**IPMA Level A: Certified Portfolio Director Syllabus**

Accredited Providers are requested to provide an overview of their approach to training and development of candidates in each of the evidence columns below. The form this takes will vary but could include a variety of learning and development approaches. This could include; PowerPoint slides, gap analysis questionnaires with supplementary coaching sessions or planned schedules of developing candidates to meet the assessment criteria and assessment method. This list is not exhaustive.

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| **Assessment criteria** | **ICB4**  Key competence indicators: | | **Evidence** | | **Assessor Comment** | | **Report/**  **Interview (Presentation/**  **Professional discussion)** | |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 1:**  **Align the portfolio to strategic objectives, corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | | | | | |
| 1.1 translate an organisation’s mission, vision and strategy into appropriate management control measures | 6.3.1.1, 6.3.1.4 | |  | |  | | Report | |
| 1.2 support an organisation’s strategy through the implementation, monitoring and reporting of portfolio performance measures | 6.3.1.2, 6.3.1.3, 6.3.1.5 | | Report | |
| 1.3 manage very complex portfolios through portfolio management principles considering the implementation, by others, of project and programme management principles | 6.3.2.1, 6.3.2.2 | | Report | |
| 1.4 manage complaint portfolios where relevant national and international standards and regulations are adhered to | 6.3.3.1, 6.3.3.2 | | Report | |
| 1.5 ensure very complex portfolios comply with relevant codes of conduct, professional regulation and sustainability principles | 6.3.3.3, 6.3.3.4 | | Report | |
| 1.6 combine performance benchmarks with professional development to implement a continuous improvement culture | 6.3.3.5, 6.3.3.6 | | Report | |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 3: Implement and maintain a governance framework in the context of a very complex portfolio** | | | | | | | | |
| 3.1 establish a governance framework and structure where a portfolio’s stakeholder requirements, component projects and programmes, environment and location, influence organisational design | 6.5.5.1, 6.5.5.2 | |  | |  | | Report | |
| 3.2 provide processes, systems and structures where information management and security are key considerations in very complex portfolios | 6.5.5.3 | | Report | |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 4: Set a strategy to assure a very complex portfolio is adequately resourced where organisational strategies are effectively and efficiently delivered** | | | | | | | | |
| 4.1 implement a strategic resource plan where the quality and quantity of resources, for a very complex portfolio and its component projects and programmes, are clearly identified | 6.5.8.1, 6.5.8.2 | |  | |  | | Report | |
| 4.2 establish a financial performance and reporting system which enables a budget for the portfolio to be determined | 6.5.7.1, 6.5.7.2 | | Report | |
| 4.3 establish and maintain the technical skills required for a very complex portfolio, including its component projects and programmes | 6.5.8.3 | | Report | |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 5: Manage the portfolio’s relationships with an organisation’s functions, processes and structure** | | | | | | | | |
| 5.1 ensure the portfolio is aligned to human resource functions and processes, financial control functions and processes and its reporting and decision-making structures and quality management processes | 6.3.2.3, 6.3.2.4, 6.3.2.5 | |  | |  | | Report | |
| 5.2 adjust a portfolio’s organisation structure, including component projects and programmes, in response to change drivers to ensure continual alignment with portfolio and organisational strategies | 6.5.5.4 | | Report | |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 5: Support organisational change and transformation** | | | | | | | | |
| 5.1 consider an organisation’s capacity to change when establishing change requirements and transformation opportunities | 6.5.13.1, 6.5.13.2 | |  | |  | | Report | |
| 5.2 develop, implement and adapt a change or transformation strategy within the context of a very complex portfolio | 6.5.1.5, 6.5.13.3 | | Report | |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 1: Deliver a vision and strategy for a very complex portfolio where the approach employs networks, alliances and partnerships to build important stakeholder relationships and where lessons learned are key informants of future approaches** | | | | | | | | |
| 1.1 establish the organisational goals hierarchy where stakeholder influence is a key consideration | 6.5.2.1, 6.5.12.1 | |  | |  | | Report | |
| 1.2 develop networks, alliances or partnerships with potential collaborators through the implementation of a stakeholder strategy and communication plan | 6.5.12.3, 6.5.12.4 | | Report | |
| 1.3 maintain networks, alliances or partnerships with primary stakeholders where they act as ambassadors or champions for a very complex portfolio | 6.5.12.2, 6.5.12.5 | | Report | |
| 1.4 establish success criteria for a very complex portfolio which considers component projects and programmes within a design which has the flexibility to respond to changing priorities | 6.5.1.1 | | Report | |
| 1.5 adopt a ‘lessons learned’ approach to inform future portfolio design | 6.5.1.2 | | Report | |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 2: Manage and oversee the scope of a very complex portfolio considering the selection, configuration and sequencing of component projects and programmes** | | | | | | | | |
