Professional Membership Entry Guidance Notes

59 George Street, Edinburgh, EH2 2JG T: 0131 240 1425
E: info@charteredforesters.org W: www.charteredforesters.org
Registered Scottish Charity no. SC016033

Contents

1. Introduction 3
2. The Work Record 4
3. Continued Personal Development 6
4. The Critical Analysis 7
5. Career Profile 9
6. Assessment 10
7. The Professional Interview 10
8. Resubmission 11
9. Appealing a Decision 11
10. Applicants with Special Needs 11
11. Timetable and Fees 12
12. Summary: An outline of the PME process 13
Appendix 1: Competency Areas and Competencies 14
Appendix 2: Guidance for Verifiers 19
Appendix 3: Examples for subjects of critical analyses 20
Appendix 4: The appeal procedure 22

1. Introduction

Membership of the Institute of Chartered Foresters brings international respect and recognition from peers, senior colleagues and stakeholders. Whether building your business or advancing your career, obtaining Professional membership will underline your credentials, broaden your knowledge and deliver a clear competitive advantage. The Institute of Chartered Foresters is the only body that can award Chartered Forester or Chartered Arboriculturist status, a designation protected by law, to forestry and arboriculture professionals working in the UK.

Professional Membership Entry (PME) is the standard route to chartered status. It applies to individuals who,

- have recently embarked on their careers and are accumulating professional, managerial experience in arboriculture, forestry or related disciplines
- may have been in the business for some time but have not, for whatever reason, undertaken the Institute's professional examination

PME is open to all Associate members who have obtained a minimum of 10 qualifying points from academic qualifications and relevant professional experience. The total is made up of points for academic qualifications (a minimum of 4 points) and points for each year of relevant work experience (a minimum of 2 points). Points awarded to accredited academic qualifications are reviewed regularly by the Institute's Professional & Educational Standards Committee. We do not distinguish between full-time, part-time or distance learning options – points are based on the final qualification.

Individuals who wish to join the Institute of Chartered Foresters and 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 affords them.

Further information regarding PME qualifying points can be found on the Institute's website - https://www.charteredforesters.org/about-us/education-and-research/arboriculture-forestry-careers/

PME is based on an evaluation of your professional understanding and experience. It is not a test of your forestry or arboriculture knowledge. PME is comprised of the following components:

- **The Work Record** – a verified record of work experience 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 critique of some challenging aspect faced by you in your work experience
- **The Career Profile** – a demonstration of understanding of professional development as outlined in an extended curriculum vitae
- **The Professional Interview** – an interview based upon the work record, critical analysis and career profile in order to establish your ability, skills and knowledge

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

The assessment is carried out by assessors and overseen by the Institute of Chartered Foresters' Examinations Board, under the guidance of the Professional & Educational Standards Committee. Assessors are appointed from a pool of Chartered Members, matched as closely as possible to your competency areas and the process is independently monitored by a Moderator appointed by the President of the Institute.

The Institute urges all applicants[1] to read these guidance notes in full and to pay particular attention to the section on the critical analysis, which will require careful thought and preparation, well in advance of submission.

2. The Work Record

The practice of forestry or arboriculture requires many different skills, or competencies, and no one professional can be expected to embrace them all. However, the Institute does expect that an adequate range of related experience will have been obtained (both through employment and in personal time) by all applicants wishing to achieve chartered status. You are also expected to understand the limitations to your competencies so that you will be able to abide by the Institute's Professional Code of Conduct, in particular Regulation 28(B) 2, which states that,

"Know and act within your limitations. Be aware of the limits of your competence and do not be tempted to work beyond these. Only commit to what you can deliver."

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.

The Institute prefers you to record your work experience as you go along, in many ways this is easier. However, all or part of the work record can be entered retrospectively (up to two years) provided you have the necessary records, documentation and ability to have these entries verified.

2.1 Recording work experience

Members record work experience online through a secure recording platform available in the Members' Area of the website, entitled **My PME > Work Records**.

In order that you can demonstrate the skills learnt through relevant work experience, 13 **Competency Areas** have been defined by the Institute of Chartered Foresters, each containing many related **Competencies** (see Appendix 1).

You are required to record your work over a minimum period of two years against these competencies until you have achieved the required total of 2,600 hours or more. The Institute would expect you to record work in two or three, perhaps more, of the competency

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

areas. The exact mix recorded will obviously be wholly dependent on your own work experience. All applicants, however, must show that adequate experience has been gained in **'Competency Area 1. Business and Management Skills.'** A minimum of 500 hours in this competency area is expected by the Institute.

