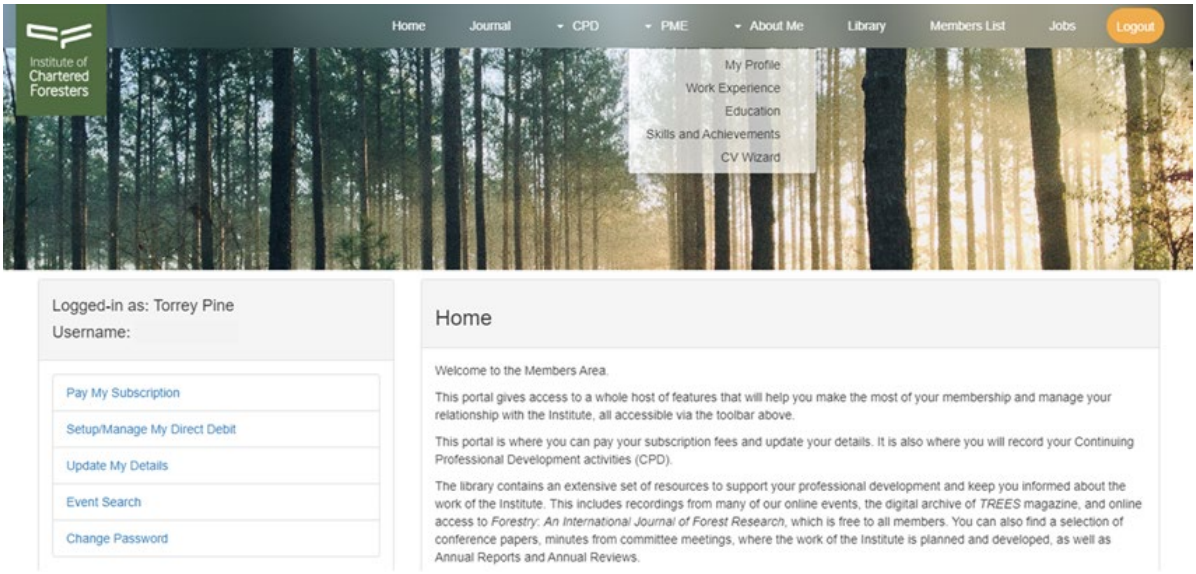
[2] Framework for Higher Education qualifications in England, Wales and Northern Ireland. https://www.gov.uk/what-different-qualification-levels-mean

[3] The Scottish Credit and Qualifications Framework. https://scqf.org.uk/

Assessors can only consider the information you provide. Therefore, it is important that applicants record voluntary positions in addition to salaried positions. Do not assume that assessors will have knowledge of extra-curricular activities and involvement with the Institute, or insight into your motivations for wishing to obtain chartered status, unless you have documented these activities in your Career Profile.

You should summarise how you are developing your competency base and your career progression towards the goal of chartered status.

Applicants must complete all the relevant sections – My Profile, Work Experience, Education, Skills and Achievements – in the **About Me** section of the Members' Area, and use the CV Wizard to create a personal curriculum vitae for inclusion in the PME submission.



4. The Work Record

The arboriculture and forestry professions encompass many different skills , or competencies, and no single professional is expected to be competent in all of them. However, the Institute does expect that an adequate range of related experience will have been obtained by all applicants wishing to achieve chartered status. This experience will demonstrate the application of the professional standards enshrined in the Institute's Code of Conduct.

The purpose of the Work Record is to provide evidence of your competency to practice as a Professional Member of the Institute in the area of the profession in which you are actively engaged. As your career progresses, you will be required to undertake appropriate continuous professional development (CPD) to maintain your knowledge and skills and to develop these to support any moves into new areas of the profession.

For the purposes of demonstrating professional competence, the Institute has defined thirteen Competency Areas, each encompassing a series of component Competencies against which you are required to record your work until you meet or exceed the requirements outlined below.

You are also expected to understand the limitations of your competencies so that you are able to abide by the Institute's Professional Code of Conduct, in particular Standard 2 – "Always provide a high standard of service" which states that you must:

"Act within your scope of competence. If it appears that services are required outside that scope then be prepared to do something about it. For example, make it known to your client, obtain expert input or consultation, or if it's the case that you are unable to meet the service requirements, explain that you are not best placed to act for the client."

You can start recording your Work Record at any time. However, it is important to realise that the submission deadline for PME each year is 1 August. You must plan to allow sufficient time to build the Work Record in accordance with the instructions below.

The Institute recommends that you seek to record your work experience as you progress through your career. However, all or part of the Work Record can be entered retrospectively provided you have the necessary records, documentation and ability to have these entries verified. If you do not have a sufficiently detailed record of the tasks you have undertaken over the relevant period, you may find it difficult to meet the requirements of the Work Record.

You should also note that the further back you go, the harder it will be to remember your activities accurately and to get these records verified – you may not even be working within that Competency Area any longer. Competencies claimed in this way will, very likely, be challenged at the Professional Interview stage.

4.1 Recording work experience

Applicants create a Work Record by recording work experience online through a secure PME portal in the Members' Area of the Institute's website, found at **PME > Work Records** in the top menu.

In order that you can demonstrate professional competence, the Institute has defined thirteen **Competency Areas**, each containing a set of related **Competencies** (see Appendix 2).

Recording is done in hourly blocks of work experience matched against each competency until you have achieved the required total of 2,600 hours or more over a minimum of two years. It could take longer than two years, for example if you work part-time, have been on parental leave in the period covered, have worked reduced hours, or where you believe more time is needed to develop a balanced submission.

You may also record additional hours of work from more than two years ago to demonstrate additional relevant experience, where appropriate. However, you should seek to match the competency requirements of the submission within your most recent 2,600 hours of work and are advised against using historical experience as evidence of continued competency if it cannot be demonstrated through your current or most recent professional activities.

All applicants are required to record against **Competency Area 1: Business & Management Skills** and at least one other Competency Area. The majority of applicants present with two, three or four Competency Areas in total.

For **Competency Area 1: Business & Management Skills**, it is mandatory to record at least 500 hours across no less than 25% of the component Competencies.

To claim competency in any of the other areas, you must attribute at least 200 hours across no less than 25% of their component Competencies. Should the number of hours in any one Competency Area exceed 1,100 hours in total, this area will be regarded as a major competency. See Appendix 2 for full details of the Competency Areas and their component Competencies.

