

# ACTIONS TABLE

ARB Board

Open Session – 10 December 2025

Red	Not Complete
Amber	Partially Complete
Green	Complete

Item	Action	Responsibility	Deadline	Meeting arisen	Update	Status
	<b>December 2023</b>					
12.	<p><b>Performance Monitoring Review Process for Q3</b></p> <p>Develop KPI's for ARB's Accreditation process and to discuss these at Board workshops in early 2024</p>	BJ	Linked to CRM deadline	28 February 2024	<p>The initial work to develop and agree the KPIs has started, based on the anticipated receipt of applications. Systems for automated collection and reporting is dependent on Phase 2 of CRM, timescale to be confirmed – likely in latter part of 2025. CRM preferred supplier identified, and timetable depends on contractual discussions and start date. Director of Performance and Planning is developing strategic KPIs for discussion. Accreditation team continue to manage</p>	<p>Partially Complete – subject to timetable for CRM phase 2/3, possibly Q4 2025</p>

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					basic categorised and time taken for each qualification application, using spreadsheets in the meantime.	
9.	<b>Board and Committee Briefing and Development Plans 2025</b>  Take forward the agreed Board and Committee briefing and development plans as set out in the paper.	EM/EJ	End of 2025	10 December 2024	The Board has undertaken various mandatory development modules via ARB's online provision; various development and briefing sessions have been woven into the Board's workshops throughout the year. A fully update on 2025 as well as briefing and development plans for 2026 will be brought to the Board in March 2026.	Partially Complete

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	<b>May 2025</b>					
13.	<p><b>Performance Monitoring Updates for Q1</b></p> <p>Provide further advice to the Board regarding the options around pro rata'd registration fees when presenting the 2026 annual retention fee proposals.</p>	HS/BJ/CG	16 October 2025	21 May 2025	<p>Our understanding of the legal position is that we have to charge a single 'prescribed' annual retention fee. We have carried out preliminary analysis which also indicates the challenges in variated fees, particularly in relation to evidence collection and administrative costs.</p> <p>We were unable to identify a mechanism by which we could waive fees in a way that would be consistent with the principle of a practising register or administratively feasible</p>	Partially Complete

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					within the timeframe. The policy approach remains complex with issues around identifying which protected characteristics, what levels of proof we require and how we can re-code the technology to allow CRM to automatically allow fee changes. Data analysis on CPD deferrals will allow us to carry out a broader regulatory impact assessment, but realistically this will feed into reviews for 2026.	
	<b>October 2025</b>					
	<b>Updates since the Board papers were issued</b>	Governance Team	10 December 2025			Complete

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6.	<p>The Chair suggested that, as part of the Governance team's review of the structure of future Board agendas, items 5 and 6 of the standing items could be combined.</p>			16 October 2025	<p>This has been picked up and incorporated into the revised approach we are taking to Board agendas from December 2025 onwards.</p>	Green
7.	<p><b>Response to consultation on three guidance documents which support the Code of Conduct</b></p> <p>The guidance should be revisited emphasising the tone of the Board's discussion to ensure that providing detailed guidance on how to handle client money.</p>	SH / RRH	February 2026	16 October 2025	<p>The revised guidance was signed off the Chair, and published.</p>	Complete

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7.	<p><b>Response to consultation on three guidance documents which support the Code of Conduct</b></p> <p>The suggestions made within the Board's discussion be incorporated into the drafting changes to the guidance documents, including a reference to whistleblower protection under the Public Interest Disclosure Act.</p>	SH / RRH	February 2025	16 October 2025	Updates were completed and the final guidance documents have been published.	Complete
7.	<p><b>Response to consultation on three guidance documents which support the Code of Conduct</b></p> <p>The Director of Professional Standards to revise the wording on page 45 to distinguish between internal reporting expectations and when external escalation was appropriate.</p>	SH	February 2025	16 October 2025	Updates were completed and the final guidance documents have been published.	Complete

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	Any significant changes would be approved by the Chair on behalf of the Board to ensure it reflected the Board's discussions and feedback.					Green
8.	<b>Routes to Registration Changes for Consultation</b>  All relevant documentation should be reviewed to ensure the consistent use of terminology.	SH / RRH	February 2025	16 October 2025	Final proofing took place after the Board approved the policy proposals for consultation. The consultation was launched on 22 October 2025.	Complete
8.	<b>Routes to Registration Changes for Consultation</b>  Governance team to review the Declaration of Interest Policy to ensure that the correct terminology was used.	Governance Team	February 2025	16 October 2025	The DOI Policy will be reviewed and updated by end of December 2025.	