In order to claim time against a competency you need to have been actively involved in that particular activity or operation at a level which includes planning, performing, supervising, reporting, studying through observation, or any combination of these.

Recording is on an hourly basis (although you could enter as many as 500 hours in one go). We advise you to keep these records task-based and add hours as you work on each task. Normally a discrete block of work experience would cover 40-200 hours (minimum of 25 and a maximum of 500 hours), but it very much depends on the nature of your work. Blocks of work experience should represent discrete tasks. Sometimes this may be difficult, in which case a block can be a unit of time, perhaps a month or year. This approach, however, might suggest to the assessors that your work experience lacks the variety and breadth they expect.

Each completed block of recorded work experience will require to be verified by a named Verifier.

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

- An activity cannot be recorded twice, e.g. against a generic activity and its component parts.
- Recording should be 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. It could take longer, for example, if you work part-time or where you believe more time is needed to develop a balanced submission. 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 is not acceptable).
- For a competency area to be counted in the final total it must contain a minimum of 200 hours over the two years or more.
- 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.
- These records must be independently verified as true and accurate before being submitted to the Institute of Chartered Foresters.

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.

2.2 The selection of a Verifier and their obligation

The Institute of Chartered Foresters requires you to find an appropriate person to verify your work records, the Verifier. Ideally this person will be either your line manager or someone who is a Chartered Forester, or a member of a similar chartered organisation

(e.g. surveyor, landscape designer, engineer). Other individuals of professional standing are acceptable. It is important that the Verifier has appropriate access and knowledge of the work recorded.

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**. In addition, you should enter the Verifier details in **My PME > Verifiers** section of the Members Area and ensure these details are kept up to date.

Consultants and sole traders for example, on rare occasions may have difficulty in finding a Verifier to verify 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 the Chartered Member would have no first-hand experience of these tasks the Institute would expect the Chartered Member to 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.

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

Applicants are responsible for discussing their work records, 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 you are ready to have your work record verified, submit the blocks of evidence through **My PME > Verification** online. The Verifier will be emailed every block of recorded work experience and will be asked to verify and comment.

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 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 you and your Verifier understand the nature of this relationship. To assist in this process a guidance letter for Verifiers can be found in Appendix 2.

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.

3. Continued Personal Development

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

CPD includes time participating in activities organised by the Institute of Chartered Foresters (which you should endeavour to attend), as well as 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 forestry or arboriculture meetings, personal development includes meetings or classes on related aspects, such as wildlife, horticulture, business skills, IT and computing, even involvement in local community groups – a wide range of activities can be considered as relevant if participation makes you not only a better forester, arboriculturist or business manager, and better able to integrate these skills into wider society.

It is common for applicants to experience difficulties in obtaining wide enough or balanced experience at the work place but we expect you to have sought to, at least partly, compensate for this with alternate activities (for example, shadowing a colleague involved in a different area of forestry or arboriculture).

You must record at least 66 hours of Continued Personal Development over the two-year period prior to submission.

4. The Critical Analysis

4.1 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 Forester or Chartered Arboriculturist. **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 thought about well in advance, ideally more than six months before submission, to allow sufficient time for planning, 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."

In other words you are asked 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 detail the lessons you learned.

Generally you will be expected to address the following questions in a critical analysis:

- **What was the problem?** 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.
- **What were the possible solutions?** Identify and analyse the options which were (or might have been) available to you in order to achieve the objectives.
- **What solution was chosen and why?** Outline the process that led to your choice.
- **What happened?** Did it 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?

It is important that together the first two descriptive sections do not occupy more than one third of the completed critical analysis. Whist the first third (or less) of the critical analysis is descriptive, the rest should be an analytical examination of the options, solutions and results with appropriate deductions and recommendations. It is not a simple historical account, it is a *critical analysis*. Unless you show that you can identify, and critically review, the problems and possible solutions it will not demonstrate the professionalism being looked for by the assessors.

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

4.2 Writing style

You may choose to write the critical analysis as though it was a report, avoiding the use of the first person. However experience has shown that your role and understanding are best expressed by writing all, or at least the last two thirds, of the analysis in the first person. Of course, this rather more intimate style 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 that the reading audience – the assessors. The assessors will be professionals practising in the same general field as yourself, so do not write it as though it is intended for someone without a forestry or arboricultural background.