The exact mix of Competencies you record against will depend entirely on your personal work experience and will thus vary widely between applicants.

If you do not meet or exceed the required hours or competency coverage within an area, these hours will not count towards your total as they will not be deemed to demonstrate competency. Such records will be viewed as providing additional information that offer insight into the variety of your work. In some cases, such hours may be attributed to component Competencies within other Competency Areas, which may help applicants meet the requirements. For example, 'Adherence to Health and Safety' may be found in multiple areas – **1.21 Management and adherence to Health and Safety requirements**, **2.17 Adherence to Health and Safety requirements**, **3.21 Adherence to Health and Safety requirements** and **4.09 Management and adherence to Health and Safety requirements**.

To claim time against a Competency, you must have been actively involved in that particular activity or operation at a level that includes planning, performing, supervising, managing, reporting, studying through observation, or any combination of these.

Recording is done on an hourly basis, and you can enter up to 500 hours in each block of work experience (or block of evidence). A discrete block of work experience would normally cover 40–200 hours (a minimum of 25 and a maximum of 500 hours), but this very much depends on the nature of your work. We advise you to keep these blocks of evidence task-based and apply hours to each Competency demonstrated within the task as you work on it. You can attribute up to eight Competencies per block of evidence. Tasks that constitute more than eight Competencies should be divided into smaller, component tasks, allowing complete Competency coverage.

In some rare cases, it may be not be possible to break your work into discrete tasks, in which case you may treat a block as a unit of time, perhaps a month or year. Recording in this way is more difficult because multiple tasks will likely be undertaken over a period of time and will likely be replicated across projects. It may be difficult to keep such blocks of evidence within the eight Competency and 500-hour limits, which makes it difficult to fulfil the requirements of the Work Record. It can also make it difficult to clearly describe your working practices and may lead the assessors to infer that your experience lacks variety and breadth.

Therefore, you are strongly advised to keep your Work Record task-based wherever possible. This will help you give the assessors the best insight into your work and will enable you to clearly demonstrate how you approach the variety of tasks you undertake as an aspiring Professional Member of the Institute.

4.2 The selection of a Verifier and their obligation

Each completed block of evidence will require verification from a named Verifier (see Appendix 3).[4]

You are required to appoint an appropriate person (or persons) to verify your Work Records – the Verifier. Ideally this person will be either your line manager or someone who is a Chartered member of the Institute. However, a chartered member of a similar organisation (e.g. surveyors, landscape architects or accountants or other individuals of professional standing are also acceptable). The individual you appoint to verify each block of evidence must have appropriate oversight and knowledge of the work described so they can verify that your record is a true and accurate account of your work.

It is understood that there will be occasions where these conditions cannot be met in which case you must explain the difficulty and reasons for your choice when you register for PME with the **PME1: Registration Form**.

Consultants and sole traders, for example, may have difficulty in finding a Verifier for certain tasks. In these instances, it is acceptable for the applicant to ask a Chartered member of the Institute to verify these blocks of evidence. However, as this individual would be unlikely to have first-hand experience of the work described, the Institute would expect the Chartered member to perhaps meet with the applicant to discuss components of the Work Record. Equally, the Institute would expect the applicant to share appropriate evidence with the Chartered member in order to support the work record. The Member Services team may be able to provide assistance in identifying appropriate Chartered members if required.

There will also be occasions where it is advisable for you to use multiple Verifiers. For example, if you change job or intend to use clients as Verifiers.

You should enter the Verifier details in **PME > Verifiers** section of the Members' Area and ensure these details are kept up to date throughout the process.

Applicants are responsible for discussing their Work Record, including details recorded under personal development, with their Verifier prior to submitting them. To aid the Verifier, you are expected to produce relevant time-sheets, work diaries, registration papers for meetings or anything else that will back up your claims, if requested. It is understood that not every block of evidence will have supporting documentation, but all significant claims should be verifiable.

Once a block of evidence is completed it should be emailed to your Verifier for approval. You submit blocks of evidence through **PME > Verification** online. The Verifier will be emailed each block of evidence and will be asked to verify and comment. When this is done that block of evidence is closed and can no longer be modified.

If there is any doubt regarding the verification process relating to a particular applicant, the Institute's assessors may ask to see the evidence, or a sample of the evidence, submitted to the Verifier. In any case, the Institute reserves the right to communicate directly with the Verifier.

It is your responsibility to find an appropriate Verifier and to get his or her agreement to act in this capacity. The Verifier's role is crucial to the success of the PME process so it is important that you

[4] 'Verifier' is the term used to denote an individual verifying, to the best of their knowledge, the experience the applicant has detailed and claimed in the Work Record component of a PME submission.

and your Verifier understand the nature of this relationship. To assist in this process a guidance letter for Verifiers can be found in Appendix 3.

This letter must be passed to the proposed Verifier, fully discussed and his or her approval gained before the individual can be named as a Verifier.

Summary.

When recording blocks of work experience you should be aware of the following:

- An activity cannot be recorded twice, e.g. against a generic activity and its component parts.
- Recording should be detailed in hourly blocks of work experience against each Competency until you have achieved the required total of 2,600 hours or more over a minimum of two years.
- Over the total period of recording no less than 500 hours must be accumulated in **Competency Area 1. Business and Management Skills**.
- The remaining 2,100 hours can be distributed over one or more of the Competency Areas (recording only in **Competency Area 1. Business and Management Skills** is not acceptable).
- For a Competency Area to be registered in the final total it must contain a minimum of 200 hours.
- You should seek to show breadth of experience by recording hours in more than a quarter of the competencies listed in any claimed Competency Area.
- The records must be independently verified as true and accurate before being submitted to the Institute of Chartered Foresters.

5. Continued Personal Development

All Associate members must record time spent on 'Continued Personal Development' (CPD) outside day-to-day work. This obligation continues as a Chartered member at which point it will be referred to as 'Continuing Professional Development.'

CPD can involve participating in activities organised by the Institute (which you should endeavour to attend) in addition to time spent on other work-related activities, such as relevant training, consultations, literature reviews and any other activity considered contributory to your professional development.

As well as attending arboriculture or forestry meetings, personal development includes meetings or classes on related topics, such as wildlife, horticulture, business skills, IT and computing, or involvement in local community groups. A wide range of activities can be considered relevant if participation makes you not only a better arboriculturist or forester, but also better able to integrate your professional skills into wider society.