| 2.1 based on a potential or enacted portfolio components, structure the scope of a very complex portfolio such that the scope of component projects and programmes are controlled | 6.5.3.1, 6.5.3.2, 6.5.14.4 | |  | |  | | Report | |
| 2.2 conduct programme and project oversight having prioritised programmes and projects which has been informed by organisational priorities and based on the characteristics of projects and programmes | 6.5.14.2, 6.5.14.3, 6.5.14.4 | | Report | |
| 2.3 establish the decision-making cycle for a very complex portfolio | 6.5.4.1 | | Report | |
| 2.4 predict the future performance of a portfolio and recommend a future component mix for executive approval/rejection | 6.5.14.5, 6.5.14.6 | | Report | |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 3: Make appropriate and timely recommendations through regularly reporting on the status of a very complex portfolio** | | | | | | | | |
| 3.1 manage and govern a procurement system | 6.5.9.1 | |  | |  | | Report | |
| 3.2 implement a quality approach for a very complex portfolio and its component projects and programmes | 6.5.6.1 | | Report | |
| 3.3 establish a portfolio system | 6.5.10.1 | | Report | |
| 3.4 establish and maintain the portfolio cycle | 6.5.10.2 | | Report | |
| 3.5 regularly report on the status of the portfolio | 6.5.10.3 | | Report | |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 4: Effectively manage risk and opportunity within a very complex portfolio** | | | | | | | | |
| 4.1 identify risks and opportunities within a risk management framework | 6.5.11.1, 6.5.11.2 | |  | |  | | Report | |
| 4.2 determine the impact of risks and opportunities through qualitative and quantitative assessments | 6.5.11.3 | | Report | |
| 4.3 determine, monitor and evaluate appropriate strategies and response plans to address risks and opportunities for a very complex portfolio | 6.5.11.4, 6.5.11.5 | | Report | |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 2: Deliver portfolio management strategies through others where individual and team power and influence are integrated into an organisation’s culture** | | | | | | | | |
| 2.1 consider the impact of individual personalities, working styles, ambitions and interests when establishing individual and team goals | | 6.3.4.1, 6.3.4.3 | |  | |  | | Interview (Presentation) |
| 2.2 determine the impact of formal and informal relationships and influences on very complex portfolios | | 6.3.4.2 | | Interview (Presentation) |
| 2.3 consider the impact of societal culture and the informal culture and values of an organisation when developing portfolio plans and performance measures | | 6.3.5.1, 6.3.5.3 | | Interview (Presentation) |
| 2.4 align portfolio aims, objectives and plans with the organisation’s formal culture and values | | 6.3.5.2 | | Interview (Presentation) |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a very complex portfolio** | | | | | | | | |
| 3.1 apply appropriate power and leadership styles alongside coaching and mentoring techniques to influence the behaviour of others to achieve established and evolving goals | | 6.4.5.3, 6.4.5.4 | |  | |  | | Interview (Presentation) |
| 3.2 positively inform the behaviours and actions of others through a proactive approach to supporting individuals and teams and through taking ownership of a very complex portfolio’s objectives | | 6.4.5.1, 6.4.5.2 | | Interview (Presentation) |
| 3.3 communicate a course of action based on informed decisions in situations where uncertainty influences actions | | 6.4.5.5 | | Interview (Presentation) |
| 3.4 establish an effective and efficient team where co-operation, internal networking and shared objectives lead to better performance based on a culture of empowerment within a very complex portfolio | | 6.4.6.1, 6.4.6.2, 6.4.6.4 | | Interview (Presentation) |
| 3.5 reflect on areas for improvement in performance to promote a culture of continuous improvement in individuals and teams | | 6.4.6.3, 6.4.6.5 | | Interview (Presentation) |
| 3.6 inform the strategies of a very complex portfolio through an open working relationship between and within teams where information sharing is used to promote conceptual thinking and a holistic view of the portfolio | | 6.4.8.1, 6.4.8.2, 6.4.8.5 | | Interview (Presentation) |
| 3.7 apply appropriate and analytical techniques to different, but very complex, situations which require creative and alternative solutions | | 6.4.8.3, 6.4.8.4 | | Interview (Presentation) |
| 3.8 anticipate individual and team needs to support effective operations in a healthy, save and productive, but very complex, working environment | | 6.4.10.2, 6.4.10.3 | | Interview (Presentation) |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 4: Support portfolio success through effective negotiation and conflict resolution** | | | | | | | | |
| 4.5 manage a very complex portfolio effectively and efficiently, engaging with stakeholders to gain acceptance of portfolio goals, processes and outcomes | | 6.4.10.4, 6.4.10.5 | |  | |  | | Interview (Presentation) |
| 4.6 measure the impact of decisions and actions on the success of a very complex portfolio and the achievement of organisational objectives | | 6.4.10.1 | | Interview (Presentation) |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be an effective portfolio manager** | | | | | | | | |
| 1.1 use individual experiences and self-awareness to inform future performance, recognise area for improvement and build on existing strengths | | 6.4.1.1, 6.4.1.2 | |  | |  | | Interview (Professional discussion) |
