

IPMA»

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association



# CANDIDATE GUIDANCE NOTES

IPMA Level B: Certified Senior Project, Programme or Portfolio Manager

This document provides candidates with guidance on the processes involved in obtaining the qualification.

## Level definition:

The *leadership* of others in *complex* projects, programmes or portfolios and throughout the life-cycle.

- Acting in a complex project, programme or portfolio environment.
- Responsible for a complex project, programme or portfolio within an organisation.

## Eligibility:

A minimum of five years' experience as a project, programme or portfolio manager of which at least three years were in a responsible leadership function managing complex projects, programmes or portfolios.

## Prerequisite:

All experience for level B must have been obtained within the last eight years.

The evidence timescale can be extended by four years with justification.

The qualification is a two-stage process:

**Stage one** is the application stage, which includes a complexity indicator evaluation, so candidates can determine whether they are applying for a qualification that is at the correct level. Candidates will also be asked to sign a self-assessment statement to confirm they have read all the appropriate materials and documentation and are applying to the correct level.

- Application
- CV
- Executive summary report
- Complexity indicator evaluation
- Referee declarations
- Self-assessment form

**Stage two** is the assessment itself.

- Report
- Oral examination
- An extended interview

## Qualification overview:

### Guidance for each stage:

#### STAGE ONE:

The information provided at this stage is assessed to determine whether the evidence provided by the candidate has met the eligibility criteria to progress to stage two.

#### TOP TIP!

Candidates have 18 months to complete the qualification from the date the application is accepted. Candidates must pass each assessment stage before moving onto the next one.

**If a candidate is applying directly via APM they will need to submit their report as part of the application stage of the qualification.**

## Application form and supporting information

Candidates will need to provide the following information:

- Personal contact details
- Qualifications undertaken
- Professional activity
- Reference declaration
- Applicant declaration

## CV for initial certification

A candidate's CV must include, as a minimum, the following information;

- Name and contact details
- Career history
  - Project/programme/portfolio roles and positions held
  - Degrees and coursework for accredited institutions of higher learning
  - Professional certifications and qualifications
  - Project, programme, portfolio management training
  - Professional memberships
  - Other professional development

In addition, candidates must also provide a summary of relevant projects/programmes/portfolios they have managed or been involved in.

## Executive summary report

Each candidate shall submit a report of a maximum 15 pages which shall include;

- Information on their current organisation to include company details, industry and project types, principle objectives of the organisation and the business unit in which the candidate is employed.
- A one-page summary for each of the projects/programmes/portfolios which are being used to support the application.
- The role of the candidate in their organisation to include an organisational structure chart, which identifies their position, their area of responsibility, an overview of the project management procedures they use and their relationship with all stakeholders.
- A description of how they have led each project/programme/portfolio and how they meet the complexity criteria for level B.

Projects, programmes or portfolios which are referenced in the Executive summary report should also be referenced in the CV.

## Complexity indicator evaluation

Candidates are required to evaluate the complexity of the project(s), programme(s), and portfolio(s) submitted as assessment evidence. Candidates must attain an appropriate complexity score for the level applied for. Details of the complexity indicators and the evaluation form can be found in the application pack.

## Referees

Candidates are required to provide two reference declarations along with their application pack. The referees need to be familiar with the candidates work experience.

A template for the reference declarations are included in the application pack. Two reference declarations will need to be completed along with the application form.

Candidates can list as many projects, programmes or portfolios in the Executive Summary Report as they wish but they are only required to submit two completed reference statements. This replaces the need for the referee to write a traditional reference.

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## Self-assessment

Candidates are required to complete the self-assessment form, indicating in the right hand column which of the Assessment Criteria they think they are competent in.

It is recommended that if a candidate indicates they are not competent against two or more of the Assessment Criteria per Learning Outcome it is suggested that they re-consider applying for this level at the current time. More information can be found on the self-assessment forms.

### STAGE TWO:

The following relates to the demonstration of knowledge, skills and abilities.

## Report

A candidate will submit a 25-page report (font size 11) based on projects/programmes/portfolios which have been referred to in the executive summary report. A maximum of 15 additional pages may be used in the form of supportive appendices. Please use the report template provided.

The report will focus on the application of their leadership of others, using the competence elements for the level being assessed. The level of complexity described in this report must correspond to the level applied for.

The report must contain, as a minimum, the following information;

- **Background:** a detailed description of the project, the candidate's role in context, key stakeholders and objectives, project organisation and the associated resources for which the candidate is responsible (maximum three sides of A4).
- **Description of the management and leadership challenges:** this should include how these were addressed, results achieved and a reflection on these results and lessons learned (maximum three sides of A4).
- **Competence assessment:** one side of A4 per competence element explaining how the candidate has demonstrated the assessment criteria for level B.

The report should include project(s), programme(s) or portfolio(s) where their role has been sufficiently involved to enable them to cover all the CEs that are assessed in the report and interview. Candidates can not refer to project(s), programme(s) or portfolio(s) in the interview that are not included in the report. The report will assess the specific CEs that are detailed in the relevant specification.

### TOP TIP!

Candidates are advised to use a recognised report structure such as the STAR approach (Situation, Task, Action, Result) when writing about the management challenges they have encountered.

## Oral exam

The 90 mins oral exam will ask open questions and will be focused on testing a candidate's ability to apply knowledge. The 90 mins oral exam will ask open questions and will be focused on testing candidates' ability to apply knowledge. Candidates will have 25

invigilated reading time and 65 mins to answer the 12 questions. During those 25 mins candidates will be given a copy of the question paper and will have the opportunity to make notes on the questions. The assessors will read the questions as they appear on the question paper during the remaining time, candidates may refer to their notes.

### TOP TIP!

The oral examination needs to be passed before candidates can move onto the extended interview.

## Extended interview

The 120-minute extended interview will serve two purposes. Primarily the extended interview will relate to specific competence elements and key competence indicators. However, the extended interview would be used, where necessary, to support a candidate to achieve competence elements which have not previously been met. This will help to ensure that the minimum percentage of competence elements and key competence indicators have been achieved.

## Final evaluation

During the final evaluation stage of the path the assessor will determine if the candidate has demonstrated sufficient knowledge, skills and abilities in a project/programme/portfolio context and at the relevant level of competence.

All candidates will receive results information which will indicate whether the required standard has been met or whether a candidate is not yet competent. If the candidate is deemed to be not yet competent the feedback provided will highlight areas of development that can be addressed before any potential re-take or re-assessment. If a candidate is deemed to have passed the exam stage but fail a question, feedback for that question will still be provided.

## Important information

For further information on exam regulations, pass marks and special arrangements for this qualification, please visit the FAQ's section on our website.

### TOP TIP!

Results for each stage of the qualification will be sent via email, with any applicable feedback attached.