It should also be noted that a critical analysis is not merely an essay detailing a particular aspect of your job. 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.

4.3 Choice of subject

We know that this can be difficult so we urge you to start by discussing possible subjects with your colleagues and, if appropriate, your Verifier. What 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. This being said, subjects with too many key issues are best avoided, as they cannot be adequately examined in the

space we allow you. Examples of subjects submitted by previous applicants are given in Appendix 3.

As well as analysing, and recommending between, 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 Professional Code of Conduct.

The applicant is advised that subject of the Critical Analysis should reflect Competency Areas present in the PME submission. Applicants are advised not to present a critical analysis with a subject matter that focuses heavily on **'Competency Area 1. Business and Management Skills.'** A critical analysis focusing on the applicant's other Competency Area(s) is much preferred.

Remember the questions the critical analysis must address. If the topic can easily address these questions, then it may be appropriate,

- What was the problem?
- 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 critical analysis topic does not address these questions, if you have to force it to fit, then I would avoid this subject matter as a topic for your critical analysis and come up with another one.

4.4 Presentation

Naturally you will be striving to produce a thoroughly professional document without spelling mistakes or grammatical errors. The Institute requires that you send two well-presented and securely bound hard copies to our Head Office by 1 August. 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 particular individuals has been obtained or that their identities are disguised.

Where possible ask colleagues to read your drafts to suggest ways of improving the descriptions or presentation.

The final work should be between 3,000 and 3,500 words in length excluding any tables, figures, maps, photographs, bibliographies and appendices, although in combination these should not cover more than five pages.

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

5. Career Profile

The career profile is not an assessed part of the PME submission but rather designed to guide the professional interview should you be invited to attend one. Complete all the relevant sections online – My Profile, Work Experience, Skills & Achievements and Education in the **About Me** section.

Assessors can only assess and comment upon the information provided by you. It is imperative that you record voluntary positions as well as salaried positions. Do not assume that assessors will have knowledge of your extra-curricular activities and involvement with the Institute, unless you have documented these activities in the career profile.

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

You are encouraged to use the CV Wizard in the **Career Profile** section to create a personal curriculum vitae for inclusion in the PME submission.

6. Assessment

Following the submission deadline members of the Examinations Board will appoint two assessors to consider the submitted work. The assessors are drawn from a list of Chartered Members, trained in the role and where possible matched in the same general field as you and with experience of the competency areas claimed by you. They will assess these against agreed standards of professionalism. If either assessor has any doubts, or if there is a difference of opinion, the documents are submitted to a Moderator appointed by the President of the Institute for guidance in reaching a decision.

Following assessment of the PME submission the decision may be that more work is needed to make the critical analysis acceptable, or that further work experience is required, in which case you will be informed that you will not be invited for interview. The reasons for this decision will be explained and if appropriate, you will be invited to submit again at a later date.

More commonly, the assessors will decide to invite you to attend a professional interview. This 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. Such issues for discussion will be drawn to the attention of the interviewing assessors.

Applicants invited to interview will be **informed of this in early October.** Interviews are arranged for early November and cannot be arranged for any other time. **Failure to attend at interview is regarded as a failed application.**

7. The Professional Interview

Professional interviews are held in early November, in Edinburgh.

Members of the Examinations Board will appoint an interview panel of two Chartered Members, chosen where possible to reflect the special interests of you. Normally at least one of these will have been an assessor of your written submission. The Professional Interview generally lasts about 45 minutes.

The purpose of the interview is to allow applicants to:

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

Much of the questioning is based upon the assessors' comments on the written work, particularly, but not solely on the critical analysis. The questioning is designed to allow you to explain, develop and expand on the written submissions and to give you the opportunity to demonstrate your wider professionalism. You will not be asked questions outwith your competency areas and there are no 'trick' questions.

The Moderator will attend for a 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 the interviewers over matters of procedure and interpretation.

The conclusion will be either that you are recommended to the Institute of Chartered Foresters for full chartered membership (subject to approval by Council) or that you are referred, to try again at a later date. In the latter case the reasons you have been referred will be detailed in writing. You may be asked to resubmit with a new critical analysis, or a record of further work experience, or both.

Where, in the opinion of the assessors, an applicant has shown exceptional ability, the Examinations Board may recommend that Council award a distinction, the so-called Award of Excellence.