| 1.2 support appropriate workplace behaviours through effective self-direction, goal setting, time management and organisational skills based on a continual desire to learn and develop within the context of a very complex portfolio | | 6.4.1.3, 6.4.1.4, 6.4.1.5 | | Interview (Professional discussion) |
| 1.3 act ethically towards, and with responsibility for, own actions and decision making | | 6.4.2.1, 6.4.2.3 | | Interview (Professional discussion) |
| 1.4 deliver sustainable, complete and accurate outcomes through a consistent approach to decision making based on the context of a very complex portfolio | | 6.4.2.2, 6.4.2.4, 6.4.2.5 | | Interview (Professional discussion) |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 2: Inspire others through meaningful and engaging relationships, employing open and inclusive communication** | | | | | | | | |
| 2.1 apply appropriate techniques which support and facilitate a structured and open approach to inclusive communication within a very complex portfolio | | 6.4.3.1, 6.4.3.2, 6.4.3.5 | |  | |  | | Interview (Professional discussion) |
| 2.2 determine appropriate communication methods considering the situation and audience, including virtual teams | | 6.4.3.3, 6.4.3.4 | | Interview (Professional discussion) |
| 2.3 develop a network of internal and external contacts to establish relationships which will support the achievement of a very complex portfolio’s vision and goals | | 6.4.4.1, 6.4.4.2, 6.4.4.5 | | Interview (Professional discussion) |
| 2.4 use appropriate techniques to understand the concerns of others thereby developing respectful and meaningful professional relationships | | 6.4.4.3, 6.4.4.4 | | Interview (Professional discussion) |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 4: Support portfolio success through effective negotiation and conflict resolution** | | | | | | | | |
| 4.1 recognise and interpret existing and potential areas of conflict, being mindful of the possible impact on people, to inform appropriate responses and resolutions | | 6.4.7.1, 6.4.7.2, 6.4.7.3 | |  | |  | | Interview (Professional discussion) |
| 4.2 reflect on the impact, potential or real, of conflicts and crises to stimulate learning and strengthen team cohesion | | 6.4.7.4 | | Interview (Professional discussion) |
| 4.3 apply appropriate negotiation techniques to establish interests, needs and constraints which support the creation of a negotiation strategy to achieve objectives | | 6.4.9.1, 6.4.9.2, 6.4.9.3 | | Interview (Professional discussion) |
| 4.4 achieve satisfactory agreements with others where exploiting new opportunities is a key negotiating factor | | 6.4.9.4, 6.4.9.5 | | Interview (Professional discussion) |

**IPMA Level A: Certified Programme Director Syllabus**

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| **Assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** | **Report/**  **Interview (Presentation/**  **Professional discussion)** | |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome: Align the programme to strategic objectives, corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.1 translate an organisation’s mission, vision and strategy into appropriate management control measures | 5.3.1.1, 5.3.1.4 |  |  | Report |
| 1.2 support an organisation’s strategy through the implementation, monitoring and reporting of programme performance measures | 5.3.1.2, 5.3.1.3, 5.3.1.5 | Report |
| 1.3 manage very complex programmes through programme management principles and within existing governance, structures and processes where a programme’s and an organisation’s decision making, reporting and quality are in alignment | 5.3.2.1, 5.3.2.5 | Report |
| 1.4 manage compliant programmes and their components where relevant national and international standards and regulations are adhered to | 5.3.3.1, 5.3.3.2 | Report |
| 1.5 ensure very complex programmes and their components comply with relevant codes of conduct, professional regulation and sustainability principles | 5.3.3.3, 5.3.3.4 | Report |
| 1.6 combine performance benchmarks with professional development to implement a continuous improvement culture | 5.3.3.5, 5.3.3.6 | Report |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 3: Implement and maintain a governance framework in the context of a very complex programme** | | | | |
| 3.1 establish a programme governance framework and structure where a programme’s stakeholders, context, environment and location influence organisational design | 5.5.5.1, 5.5.5.2 |  |  | Report |
| 3.2 provide processes, systems and structures where information management and security are key considerations in very complex programmes | 5.5.5.3 | Report |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 4: Set a strategy to assure a very complex programme is adequately resourced where organisational strategies are effectively and efficiently delivered** | | | | |
| 4.1 implement a strategic resource plan where financial forecasting, planning and supporting functions are key considerations when determining the quality and quantity of required resources for a very complex programme | 5.3.2.4, 5.3.2.6, 5.5.8.1, 5.5.8.2 |  |  | Report |
| 4.2 implement a financial management framework which embraces funding mechanisms and budgets | 5.5.7.1, 5.5.7.2, 5.5.7.3 | Report |
| 4.3 use a financial management, control and reporting system to distribute programme funds | 5.3.2.7, 5.5.7.4, 5.5.7.5 | Report |
| 4.4 effectively negotiate programme resources with appropriate stakeholders | 5.5.8.3 | Report |
| 4.5 follow a systematic approach to resource availability and distribution which facilitates corrective action to be taken when required | 5.5.8.4, 5.5.8.5 | Report |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 5: Manage the programme – portfolio relationship responding to change drivers as required** | | | | |
