

**Candidate report**

**IPMA Level A: Certified Portfolio Director**

Please complete the digital form and return by email.

**Section 1: Your details**

Your personal details

|  |  |
| --- | --- |
| **Title** |  |
| **First name** |  |
| **Surname** |  |
| **Name of organisation you work for** |  |
| **Name of training provider (if applicable)** |  |
| **Candidate number (if applicable)** |  |

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| **Have you had assistance in completing your Report? (yes/no)** |  |
| **If yes, by whom?** |  |

**Section 2: Information**

Candidates submit a report covering their project(s), programme(s) and portfolio(s) based on the project(s), programme(s) and portfolio(s) listed on the application form and Executive Summary Report. The report describes the leadership of others in complex projects throughout the life cycle. This also applies to portfolio and programme management roles and life cycles (where applicable).

The Report is completed using the template structure below.

A maximum of 25 sides in A4 format are available for the report with additional 15 sides (maximum) for appendices.

The Report shall be produced with a font size of 11. Any appendices used shall be cross-referenced to the main body of the report.

The format of the Report should be such that it is possible to be emailed and read online. The Report should also be printable.

**Section 3: Report**

The Report must relate to a recently completed project(s) relevant to the level applied for. The data can be anonymised.

It is recommended that candidates use the STAR approach (Situation, Task, Action, Result) in order to structure the report if required.

**Background**

Background providing a detailed description of the project, role in context, key stakeholders and key objectives, project organisation and the associated resources the candidate is responsible for (maximum 3 sides of A4).

**Management and leadership challenges**

Description of the management and leadership challenges with respect to others, how these were acted upon and the results achieved and a reflection on these results and lessons learnt (maximum 3 sides of A4).

**Assessment Criteria**

Please explain how you have demonstrated each of the following assessment criteria below. Please refer to the appropriate syllabus. Your evidence should not exceed 1 side of A4 for each assessment criteria.

Unit 1 Learning outcome 1 Assessment criteria 1.1 and 1.2 (strategy)

Unit 1 Learning outcome 1 (5) Assessment criteria 1.3 and 5.1 (governance structure and processes)

Unit 1 Learning outcome 1 Assessment criteria 1.4, 1.5 and 1.6 (compliance, standards and regulations)

Unit 1 Learning outcome 3(5) Assessment criteria 3.1, 3.2 and 5.2 (organisation and information)

Unit 1 Learning outcome 4 Assessment criteria 4.1 and 4.3 (resources)

Unit 1 Learning outcome 4 Assessment criteria 4.2 (finance)

Unit 2 Learning outcome 5 Assessment criteria 5.1 and 5.2 (change and transformation)

Unit 3 Learning outcome 1 Assessment criteria 1.1 (benefits)

Unit 3 Learning outcome 1 Assessment criteria 1.2 and 1.3 (stakeholders)

Unit 3 Learning outcome 1 Assessment criteria 1.4 and 1.5 (portfolio design)

Unit 3 Learning outcome 2 Assessment criteria 2.1 (scope)

Unit 3 Learning outcome 2 Assessment criteria 2.2 and 2.4 (select and balance)

Unit 3 Learning outcome 2 Assessment criteria 2.3 (time)

Unit 3 Learning outcome 3 Assessment criteria 3.1 (procurement)

Unit 3 Learning outcome 3 Assessment criteria 3.2 (quality)

Unit 3 Learning outcome 3 Assessment criteria 3.3. 3.4 and 3.5 (plan and control)

Unit 3 Learning outcome 4 Assessment criteria 4.1, 4.2 and 4.3 (risk and opportunity)

**Section 4: Appendices**

Cross-references plans, relevant company or project documents, minutes, reports etc. Please use font size 11. Maximum of 15 sides of A4 on a separate document.

**Applicant checklist** (check the box)

|  |  |
| --- | --- |
| **Completed ALL sections of your application** |  |

Completed forms to:

By email: [ipmaqualifications@apm.org.uk](mailto:ipmaqualifications@apm.org.uk)

For queries regarding IPMA qualifications, or this application form, please contact the Qualifications Department: Tel: 01844 271680 Email: [ipmaqualifications@apm.org.uk](mailto:ipmaqualifications@apm.org.uk)

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