Some applicants experience difficulties in obtaining wide enough or balanced experience in the workplace, but we expect you to have sought to compensate for this, in part, with alternate activities, for example, shadowing a colleague involved in a different area of arboriculture or forestry.

The Institute actively supports the professional development of its members and there are now more than 200 hours of video content in the Members' Area Library. In addition, all members receive *TREES* magazine and can access the latest research and the enormous archive of background papers in *Forestry: An International Journal of Forest Research* – available for free via the Members' Area homepage.

You must record at least 66 hours of Continued Personal Development over the two-year period prior to submission. By the end of the first year as a Professional Member, you will be required to have recorded at least 100 hours of CPD over the preceding three years and then maintain a rolling three-year total of at least 100 hours by 31 December each year.

6. The Critical Analysis

6.1 What is the Critical Analysis?

The Critical Analysis is one of the most important means of demonstrating that you have acquired the professional competence expected of a Chartered Arboriculturist or Chartered Forester. **An inadequate or substandard Critical Analysis is the most common reason for applicants failing to reach the Professional Interview stage**. For this reason it is important that the Critical Analysis should be planned well in advance, ideally more than six months before submission, to allow sufficient time for writing, reflection and review.

The Critical Analysis is defined as,

"A written introspective examination and critique of some task or situation, or series of tasks or situations, in which the applicant has been involved."

You are required to describe a professional challenge you have faced at work, explain how you (or you and your colleagues) set about solving the problems identified, and provide a detailed analysis of the professional (as opposed to technical) lessons learned directly as a result of the topic under discussion.

Linking the lessons learned to the Institute's Code of Conduct should help keep the focus on professional rather than technical lessons.

Generally you will be expected to address the following questions in a Critical Analysis:

- **What was the challenge?** Briefly describe the situation, the problem encountered and the objectives set.
- **What was your role?** You are not expected to have been the manager or final decision-maker, but assessors need to know the extent to which you were involved in the decision-making process.
- **What were the possible solutions?** Identify and analyse the options which were available to you in order to achieve the objectives.
- **What solution was chosen and why?** Outline the process that led to your eventual course of action.
- **What happened?** Did the situation turn out as expected, and what were the reasons for any successes or failures?
- **What would you do next time?** Recommend, with reasons, how you would handle a similar situation in the future.
- **What did you gain from the experience?** What lessons did you come away with, particularly in relation to your professional development?

The descriptive material that addresses the first two questions should not occupy more than one-third of the completed Critical Analysis (no more than around 1,000 words). The remainder of the Critical Analysis should be an analytical examination of the options, solutions and results with appropriate deductions and recommendations. As a Critical Analysis, this piece of work is not simply a historical account. It must clearly demonstrate that you can identify and critically review the problems and possible solutions, otherwise it will not demonstrate the professionalism the assessors are looking for.

The Critical Analysis should demonstrate the required level of competence in:

- Written communication
- Data collection and handling
- Problem solving
- Reflective analysis
- Understanding of the role of the professional

6.2 Writing style

Whilst you may choose to write the Critical Analysis as though it was a report, avoiding the use of the first-person, you may find it more beneficial to compose in the first-person given the emphasis on personal professional development in this element of the assessment. Experience has shown that to best convey your role and understanding to assessors, writing all, or at least the last two-thirds, of the Critical Analysis in the first-person is recommended. This should help you focus on your involvement in the project as well as your responsibilities and the professional lessons you learned. Of course, using this approach does not mean that you do not acknowledge your sources of information or the contribution of others.

In writing your Critical Analysis you should keep in mind the audience – the assessors. The assessors will be professionals practising in the same general field as you, so do not write it as though it is intended for someone without an arboricultural or forestry background. Remember, the tone should remain formal and professional.

It should also be noted that a Critical Analysis is not merely an essay detailing a particular aspect of your job. Neither is it a technical report. **You should avoid lengthy descriptions of a technical nature and concentrate on those aspects that tested your professional skills, such as problem solving, conflict resolution and knowledge boundaries.**

6.3 Choice of subject

Choosing a suitable subject for your Critical Analysis can be difficult so start by discussing possible subjects with your colleagues and, if appropriate, with your Verifier. The subject you choose should be sufficiently complex to be open to critical analysis. If there is only one obvious solution, there would be no need to call on the advice of a professional. Subjects with too many key issues are best avoided, as they cannot be adequately examined in the space allowed. Examples of subjects submitted by previous applicants are given in Appendix 4.

In addition to analysing and recommending different options, you will be expected, where appropriate, to show that you have considered matters such as health and safety, legal implications, conflicts of interest, professional standards and the Institute's Code of Conduct.

The subject of your Critical Analysis should reflect the Competency Areas present in your PME submission. Applicants are strongly advised against presenting a Critical Analysis that heavily focuses on **Competency Area 1. Business and Management Skills.** While these Competencies may bear some relevance to your chosen topic, you are strongly advised to choose a topic for your Critical Analysis that falls more directly under the remit of one of your other claimed Competency Areas.

Remember the questions the Critical Analysis must address. If the topic can easily address these questions, then it will most likely be appropriate.

- What was the challenge?
- What was your role?
- What were the possible solutions?

- What solution was chosen and why?
- What happened?
- What would you do next time?
- What did you gain from the experience?

If the topic does not address these questions, or if you have to force it to fit, you would be advised to avoid this subject matter as a topic for your Critical Analysis and to consider an alternative.

6.4 Presentation

The final work should be a professional document without spelling mistakes or grammatical errors. It should feature a cover page and a table of contents. Pages should be numbered. Tables and diagrams should have descriptive labels and sources of information should be suitably referenced. You should also consider confidentiality and ensure that the permission of named individuals has been obtained or their identities disguised.

The Critical Analysis is your own work. It should not, therefore, be submitted using any logos or branding of your employer or the Institute.

Where possible, you should ask colleagues to proof drafts of your analysis and suggest ways of improving the descriptions or presentation and, where appropriate, to help ensure that it meets the brief.

The final work must be no fewer than 3,000 words and no more than 3,500 words in total, excluding any tables, figures, maps, photographs, bibliographies and appendices. In combination, this supplementary material should not cover more than five additional pages (single-sided).

A word count displayed on the document is generally appreciated by assessors.