| 5.1 determine the relationship between a programme and a portfolio of programmes where a relationship exists in a very complex context | 5.3.2.2, 5.3.2.3 |  |  | Report |
| 5.2 adjust a programme’s organisational structure in response to change drivers to ensure continual alignment with programme and organisational strategies | 5.5.5.4 | Report |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 5: Support organisational change and transformation** | | | | |
| 5.1 consider an organisation’s capacity to change when establishing change requirements and transformation opportunities | 5.5.13.1, 5.5.13.2 |  |  | Report |
| 5.2 develop, implement and adapt a change or transformation strategy within the context of a very complex programme | 5.5.1.5, 5.5.13.3, 5.5.13.4 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 1: Deliver a vision and strategy for a very complex programme where the approach employs networks, alliances and partnerships to build important stakeholder relationships and where lessons learned are key informants of future approaches** | | | | |
| 1.1 establish a benefits realisation strategy for the programme based on a stakeholder analysis, which embeds the programme’s goals and benefits hierarchy using recognised tools and techniques | 5.5.2.1, 5.5.2.2, 5.5.2.3, 5.5.12.1 |  |  | Report |
| 1.2 maintain networks, alliances or partnerships with primary stakeholders where they act as ambassadors or champions for a very complex programme | 5.5.12.2, 5.5.12.5 | Report |
| 1.3 develop networks, alliances or partnerships with potential collaborators through the implementation of a stakeholder strategy and communication plan | 5.5.12.3, 5.5.12.4 | Report |
| 1.4 establish programme and component success criteria within a design which has the flexibility to respond to changing priorities | 5.5.1.1 | Report |
| 1.5 adopt a ‘lessons learned’ approach to inform future programme and component design | 5.5.1.2 | Report |
| 1.6 create a vision for the programme which informs a flexible programme management approach where complexity and consequences for the approach are key considerations | 5.5.1.3, 5.5.1.4, 5.5.1.6 | Report |
| 1.7 design an execution architecture and delivery strategy for a very complex programme | 5.5.1.7, 5.5.1.8 | Report |
| 1.8 monitor the benefits achieved from components having first defined them their intended outcomes and their interfaces | 5.5.2.4, 5.5.2.4 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 2: Manage the scope of a very complex programme considering the configuration and sequencing of components** | | | | |
| 2.1 structure the scope of a very complex programme based on the proposed scope of its components, documenting decisions taken when selecting the components | 5.5.3.1, 5.5.3.2, 5.5.14.4 |  |  | Report |
| 2.2 maintain scope configuration through the effective management of the scope of components | 5.5.3.3, 5.5.3.4 | Report |
| 2.3 prioritise components based on their characteristics and programme priorities | 5.5.14.1, 5.5.14.2 | Report |
| 2.4 effectively sequence programme components into tranches | 5.5.4.1 | Report |
| 2.5 manage the consistency of tranches to ensure effective and smooth transition from one tranche to another | 5.5.4.2, 5.5.4.3 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 3: Evaluate a programme’s components giving consideration to quality assurance, component performance and component interfaces** | | | | |
| 3.1 implement quality assurance measures based on a quality approach for a very complex programme and its components | 5.5.6.1, 5.5.6.2 |  |  | Report |
| 3.2 establish a programme ensuring the interfaces and collaborations between programme components are effectively managed | 5.5.10.1, 5.5.10.2 | Report |
| 3.3 regularly evaluate the status of programme components and their performance adjusting the behaviour of components, when deviations from plan occur, to ensure components and delivering as intended | 5.5.10.3, 5.5.14.3 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 4: Effectively manage risk and opportunity within a very complex programme** | | | | |
| 4.1 identify risks and opportunities within a risk management framework | 5.5.11.1, 5.5.11.2 |  |  | Report |
| 4.2 determine the impact of risks and opportunities through qualitative and quantitative assessments | 5.5.11.3 | Report |
| 4.3 determine, monitor and evaluate appropriate strategies and response plans to address risk and opportunities for a very complex programme | 5.5.11.4, 5.5.11.5 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 5: Establish, manage and finalise a programme within a very complex context** | | | | |
| 5.1 manage and govern a procurement system for a programme | 5.5.9.1 |  |  | Report |
| 5.2 develop and manage partnerships through the programme life cycle | 5.5.9.2, 5.5.9.3 | Report |
| 5.3 provide direction to component managers | 5.5.10.4 | Report |
| 5.4 finalise a very complex programme and its components when appropriate | 5.5.10.5 | Report |
| **Unit 1- The impact of organisations on programme management**  **Learning Outcome 2: Deliver programme management strategies through others where individual and team power and influence are integrated into an organisation’s culture** | | | | | |
| 2.1 consider the impact of individual personalities, working styles, ambitions and interests when establishing individual and team goals | 5.3.4.1, 5.3.4.3 |  |  | Interview (Presentation) | |
| 2.2 determine the impact of formal and informal relationships and influences on very complex programmes | 5.3.4.2 | Interview (Presentation) | |