8. Resubmission

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

An applicant may be asked to resubmit with a new critical analysis, or a record of further work experience, or both.

Applicants that resubmit will be required to follow the PME timetable as before, unless instructed otherwise by the Examinations Board.

Applicants that have to resubmit will be required to pay the examination fees as before, unless instructed otherwise by the Examinations Board.

9. Appealing a decision

Applicants who are referred 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 Institute regulations or that insufficient attention was given to extenuating circumstances. Details of the appeal process can be found in Appendix 4.

10. Applicants with special needs

If you have dyslexia, disabilities or other special needs you should advise the Institute in writing at the time of registering for PME (when submitting the **PME1: Registration Form**). You may be asked to provide documentation supporting your case.

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

Any extenuating circumstances affecting the progress of the period of professional experience or the submissions 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 assessors of the interview panel at the time of that interview. Again, you may be asked subsequently to provide documentation supporting your case.

11. Timetable and fees

To start. Find a suitable Verifier and discuss your plans with him or her and, if appropriate, your colleagues. Then 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 the Institute has any concerns regarding your suggested Verifier, it will contact you about this.

Intention to submit. By 1 June of the year in which you wish to be assessed, submit a completed **PME3: Intention To Submit Form**, together with payment of the first instalment of the examination fees. The examinations fees are detailed on the **PME3: Intention To Submit Form** and website.

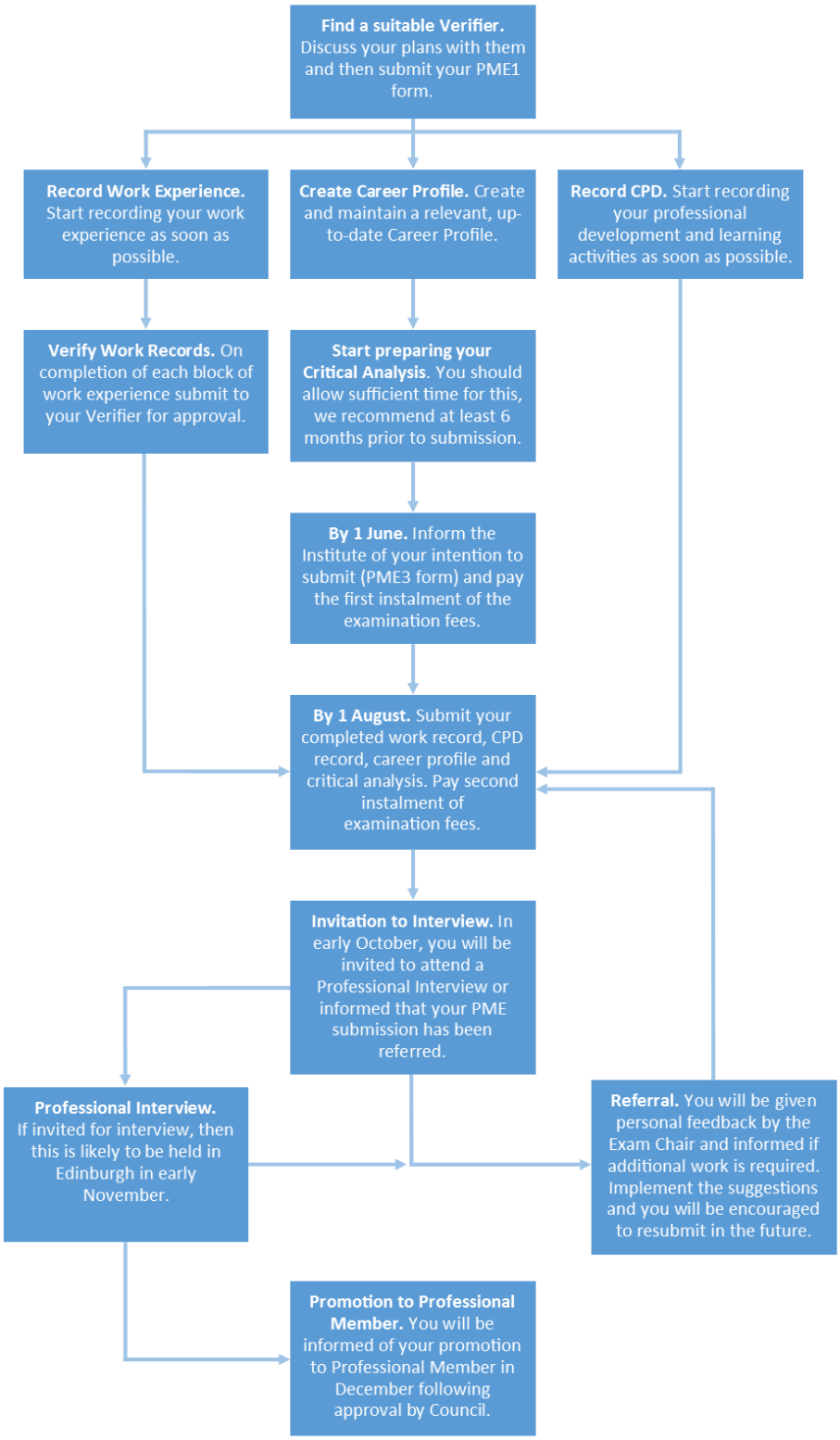
PME submission. By 1 August, submit a completed work record, CPD record and career profile. These should be submitted online in the Members Area.