Content submitted in excess of the upper word limit and beyond the limit for supplementary material will not be considered. Similarly, a submission that fails to reach the minimum requirement will be deemed incomplete.

Finally, the Institute requires that you send two hard copies of the Critical Analysis to our Edinburgh office by 1 August.

7. Professionalism in Arboriculture and Forestry

All members of the Institute of Chartered Foresters should have an understanding of the Code of Conduct. The Code of Conduct should be considered central to your professional life, not only as a source of ethical guidance, but also as a guide to the principles of good practice.

The completion of an E-Module on **Professionalism in Arboriculture and Forestry** is an integral part of the PME submission. The E-Module contains a number of important topics – including sections on Professionalism, the Code of Conduct, and Legal Proceedings. Following completion of these sections and the consolidation of your knowledge, you will be asked to submit a response to a hypothetical ethical dilemma. There are a number of ethical dilemmas and the one most suited for

discussion will depend upon the Competency Areas presented in your submission. In writing the response, applicants will be expected to describe the potential actions or behaviours were they in that situation. The free-text response, of no more than 800 words, will be assessed as part of the PME submission.

PME applicants will be given access to the eNet learning platform on 1 June and will have two months to complete the **Professionalism in Arboriculture and Forestry** E-Module, which will also be submitted on 1 August. Completion will demonstrate your understanding and professional application of the Institute's Code of Conduct.

Further details can be found in the Professionalism E-Module Guidance Notes.

8. The assessment of the PME submission

Following the submission deadline, the Chair of the Examinations Board will appoint two assessors to consider the submitted work. The assessors are drawn from a pool of Chartered members, trained in the role and where possible matched to the same general field as you with experience of the Competency Areas you have claimed. They will assess these against agreed standards of professionalism.

Following assessment of your submission, the assessors may decide against inviting you to attend a Professional Interview, if they believe that any concerns cannot be rectified at the Professional Interview. In this situation, the reasons for this decision will be explained and, if appropriate, you will be invited to submit again at a later date, taking the feedback from the Chair of the Examinations Board into account.

The recommendation to refer an applicant is seldom an easy decision for assessors. A referral has to be reached by the agreement of both assessors before it's passed to the Moderators for review. This ensures that the grounds for referral are concrete and fair. If your submission is referred, it has been referred by four of your peers. The same process is taken with a referral at the Professional Interview stage – both assessors have to agree and explain their decision-making process to the Moderators to ensure that the grounds for referral are reasonable, solid and fair.

If the assessors decide to invite you to attend a Professional Interview it does not necessarily imply that the submission is judged acceptable, but rather that it is thought that there is nothing that cannot be rectified or substantiated at interview.

Applicants invited to interview will be informed in early October. If you are being invited to attend an interview, information about the date and time of your interview will be included. Professional Interviews are arranged for dates in November and cannot be arranged for any other time. **Failure to attend at interview is regarded as a failed application.**

9. The Professional Interview

Professional Interviews are primarily held in November, in Edinburgh.

The Chair of the Examinations Board will appoint an interview panel of two assessors, chosen where possible to reflect your areas of competence. Normally at least one, if not both, of these interviewers will have been an assessor of your written PME submission. The Professional Interview will generally last approximately 45 minutes.

The purpose of the interview is to allow applicants to:

- correct or justify weak points in the PME submission
- elaborate and develop on the PME submission
- demonstrate a wider professional competence and awareness

Much of the questioning is based upon the assessors' comments on the written submission, particularly, but not solely, on the Critical Analysis. The questioning is designed to allow you to explain, develop and expand on the written submission and to give you the opportunity to demonstrate your wider professionalism as well as an understanding of the Institute's Code of Conduct.

The assessors will seek to establish that you have a wide knowledge of your subject, a comprehensive understanding of professionalism, and that you are being proactive in developing yourself as a professional. You will not be asked questions outside of your claimed areas of competency.

A Moderator will attend for part of most interviews but will not participate in the questioning. The Moderator's role is to ensure uniformity of assessment standards and, where requested, to provide advice to assessors over matters of procedure and interpretation.

The conclusion will be either that you are recommended for full chartered membership or that you are referred with the opportunity to re-present at a later date. In the latter case, the reasons you have been referred will be provided in writing. You may be asked to resubmit with a new Critical Analysis, an updated Work Record, or both.

Applicants will be notified of the outcome of their interview in writing before Christmas.

If, in the opinion of the assessors, an applicant has shown exceptional ability throughout the entire PME process, the Examinations Board may recommend that the applicant receives an award of distinction, the Hugh Miller Award for Excellence. The Hugh Miller Award for Excellence is not awarded every year.

10. Resubmission

A total of three PME submissions may be made over the 10 years permitted for Associate membership.

An applicant may be asked to resubmit with a new Critical Analysis, an updated Work Record, or both. Applicants who resubmit will be required to follow the PME timetable as before, unless instructed otherwise by the Examinations Board.

Applicants who have to resubmit will be required to pay the entire PME fees, unless instructed otherwise by the Examinations Board.

11. The right to appeal a decision

Referred applicants have the right to appeal the decision if it can be shown that there was an administrative error, or that the procedure was not in accordance with the Institute's regulations, or that insufficient attention was given to extenuating circumstances. Details of the appeal process can be found in Appendix 5 of this document.

12. Applicants with special needs

If you have dyslexia (or any other form of neurodivergence), disabilities or other special needs that might have a bearing on your performance during the PME process you should advise the secretariat in writing at the time of registering for PME (that is, when submitting the **PME1: Registration Form**). You may be asked to provide documentation to support your case.

It is the intention of the Institute to seek to accommodate any legitimate special needs of any applicant whenever and wherever possible.

Any extenuating circumstances affecting the progress of the PME submission must be notified in writing to the Chair of the Examinations Board. You may be asked to provide documentation supporting your case, which will be treated in confidence.

Any extenuating circumstances affecting your performance in the Professional Interview should be notified to the secretariat ahead of the Professional Interview or to the assessors at the time of the interview. Again, you may be asked subsequently to provide documentation supporting your case.

13. Timetable and fees

There are no right or wrong answers about where or when to begin the PME process, but most applicants normally approach a suitable Verifier and discuss their plans with this individual. Once a potential Verifier has been identified and agrees to act in this capacity, you should submit a completed **PME1: Registration Form** (available as a download from our website) in which you will register your name, address and other contact details, together with the name, contact details and professional position of your proposed Verifier. If you plan to use multiple Verifiers, it is only necessary to submit the details of one of them via the **PME1: Registration Form**. If the Institute has any concerns regarding your nominated Verifier, or your eligibility to present for PME, we will contact you about this.