| 2.3 consider the impact of societal culture and the informal culture and values of an organisation when developing programme plans and performance measures | 5.3.5.1, 5.3.5.3 | Interview (Presentation) | |
| 2.4 align programme aims, objectives and plans with the organisation’s formal culture and values | 5.3.5.2 | Interview (Presentation) | |
| **Unit 2- Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a very complex programme** | | | | | |
| 3.1 apply appropriate power and leadership styles alongside coaching and mentoring techniques to influence the behaviour of others to achieve established and evolving goals | 5.4.5.3, 5.4.5.4 |  |  | Interview (Presentation) | |
| 3.2 positively inform the behaviours and actions of others through a proactive approach to supporting individuals and teams and through taking ownership of a very complex programme’s objectives | 5.4.5.1, 5.4.5.2 | Interview (Presentation) | |
| 3.3 communicate a course of actions based on informed decisions in situations where uncertainty influences actions | 5.4.5.5 | Interview (Presentation) | |
| 3.4 establish an effective and efficient team where co-operation, internal networking and shared objectives lead to better performance based on a culture of empowerment within a very complex programme | 5.4.6.1, 5.4.6.2, 5.4.6.4 | Interview (Presentation) | |
| 3.5 reflect on areas for improvement in performance to promote a culture of continuous improvement in individuals and teams | 5.4.6.3, 5.4.6.5 | Interview (Presentation) | |
| 3.6 inform the strategies of a very complex programme through an open working relationship between and within teams where information sharing is used to promote conceptual thinking and a holistic view of the programme | 5.4.8.1, 5.4.8.2, 5.4.8.5 | Interview (Presentation) | |
| 3.7 apply appropriate analytical techniques to different but very complex situations which require creative and alternative solutions | 5.4.8.3, 5.4.8.4 | Interview (Presentation) | |
| 3.8 anticipate individual and team needs to support effective operations in a healthy, safe and productive but very complex, working environment | 5.4.10.2, 5.4.10.3 | Interview (Presentation) | |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 4: Support programme success through effective negotiation and conflict resolution** | | | | | |
| 4.5 manage a very complex programme effectively and efficiently, engaging with stakeholders to gain acceptance of programme goals, processes and outcomes | 5.4.10.4, 5.4.10.5 |  |  | Interview (Presentation) | |
| 4.6 measure the impact of decisions and actions on the success of a very complex programme and the achievement of organisational objectives | 5.4.10.1 | Interview (Presentation) | |
| **Unit 2- Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be an effective programme manager** | | | | | |
| 1.1 use individual experiences and self-awareness to inform future performance, recognise areas for improvement and build on existing strengths | 5.4.1.1, 5.4.1.2 |  |  | Interview (Professional discussion) | |
| 1.2 support appropriate workplace behaviours through effective self-direction, goal setting, time management and organisational skills based on a continual desire to learn and develop within the context of a very complex programme | 5.4.1.3, 5.4.1.4, 5.4.1.5 | Interview (Professional discussion) | |
| 1.3 act ethically towards, and with responsibility for, own actions and decision making | 5.4.2.1, 5.4.2.3 | Interview (Professional discussion) | |
| 1.4 deliver sustainable, complete and accurate outcomes through a consistent approach to decision making based on the context of a very complex programme | 5.4.2.2, 5.4.2.4, 5.4.2.5 | Interview (Professional discussion) | |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 2: Inspire others through meaningful and engaging relationships employing open and inclusive communication** | | | | | |
| 2.1 apply appropriate techniques which support and facilitate a structured and open approach to inclusive communication within a very complex programme | 5.4.3.1, 5.4.3.2, 5.4.3.5 |  |  | Interview (Professional discussion) | |
| 2.2 determine appropriate communication methods considering the situation and audience, including virtual teams | 5.4.3.3, 5.4.3.4 | Interview (Professional discussion) | |
| 2.3 develop a network of internal and external contacts to establish relationships which will support the achievement of a very complex | 5.4.4.1, 5.4.4.2, 5.4.4.5 | Interview (Professional discussion) | |
| 2.4 use appropriate techniques to understand the concerns of others thereby developing respectful and meaningful professional relationships | 5.4.4.3, 5.4.4.4 | Interview (Professional discussion) | |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 4: Support programme success through effective negotiation and conflict resolution** | | | | | |
| 4.1 recognise and interpret existing and potential areas of conflict, being mindful of the possible impact on people, to inform appropriate responses and resolutions | 5.4.7.1, 5.4.7.2, 5.4.7.3 |  |  | Interview (Professional discussion) | |
| 4.2 reflect on the impact, potential or real, of conflict and crises to stimulate learning and strengthen team cohesion | 5.4.7.4 | Interview (Professional discussion) | |
| 4.3 apply appropriate negotiation techniques to establish interests, needs and constraints which support the creation of a negotiation strategy to achieve objectives | 5.4.9.1, 5.4.9.2, 5.4.9.3 | Interview (Professional discussion) | |
| 4.4 achieve satisfactory agreements with others where exploiting new opportunities is a key negotiating factor | 5.4.9.4, 5.4.9.5 | Interview (Professional discussion) | |