Please note that once you have submitted your online records, the records are 'locked' – you will no longer be able to amend or edit these records.

Although the submission will be online, the Institute also require that you post a signed paper copy of your PME documentation and two bound copies of your critical analysis.

You must also have paid the second instalment of the examination fees by 1 August. The examinations fees are detailed on our website.

12. Summary: A outline of the PME process



APPENDIX 1: 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 2: 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.

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

Dear <Insert Name>

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 the applicant claims to have gained, both at work and in his or her own personal development. This requires the applicant to look back over a period, and provide you with sufficient evidence supporting each claim in a particular competency. Such evidence will take the form of some combination of work diaries, time-sheets, written reports and/or a record of attendance at meetings and events. In short, whatever evidence is sufficient to enable you to endorse the submitted 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 his or her 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 is recorded.

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

If, for whatever reason, you feel unable to sign off the full claim please inform the applicant and briefly explain the reason behind your decision. It is then the applicant's responsibility to explain this to the Institute of Chartered Foresters. Should you feel 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 he or she 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 please do not hesitate to contact the Institute's Member Services Director, Stuart Glen on 0131 240 1425 or stuart.glen@charteredforesters.org

Our sincere thanks for your help in this important task.

Steve McCartney FICFor
Chair of Examinations Board

APPENDIX 3: Examples of subjects for critical analyses

The following are some of the topics used by previous applicants in recent years and are offered merely to assist applicants when considering the subject matter of their proposed critical analysis. It in no way constitutes an approved list of subjects.

- A critical analysis of the 2006-2013 Rural Development Programme and development of forestry measures for the 2014-2020 Rural Development Programme.
- 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 introduction of a community-led approach to tree planting at Bristol City Council.
- A critical analysis of the management of Forestry Commission brownfield restoration projects in the Thames Chase Community Forest.
- 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 planning of restock coupe 91208.
- A critical analysis of the proposals considered and operations undertaken to plant up a 17.8 hectare restock sit in Rowney Warren Woods, Bedfordshire.
- A critical analysis of the strategies undertaken to bring a SSSI woodland into positive management.
- A critical review of developing policy for the Scottish forestry sector.
- Adapting a site-specific Tree Risk Identification and Management policy into a national policy document.
- Addressing the edge effect of Strathmore Forest on the Caithness and Sutherland peatlands SAC/SPA.
- Addressing the use of inappropriate ground preparation on a woodland creation site.
- Agreement of a 10-year woodland management plan on a country park designated a Site of Special Scientific Interest.
- Amenity land management: Critical analysis of options and results.
- Analysis of past claim patterns related to local authority procedures concerning trees and related subsidence.
- Analysis of the design plan process for a 500 hectare woodland in a National Park.
- Analysis of the issues, and the consequent research needs, involved in the conservation of remnant ancient oaks in an important heritage area.
- An analysis and examination of the applicant’s role using appropriate technology in a developing country.
- 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 approach to PAWS restoration on conifer shelterwoods at Great Wood, Somerset.
- An examination of the economic and practical options for individual tree protection on a disputed site.
- An investigation of the circumstances before and during instances of unauthorised timber removal.
- 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.
- A review of the National Forest Company's woodland management grant in 2016.
- Assessment of successes and failures associated with a farm woodland project based on a case study approach.
- Between a road and a river – Clearfelling a small, but challenging woodland in South Scotland.
- *Ceratocystis platani*: Protecting and preparing the UK.
- Coed Cathilas harvesting access: Which of three rights of way should be exercised to create a new haulage road and unlock 13,000 tonnes of timber?
- 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.
- Creation of the Council's Tree and Woodland Strategy: An analysis of the process.
- Critical analysis of a forest road Scottish Rural Development Programme grant claim.
- Critical analysis of an SRDP application for a new woodland creation on Dunach Estate.
- Critical analysis of works at Gib Torr Forest, Peak District.
- 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.
- Decision on the division of lots and the market approach to woodland sales, recognising the potential conflict of interest through loss of woodland management of the site.