A completed **PME1: Registration Form** may be submitted at any point throughout the year. However, a completed **PME1: Registration Form** must be submitted by 1 June in the year you wish to present. The completed **PME1: Registration Form** is returned to the secretariat together with payment of the first instalment of the examination fees (these are detailed on the Institute's website). The full examination fee may be paid at this time if this is preferable, but failure to pay at least the first instalment by 1 June will result in your application being delayed until the following year.

You must complete your PME submission (including your Career Profile, CPD Record, Work Record and Critical Analysis) and pay the second instalment of the examination fees by 1 August.

Please note that your online records are locked upon submission. You will no longer be able to edit or amend these records.

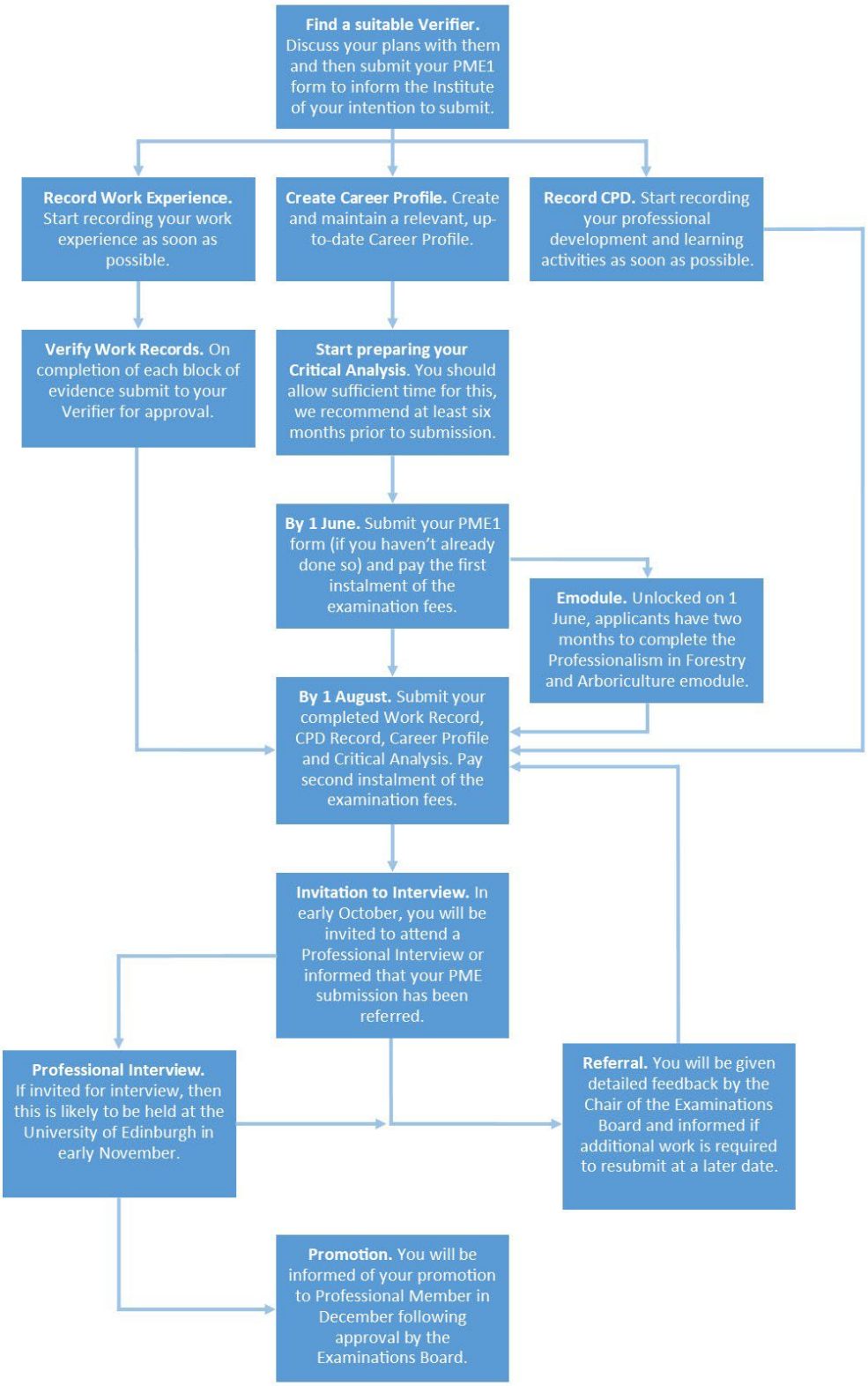
Your Critical Analysis must be uploaded to the Critical Analysis section of the PME platform in the Members' Area as a PDF document. **The maximum file size for uploading is 8MB.** Therefore, if you are uploading a PDF document, we recommend saving this as an optimized file, compressed to the minimum size for online use.

You must also submit two paper copies of your entire PME documentation, including your Critical Analysis. Both the paper copies of your submission and the second instalment of the examination fees must be received by no later than 5.00pm on 1 August.

Submissions that arrive after the deadline of 5.00pm on 1 August will not be considered. Similarly, if you fail to pay the second instalment of your fees by this date your submission will not be considered. If you need to be invoiced for the fees, please contact the Member Services Team with reasonable notice. Receipts for payment can be provided on request.

You will find full details about the examination fees for the current year on our website.

14.Summary: Outline of the PME process



APPENDIX 1: Current accredited courses

The following courses are accredited by the Institute of Chartered Foresters (information correct at 31 January 2023).

If you possess a qualification that is no longer taught or isn't currently accredited, please contact the Institute. The Institute maintains an archive of historic qualifications, which can be used to determine the number of qualifying points awarded.