**IPMA Level A: Certified Project Director Syllabus**

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| **Assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** | **Report/**  **Interview (Presentation/**  **Professional discussion)** |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 1: Align project strategies and organisational objectives to corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.1 align an organisation’s mission, vision and strategy into appropriate management control measures | 4.3.1.1, 4.3.1.4 |  |  | Report |
| 1.2 inform an organisation’s strategy through the monitoring and reporting of project performance measures | 4.3.1.2, 4.3.1.3, 4.3.1.5 | Report |
| 1.3 manage very complex projects through project management principles and within existing governance, structures and processes where a project’s and an organisation’s decision making, reporting and quality are in alignment | 4.3.2.1, 4.3.2.5 | Report |
| 1.4 manage compliant projects where relevant national and international standards and regulations are adhered to | 4.3.3.1, 4.3.3.2 | Report |
| 1.5 ensure very complex projects and project teams comply with relevant codes of conduct, professional regulation and sustainability principles | 4.3.3.3, 4.3.3.4 | Report |
| 1.6 combined performance benchmarks with professional development to support a continuous improvement culture | 4.3.3.5, 4.3.3.6 | Report |
| 1.7 determine the relationship between a project, a programme and/or a portfolio of projects where the relationship exists in a very complex context | 4.3.2.2, 4.3.2.3 | Report |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 3: Develop a project structure which facilitates an effective information exchange between stakeholders of a very complex project** | | | | |
| 3.1 establish a project structure where a project’s stakeholders, context, environment and location will influence organisational design | 4.5.5.1, 4.5.5.2 |  |  | Report |
| 3.2 establish communication processes which embraces communication models, methods and control mechanisms within a very complex project | 4.5.5.3 | Report |
| 3.3 adjust a project’s organisational structure in response to change drivers to ensure continual alignment with project and organisational strategies | 4.5.5.4 | Report |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 4: Set a strategy to assure a very complex project is adequately resourced where organisational strategies are effectively and efficiently delivered** | | | | |
| 4.1 implement a resource plan where financial forecasting, planning and supporting functions are key considerations when determining the quality and quantity of required resources for a very complex project | 4.3.2.4, 4.3.2.6, 4.5.8.1, 4.5.8.2 |  |  | Report |
| 4.2 apply financial accounting techniques to determine project costs, funding and budgets | 4.5.7.1, 4.5.7.2, 4.5.7.3 | Report |
| 4.3 use a financial management, control and reporting system to identify and correct deviations | 4.3.2.7, 4.5.7.4, 4.5.7.5 | Report |
| 4.4 effectively negotiate project resources with appropriate stakeholders | 4.5.8.3 | Report |
| 4.5 follow a systematic approach to resource allocation which facilitates corrective action to be taken when required | 4.5.8.4, 4.5.8.5 | Report |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 5: Support organisational change and transformation** | | | | |
| 5.1 consider an organisation’s capacity to change when establishing change requirements and transformation opportunities | 4.5.13.1, 4.5.13.2 |  |  | Report |
| 5.2 develop and implement a change or transformation strategy within the context of a very complex project | 4.5.13.3, 4.5.13.4 | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 1: Utilise effective stakeholder engagement to deliver successful projects** | | | | |
| 1.1 prioritise project goals where requirements and acceptance criteria are based on a stakeholder analysis | 4.5.2.1, 4.5.2.2, 4.5.2.3, 4.5.12.1 |  |  | Report |
| 1.2 develop networks and alliances through the implementation of a stakeholder strategy and communication plan for a very complex project | 4.5.12.2, 4.5.12.5 | Report |
| 1.3 engage effectively with key internal and external stakeholders to inform project progress | 4.5.12.3, 4.5.12.4 | Report |
| 1.4 establish project success criteria within a design which has the flexibility to respond to changing priorities | 4.5.1.1 | Report |
| 1.5 adopt a ‘lessons learned’ approach to inform future projects | 4.5.1.2 | Report |
| 1.6 select a project management approach which considers the complexity of a project and the impact of internal and external influences on that approach | 4.5.1.3, 4.5.1.4 | Report |
| 1.7 establish a project execution architecture based on an agreed approach to managing a very complex project | 4.5.1.5 | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**    **Learning Outcome 2: Maintain the scope of a very complex project ensuring time is scheduled efficiently to optimise project execution** | | | | |
| 2.1 structure the scope of a very complex project based on definable project deliverables | 4.5.3.1, 4.5.3.2 |  |  | Report |
| 2.2 define project work packages which can be maintained within scope | 4.5.3.3, 4.5.3.4 | Report |
| 2.3 apply project management techniques to establish activities, work effort and activity duration to deliver a very complex project | 4.5.4.1, 4.5.4.2 | Report |
| 2.4 apply appropriate planning techniques to sequence and schedule activities based on the selected project management approach | 4.5.4.3, 4.5.4.4 | Report |