- Design and sourcing requirements for a wood fuel storage depot at biomass-fuelled plant.
- Design, implementation and management of a tree risk strategy.
- 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.
- Digital data capture and meeting the needs of a client.
- Elements of the Oak Processionary Moth control programme in Pangbourne, West Berkshire.
- Environmental Impact Assessment regulations: A barrier to woodland creation in England?
- Fencing – Creating boundaries, in both the physical and professional sense.
- Gaining felling approval on a large estate.
- How can the woodland management planning process be improved upon? A consultant's perspective.
- Influencing and managing a client's expectations.
- 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.
- Issues arising in the identification and delivery of compensatory planting under the policy on the control of woodland removal.
- Land management options for heathland restoration in upland forest areas.
- Land management planning for the Flow Country: Determining appropriate responses to the call for bog restoration.
- 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 novel silvo-pastoral research project, an analysis covering fund-raising, building internal support, local community engagement and media management.
- Management of a timber harvesting and marketing programme, with particular reference to developing relationships with customers and contractors, and improving quality control.
- Managing physical damage to a Scots Pine subject of a tree preservation order on an urban development site.
- Managing Sitka Spruce regeneration for woodland creation – Carron Valley Trial.
- Modelling of the suitability for acquisition of land in Central Scotland, from a woodland creation perspective.

- Morenish Woodland creation: A study in the feasibility of implementing productive upland planting in 21st century Scotland.
- Negotiating management options for two broadleaf shooting estates in North Wales.
- Oak Processionary Moth – Integrating the complex arrangements for management of this notifiable pest with expectations of a wide range of stakeholders.
- 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.
- Researching, developing and establishing a firewood supply business.
- Respacing regeneration: A critical analysis.
- Responding to a statutory plant health notice on a challenging site.
- Restocking at scale: A critical analysis.
- Retaining trees on development sites: Balancing the often conflicting objectives.
- Review of Shropshire Council Tree Safety Policy and analysis of risk assessments.
- Safeguarding Britain's green corridors.
- Small scale harvesting in the Midlands.
- SSSI's, accepting woodland management and including sycamore in the species mix.
- Taking the Public Forest Estate in England through UKWAS audit: Pivoting on a tipping point.
- The design and build of a coupe planning database incorporating EPS licencing toolkit.
- The effectiveness of a range of management options in meeting specified objectives for a small area of state-owned recreation and amenity woodland.
- The effects of discovering a protected species on a harvesting site.
- The influx of *Chalara fraxinea* reports to Forest Research in winter 2012-2013.
- The issuance of a Statutory Plant Health Notice (SPHN) on an estate in the west of Scotland.
- The Long Wood: A case of woodland removal.
- The management of broadleaf elements of a woodland creation project.
- The management of young memorial woodland at first thin.
- The remote design and implementation of the Claggain Native Woodland Creation Scheme, to support the Ardmore, Kildalton and Callumkill Woodlands SSSI Ardtalla Estate, Isle of Islay.
- Tree felling at Doncaster Racecourse: The use of legislation to secure a mutually beneficial outcome.
- Tree growth projection modelling: A critical analysis.
- Tree Risk Assessment – An evaluation of a project risks, costs and rewards.

- Trees in relation to the implementation of an approved development.
- Vegetation surveys for utility management, the short-comings and benefits of different approaches.
- Windfarm sterilisation of forested land and timber marketing at Halfmark Forest 2016.

APPENDIX 4: The appeal procedure

4.1 Principles

4.1.1 If an applicant is denied Professional Membership and he or she 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

4.1.2 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.

4.2 The Appeal Board

4.2.1 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.

4.2.2 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

4.2.3 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.

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

4.2.5 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.

4.2.7 The decision of the Appeal Board will be final.