Bangor University	BSc (Hons) in Forestry	8 points
	BSc (Hons) in Forestry – with placement year	8 points
	MFor in Forestry	8 points
	BSc (Hons) in Forestry and Environmental Management	7 points
	BSc (Hons) in Conservation with Forestry	6 points
	BSc (Hons) in Conservation with Forestry - with placement year	6 points
	MSc in Environmental Forestry	6 points
	MSc in Tropical Forestry (distance learning)	6 points
	MSc in Forestry (distance learning)	6 points[5]
	MSc in Agroforestry and Food Security	5 points
Harper Adams University	MSc in Forestry Management	6 points
	MSc in Conservation and Forest Protection	6 points
	BSc (Hons) in Countryside Management	5 points
	BSc (Hons) in Countryside and Environment Management	5 points
Myerscough College	BSc (Hons) in Arboriculture and Urban Forestry	8 points
	MSc in Arboriculture and Urban Forestry	6 points
	FdSc in Arboriculture	5 points
National School of Forestry	BSc (Hons) in Forest Management	8 points
	BSc (Hons) in Forest Management – with placement year	8 points
	BSc (Hons) in Woodland Ecology and Conservation	7 points
	BSc (Hons) in Woodland Ecology and Conservation – with placement year	6 points
	FdSc in Forestry	5 points
Scottish School of Forestry	BSc (Hons) in Forest Management (Forestry)	8 points[6]
	BSc (Hons) in Forest Management (Arboriculture and Urban Forestry)	7 points
	BSc (Ord) in Sustainable Forest Management with Forest Conservation	7 points
	BSc (Ord) in Sustainable Forest Management with Arboriculture	7 points
	HND in Forestry	5 points
	HND in Arboriculture and Urban Forestry	5 points
University of Aberdeen	MSc in Environmental and Forest Management	6 points
	Post-graduate Diploma in Environmental and Forest Management	5 points

[5] The MSc in Forestry (distance learning) from Bangor University may be awarded 5 or 6 points depending on the modules selected.

[6] The BSc (Hons) in Forest Management (Forestry) from the Scottish School of Forestry may be awarded 7 or 8 points depending on the modules selected.

APPENDIX 2: Competency Areas and Competencies

1. Business and Management Skills

1.01 Project Management (including planning and reporting)
1.02 Management of a work force
1.03 Human relations (job assessment, management of competencies etc.)
1.04 Developing teams and individuals, planning, and monitoring their performance
1.05 Budgets and cash flows, identifying and monitoring effective resource allocation
1.06 Preparation of accounts
1.07 Forestry taxation and assessment advice
1.08 Grant applications and advice
1.09 Costing, tendering
1.10 Negotiations (with clients, developers, purchasers etc.)
1.11 Financial analysis
1.12 Raising finance, money markets
1.13 Preparation of contracts
1.14 Supervision of contracts
1.15 Developing ICT skills and/or equipment
1.16 Planning research programmes
1.17 Curriculum development, time-tabling
1.18 Policy planning (other than under Competency Area 11)
1.19 Insurance aspects
1.20 Management systems including ISO and OHSAS
1.21 Management and adherence to Health and Safety requirements
1.22 Compliance with appropriate standards and regulations
1.23 Contributing to the formulation of strategy to guide the work of an organisation
1.24 Developing plans to assist with the implementations of an organisations strategy
1.25 Participation in reviews of the performance of an organisation
1.26 External consultancy and management reports
1.27 Monitoring service delivery to meet needs of clients and customers
1.28 Resolving ethical issues
1.29 Communication of information to meet the needs of clients, customers or public

2. Forestry and Woodland Management

2.01 Planning and design of forest planting schemes
2.02 Forest site preparation
2.03 Planting
2.04 Tree maintenance, including vegetation management
2.05 Forest nutrition and fertiliser use
2.06 Forest protection (insects, fungi, mammals, fire, etc.)
2.07 Selection and use of appropriate silvicultural systems
2.08 Establishment and management of natural regeneration
2.09 Soil, site and stand classifications and surveys
2.10 Volume and growth assessment
2.11 Thinning, felling and harvesting control
2.12 Preparation and up-dating of forest design plans
2.13 Compliance with appropriate forest management standards
2.14 Valuation of forests
2.15 Small and farm woodland design and management
2.16 Management of equipment and machinery
2.17 Adherence to Health and Safety requirements

2.18 Environmental Impact Assessments
2.19 Public liaison on forestry (unless under Competency Area 6)

3. Arboriculture and Urban Woodland Management

3.01 Planning and design of urban/parkland planting schemes
3.02 Site preparation
3.03 Planting in the urban/parkland environment
3.04 Plant maintenance, including vegetation management
3.05 Tree nutrition and fertiliser use
3.06 Tree protection (insects, fungi, mammals, vandals etc.)
3.07 Amenity woodland management (including natural regeneration)
3.08 Soil and site classifications and surveys
3.09 Tree inspections and hazard evaluation
3.10 Preparation and up-dating of tree management plans
3.11 Compliance with appropriate tree management standards
3.12 Management of TPOs and other designations
3.13 Valuation of amenity trees and woodlands
3.14 Investigation of tree-related structural damage
3.15 Pruning regimes and crown management
3.16 Line clearance and utility arboriculture
3.17 Management of trees on development sites
3.18 Management of veteran trees and/or historic landscapes
3.19 Management of equipment and machinery
3.20 Felling and removal of amenity trees
3.21 Adherence to Health and Safety requirements
3.22 Public liaison on arboriculture (unless under Competency Area 6)

4. Environment, Biodiversity and Wildlife Management

4.01 Environmental impact assessment and management
4.02 Landscape assessment and mapping (urban and rural)
4.03 Landscape design
4.04 Ecological and habitat assessment and mapping (urban and rural)
4.05 Measures to maintain or enhance biodiversity and sustainability
4.06 Wildlife management, planning and implementation
4.07 Production, processing and sale of venison and game
4.08 Firearm control and competencies
4.09 Management and adherence to Health and Safety requirements
4.10 Archaeology

5. Recreation Management and Planning

5.01 Assessment and mapping of recreation potential
5.02 Developing and implementing recreation plans
5.03 Tourism development and management
5.04 Hazard and risk assessment
5.05 Management for community safety
5.06 Management of recreation facilities
5.07 Management and adherence to Health and Safety requirements
5.08 Event planning and management
5.09 Access planning and interpretation
5.10 Path (cycle, bridle, foot) construction and maintenance
5.11 Environmental impact assessment and management

6. Public Consultation and Participation

6.01 Planning of consultation or participatory exercises
6.02 Liaison with public or statutory authorities
6.03 Liaison with NGOs and similar representational groups
6.04 Informal liaison with the general public
6.05 Liaison with neighbours
6.06 Liaison with formal local groupings
6.07 Management of volunteers
6.08 Environmental education for the public
6.09 Public attitude surveys
6.10 Other forms of community engagement