| 2.5 apply schedule control systems to determine variances and inform scheduling adjustments within a very complex project | 4.5.4.5 | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**    **Learning Outcome 3: Plan and monitor the execution of a very complex project to help ensure quality of process, product and output** | | | | |
| 3.1 prepare appropriate documentation to procure goods and services based on negotiated and agreed contractual terms and conditions | 4.5.9.3, 4.5.9.2 (part) |  |  | Report |
| 3.2 develop and implement an effective and efficient quality management plan which has the flexibility to respond to the outcomes of audits and any review of the quality of project deliverables throughout a project | 4.5.6.1, 4.5.6.2, 4.5.6.5 | Report |
| 3.3 start and execute a very complex project based on an agreed project management plan which supports the transition to subsequent phases of a project | 4.5.10.1, 4.5.10.2 | Report |
| 3.4 implement a performance control cycle which informs appropriate reporting mechanisms | 4.5.10.3, 4.5.10.4 | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 4: Manage risk and opportunity within a very complex project** | | | | |
| 4.1 identify risks and opportunities within a risk management framework | 4.5.11.1, 4.5.11.2 |  |  | Report |
| 4.2 determine the impact of risks and opportunities through qualitative and quantitative assessments | 4.5.11.3 | Report |
| 4.3 determine, monitor and evaluate appropriate strategies and response plans to address risks and opportunities for a very complex project | 4.5.11.4, 4.5.11.5 | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 5: Manage contracts through stakeholder engagement, responding to changes prior to closing a project or phase** | | | | |
| 5.1 work with stakeholders to determine procurement requirements, project suppliers and partners | 4.5.9.1, 4.5.9.2 (part) |  |  | Report |
| 5.2 effectively manage contract performance taking appropriate and timely action when required | 4.5.9.4 | Report |
| 5.3 work with key stakeholders to establish plans to verify project quality requirements, objectives and standards, and to validate project outcomes for a very complex project | 4.5.6.3, 4.5.6.4 | Report |
| 5.4 implement agreed project changes following an appropriate assessment | 4.5.10.5 | Report |
| 5.5 close and evaluate a phase or a project | 4.5.10.6 | Report |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 2: Deliver projects through others where collaborative relationships, individual and team power and influence are integrated into an organisation’s culture** | | | | |
| 2.1 consider individual personalities, working styles, ambitions and interests when establishing individual and team goals | 4.3.4.1, 4.3.4.3 |  |  | Interview (Presentation) |
| 2.2 determine the formal and informal impact of individuals and groups on a very complex project | 4.3.4.2 | Interview (Presentation) |
| 2.3 consider the impact of societal culture and the informal culture and values of an organisation when developing project plans and performance measures | 4.3.5.1, 4.3.5.3 | Interview (Presentation) |
| 2.4 align project aims, objectives and plans with the organisation’s formal culture and values | 4.3.5.2 | Interview (Presentation) |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a very complex project** | | | | |
| 3.1 apply appropriate power and leadership styles alongside coaching and mentoring techniques to influence the behaviour of others to achieve established and evolving goals | 4.4.5.3, 4.4.5.4 |  |  | Interview (Presentation) |
| 3.2 positively inform the behaviours and actions of others through a proactive approach to supporting individuals and teams and through taking ownership of a very complex project’s objectives | 4.4.5.1, 4.4.5.2 | Interview (Presentation) |
| 3.3 communicate a course of action based on informed decisions in situations where uncertainty influences actions | 4.4.5.5 | Interview (Presentation) |
| 3.4 establish an effective and efficient team where co-operation, internal networking and shared objectives lead to better performance based on a culture of empowerment within a very complex project | 4.4.6.1, 4.4.6.2, 4.4.6.4 | Interview (Presentation) |
| 3.5 reflect on areas for improvement in performance to promote a culture of continuous improvement in individuals and teams | 4.4.6.3, 4.4.6.5 | Interview (Presentation) |
| 3.6 inform the strategies of a very complex project through an open working relationship between and within teams where information sharing is used to promote conceptual thinking | 4.4.8.1, 4.4.8.2 | Interview (Presentation) |
| 3.7 apply appropriate analytical techniques to different but very complex situations which require creative and alternative solutions | 4.4.8.3, 4.4.8.4 | Interview (Presentation) |
| 3.8 anticipate individual and team needs to support effective operations in a healthy, safe and productive, but very complex, working environment | 4.4.10.2, 4.4.10.3 | Interview (Presentation) |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 4: Deliver project outcomes through effective negotiation and conflict resolution** | | | | |
| 4.5 manage a very complex project effectively and efficiently, engaging with stakeholders to gain acceptance of project goals, processes and outcomes | 4.4.10.4, 4.4.10.5 |  |  | Interview (Presentation) |
| 4.6 measure the impact of decisions and actions on the success of a very complex project and the achievement of organisational objectives | 4.4.10.1 | Interview (Presentation) |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be a trusted and reliable project manager** | | | | |
| 1.1 use individual experiences and self-awareness to inform future performance, recognise areas for improvement and build on existing strengths | 4.4.1.1, 4.4.1.2 |  |  | Interview (Professional discussion) |