7. Tree Nursery Management

7.01 Nursery production planning
7.02 Soil cultivation, drainage and irrigation
7.03 Soil nutrition management
7.04 Sowing and seed bed management
7.05 Tending (transplanting, undercutting, wrenching etc)
7.06 Weed control
7.07 Hazard and risk assessment
7.08 Containers, filling and sowing
7.09 Greenhouse/polyhouse environment control
7.10 Marketing produce
7.11 Machine maintenance
7.12 Transport planning and management
7.13 Plant storage
7.14 Seed collection
7.15 Seed storage and preparation

8. Harvesting, Marketing and Utilisation

8.01 Planning and controlling harvesting operations
8.02 Sales/purchases of produce, planning and negotiation
8.03 Production of timber and non-wood products
8.04 Marketing of timber and non-wood products, including green waste
8.05 Quantification and valuation
8.06 Terrain classification
8.07 Hazard and risk assessment
8.08 Environmental impact assessment and management
8.09 Management of equipment and machinery
8.10 Produce transport planning and organisation
8.11 Site restoration
8.12 Chain of custody certification
8.13 Management and adherence to Health and Safety requirements

9. Forest Engineering

9.01 Road system planning
9.02 Road construction planning
9.03 Road construction and maintenance
9.04 Bridge construction and maintenance
9.05 Building construction and maintenance

9.06 Hazard and risk assessment
9.07 Environmental impact assessment and management
9.08 Management of equipment and machinery
9.09 Machine development (unless under Competency area 12)
9.10 Management and adherence to Health and Safety requirements

10 Timber Conversion

10.01 On-site timber conversion
10.02 Timber uplift and transport
10.03 Timber storage
10.04 Sawmilling operations
10.05 Production of engineered timber products
10.06 Pulp and paper production
10.07 Quality control
10.08 Project management
10.09 Hazard and risk assessment
10.10 Environmental impact assessment and management
10.11 Product development (unless under Competency Area 12)
10.12 Machine development (unless under Competency Area 12)
10.13 Marketing and market development
10.14 Value added processes
10.15 Management and adherence to Health and Safety requirements

11. Policy Development and strategic planning

11.01 Policy work at with governments at local, national or international levels
11.02 Meeting with policy makers (government, industry, professional etc.)
11.03 Meeting with policy implementers (industry, professional etc.)
11.04 Policy reviews
11.05 Best Value Review
11.06 Production of tree and woodland strategies
11.07 Production of Supplementary Planning Guidance document
11.08 Preparation of other relevant reports, submissions or publications
11.09 Participating in the formulation and implementation of policy
11.10 Development of forest certification and other sustainability initiatives

12. Forestry and Arboricultural Research

12.01 Silviculture
12.02 Arboriculture (except where other headings more apposite)
12.03 Mensuration and biometrics
12.04 Entomology
12.05 Pathology
12.06 Management
12.07 Statistics
12.08 Environment and biodiversity
12.09 Wildlife management
12.10 Nursery and tree production
12.11 Socio-economics
12.12 Archaeology and forest history
12.13 Machine/equipment development and assessment
12.14 Product development
12.15 Genetics, tree breeding, seed and relevant biotechnology

13 Forestry and Arboriculture Teaching

13.01 Silviculture
13.02 Arboriculture
13.03 Urban forestry
13.04 Mensuration and biometrics
13.05 Statistics (relevant to forestry or arboriculture)
13.06 Land-use planning
13.07 Forest management
13.08 Environment and biodiversity
13.09 Socio-economics
13.10 Landscape design
13.11 Business management (relevant to forestry or arboriculture)
13.12 Foundations of forestry/arboriculture (e.g. soil science, botany etc.)
13.13 Project planning (including preparation of management plans)
13.14 Field tours
13.15 Machine operation
13.16 Recreation and tourism

APPENDIX 3: Guidance for Verifiers

It is the responsibility of each applicant to find a Verifier and to get his or her agreement to act in this capacity. The Verifier's role is crucial to the success of the PME process, so it is important that both Verifier and applicant understand the nature of this relationship. To assist in this process a guidance letter for Verifiers has been produced by the Chair of the Examinations Board.

This letter must be passed to the proposed Verifier, fully discussed and his or her approval gained before the individual can be named as a Verifier.

Institute of Chartered Foresters

<Insert Addressee>
<Insert Address>
<Insert Postcode>
<Insert Town>

Dear <Insert Name>,

Verification Process for the Professional Membership Entry (PME) Assessment Process

The process you are being asked to assist with is essential for the maintenance of professional standards in forestry and arboriculture.

The Institute of Chartered Foresters is asking you to endorse, to the best of your knowledge, the experience that the applicant claims to have gained, both at work and in their personal development. This requires the applicant to look back over a period and provide you with sufficient evidence to support each claim they make in a particular competency. Such evidence may take the form of some combination of work diaries, time-sheets, written reports and a record of attendance at meetings and events. In short, whatever evidence is sufficient to enable you to endorse each submitted block of evidence in their Work Record.

To assist us in our assessment process, we ask that you verify the submission provided by the applicant detailing precisely the evidence produced to support their claims. We fully understand that no such set of documents can totally detail everything the applicant has been involved with, and we are certainly not asking you to spend time confirming details. Rather, we are looking for an assertion that you reasonably believe that the applicant is honest and trustworthy in claiming what they have recorded.

If you have no reason to disagree with the applicant's claims, please confirm this by completing the email you were sent. Where possible, please use the comments section to paint a fuller picture for the assessors who will review this submission.

If, for whatever reason, you feel unable to sign off the full claim, please inform the applicant and briefly explain the reason for your decision. It is then the applicant's responsibility to explain this to the Institute of Chartered Foresters. Should you feel that there are strong concerns about the applicant's honesty or professional competence, please contact the Institute immediately.

Applicants are also required to prepare a written Critical Analysis on some aspect of their work. If you feel competent to do so, it may be helpful to the applicant if they could discuss possible topics with you.

Exceptionally, the Institute may wish to contact you directly. We hope that this has your approval.

In the meantime, if you have any questions regarding the verification process or concerns about a submission you have been asked to verify, please do not hesitate to contact the Institute's Member Services Director, Dr Stuart Glen, on 0131 240 1425 or at stuart.glen@charteredforesters.org.

Our sincere thanks for your help in this important task.

Alex Murray MICFor

Chair of the Examinations Board
Institute of Chartered Foresters

Institute of Chartered Foresters
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59 George Street, Edinburgh EH2 2JG

Vat Reg No: 974 8753 57. OSCR Registered Charity No: SCO16033

APPENDIX 4: Examples of subjects for critical analyses

The following examples of topics used by previous applicants are offered merely to assist applicants when considering the subject of their proposed Critical Analysis. It in no way constitutes an approved list of subjects, and other subjects not covered here may be more suitable for your particular situation.

- A critical analysis of ancient semi-natural woodland management and restoration of plantations on ancient woodland sites on a mixed rural estate in the Midlands.
- A critical analysis of the consultation for urban community woodland creation.
- A critical analysis of the operational options to restore a plantation on ancient woodland site infected with *Dothistroma* (Red Band) Needle Blight.
- A critical analysis of the strategies undertaken to bring a SSSI woodland into positive management.
- Addressing the use of inappropriate ground preparation on a woodland creation site.
- An analysis of management regimes and their effect on windblow in the Welsh uplands.
- An analysis of the challenges faced and decisions made when objections were received in respect of timber harvesting operations.
- An analysis of the impact of development plans on veteran trees in an historic parkland landscape.
- An analysis of the impacts caused by the premature clearance of larch in the upper Irfon Forest, Powys, Wales, due to potential infection by *Phytophthora ramorum*, and the impact of private and public sector timber haulage on the rural community.
- An examination of the economic and practical options for individual tree protection on a disputed site.
- A review of operations and planning procedures to negate landslip risk within the Aultderg Gully.
- A review of specific protection measures required for an individual tree on a construction site.
- Between a road and a river – Clearfelling a small, but challenging woodland in South Scotland.
- Compliance with a statutory plant health notice and ensuring the delivery of client objectives.
- Creating wildlife infrastructure in Radnor Forest, Mid Wales.
- Creation of a Tree Management Strategy for Breckland Council.
- Critical analysis of a forest road Scottish Rural Development Programme grant claim.
- Critical analysis of the tree protection process during the phased upgrading of holiday accommodation units within a woodland holiday park.
- Critical examination of methods of putting a monetary value on amenity trees.
- Dealing with the *Phytophthora ramorum* outbreak in South West Scotland.
- Designing a short rotation forestry planting scheme.

- Determination of the fuel supply mix for a proposed biomass power plant, considering the optimum balance from a range of fuel sources.
- Determining the growth rate of trees in the urban environment.
- Elements of the Oak Processionary Moth control programme in Pangbourne, West Berkshire.
- Environmental Impact Assessment regulations: A barrier to woodland creation in England?
- Implications of logging in natural forests in a developing country.
- Investigation into tree harvesting adjacent to a Scheduled Ancient Monument.
- Investigation into unauthorised felling within a Tree Protection Order area.
- Land management options for heathland restoration in upland forest areas.
- Low ground pressure timber haulage: An economically viable alternative where stone quality limits forest road capacity.
- Management of a byway open to all traffic during forest operations.
- Management of a timber harvesting and marketing programme, with particular reference to developing relationships with customers and contractors, and improving quality control.
- Managing Sitka Spruce regeneration for woodland creation – Carron Valley Trial.
- Morenish Woodland creation: A study in the feasibility of implementing productive upland planting in 21st century Scotland.
- Production of a tender response for delivery of a large scale native woodland creation scheme.
- Provision of forestry advice to a windfarm developer.
- Removal of storm damaged roadside trees using explosive charges.
- Restocking at scale: A critical analysis.
- Retaining trees on development sites: Balancing the often conflicting objectives.
- Safeguarding Britain's green corridors.
- Small scale harvesting in the Midlands.
- SSSI's, accepting woodland management and including sycamore in the species mix.
- The effects of discovering a protected species on a harvesting site.
- The management of broadleaf elements of a woodland creation project.
- The management of young memorial woodland at first thin.
- Tree felling at Doncaster Racecourse: The use of legislation to secure a mutually beneficial outcome.
- Tree Risk Assessment – An evaluation of a project risks, costs and rewards.
- Vegetation surveys for utility management, the short-comings and benefits of different approaches.

APPENDIX 5: The appeal procedure

5.1 Principles

5.1.1 An appeal is permitted only in a situation where Professional Membership is denied and the applicant believes one of the following applies:

- That the assessors have given insufficient weight to extenuating circumstances
- That the applicant's performance was adversely affected by extenuating circumstances which the applicant, for good reason, was unable to make known to the assessors
- That there was, in the view of the applicant, a material administrative error at a stage in the assessment process, or that some material irregularities occurred
- That the assessment procedure was not conducted in accordance with the Institute's Regulations and Bylaws

5.1.2 Should you believe one of these instances arose then a written appeal should be lodged with the secretariat of the Institute of Chartered Foresters at 59 George Street, Edinburgh EH2 2JG within six weeks of notification of the referral.

5.2 The Appeal Board

5.2.1 Should the Chair of the Examinations Board believe there is any possibility for an appeal based on one of the principles outlined above, they will convene an Appeal Board. The Appeal Board will comprise:

- The Chair of the Examinations Board
- A Chartered member with experience of acting as an assessor but who has not previously assessed the applicant
- A Chartered member of the Institute who, at the time of the assessment under appeal, had no direct involvement in the Institute's entry procedures

5.2.2 No member of the Appeal Board will have a direct interest in the appellant's case. The powers of the Appeal Board are:

- To determine the validity of the grounds for the appeal (the appeal will not proceed if the Board does not deem the grounds of appeal to be valid)
- To uphold the appeal based on the evidence presented and to refer the matter back to the Examinations Board
- To turn down the appeal and to uphold the original decision of the assessors

5.2.3 The Appeal Board may seek a report on any aspect of the administrative arrangements for the Professional Membership examination from the secretariat of the Institute and on the conduct of the Professional Interview.

5.2.4 The Appeal Board will meet to determine the appeal before them. Their determination of the appeal will be based on the evidence before them.

5.2.5 In the event that the Appeal Board upholds an appeal, the Chairman of the Appeal Board will take immediate action to reconsider the appellant's Professional Membership examination result. The appellant will be advised of the form of this reconsideration within 14 days of the Appeal Board hearing.

5.2.6 The decision of the Appeal Board will be final.