| 1.2 support appropriate workplace behaviours through effective self-direction, goal setting, time management and organisational skills based on a continual desire to learn and develop within the context of a very complex project | 4.4.1.3, 4.4.1.4, 4.4.1.5 | Interview (Professional discussion) |
| 1.3 act ethically towards, and with responsibility for, own actions and decision making | 4.4.2.1, 4.4.2.3 | Interview (Professional discussion) |
| 1.4 deliver sustainable, complete and accurate outcomes through a consistent approach to decision making based on a holistic view of a very complex project and its context | 4.4.2.2, 4.4.2.4, 4.4.2.5, 4.4.8.5 | Interview (Professional discussion) |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 2: Develop productive and engaging relationships where open and transparent communication plays a significant role within a very complex project** | | | | |
| 2.1 apply appropriate techniques which support and facilitate a structured and open approach to inclusive communication within a very complex project | 4.4.3.1, 4.4.3.2, 4.4.3.5 |  |  | Interview (Professional discussion) |
| 2.2 determine appropriate communication methods considering the situation and audience, including virtual teams | 4.4.3.3, 4.4.3.4 | Interview (Professional discussion) |
| 2.3 develop a network of internal and external contacts to establish relationships which will support he achievement of a very complex project’s vision and goals | 4.4.4.1, 4.4.4.2, 4.4.4.5 | Interview (Professional discussion) |
| 2.4 use appropriate techniques to understand the concerns of others thereby developing respectful and meaningful professional relationships | 4.4.4.3, 4.4.4.4 | Interview (Professional discussion) |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 4: Deliver project outcomes through effective negotiation and conflict resolution** | | | | |
| 4.1 recognise and interpret existing and potential areas of conflict, being mindful of the possible impact on people, to inform appropriate responses and resolutions | 4.4.7.1, 4.4.7.2, 4.4.7.3 |  |  | Interview (Professional discussion) |
| 4.2 reflect on the impact, potential or real, of conflicts and crises to stimulate learning and strengthen team cohesion | 4.4.7.4 | Interview (Professional discussion) |
| 4.3 apply appropriate negotiation techniques to establish interests, needs and constraints which support the creation of a negotiation strategy to achieve objectives | 4.4.9.1, 4.4.9.2, 4.4.9.3 | Interview (Professional discussion) |
| 4.4 achieve satisfactory agreements with others where exploiting new opportunities is a key negotiating factor | 4.4.9.4, 4.4.9.5 | Interview (Professional discussion) |

**IPMA Level B: Certified Senior Portfolio Manager Syllabus**

Accredited Providers are requested to provide an overview of their approach to training and development of candidates in each of the evidence columns below. The form this takes will vary but could include a variety of learning and development approaches. This could include; PowerPoint slides, gap analysis questionnaires with supplementary coaching sessions or planned schedules of developing candidates to meet the assessment criteria and assessment method. This list is not exhaustive.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** | **Report/Oral examination/**  **Interview** |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 1: Align the portfolio to strategic objectives, corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.1 translate an organisation’s mission, vision and strategy into appropriate management control measures | 6.3.1.1, 6.3.1.4 |  |  | Report |
| 1.2 support an organisation’s strategy through the implementation, monitoring and reporting of portfolio performance measures | 6.3.1.2, 6.3.1.3, 6.3.1.5 | Report |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 4: Set a strategy to assure a complex portfolio is adequately resourced where organisational strategies are effectively and efficiently delivered** | | | | |
| 4.1 implement a strategic resource plan where the quality and quantity of resources, for a complex portfolio and its component projects and programmes, are clearly identified | 6.5.8.1, 6.5.8.2 |  |  | Report |
| 4.2 establish a financial performance and reporting system which enables a budget for the portfolio to be determined | 6.5.7.1, 6.5.7.2 | Report |
| 4.3 establish and maintain the technical skills required for a complex portfolio, including its component projects and programmes | 6.5.8.3 | Report |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 2: Inspire others through meaningful and engaging relationships, employing open and inclusive communication** | | | | |
| 2.1 apply appropriate techniques which support and facilitate a structured and open approach to inclusive communication within a complex portfolio | 6.4.3.1, 6.4.3.2, 6.4.3.5 |  |  | Report |
| 2.2 determine appropriate communication methods considering the situation and audience, including virtual teams | 6.4.3.3, 6.4.3.4 | Report |
| 2.3 develop a network of internal and external contacts to establish relationships which will support the achievement of a complex portfolio’s vision and goals | 6.4.4.1, 6.4.4.2, 6.4.4.5 | Report |
| 2.4 use appropriate techniques to understand the concerns of others thereby developing respectful and meaningful professional relationships | 6.4.4.3, 6.4.4.4 | Report |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex portfolio** | | | | |
| 3.4 establish an effective and efficient team where co-operation, internal networking and shared objectives lead to better performance based on a culture of empowerment within a complex portfolio | 6.4.6.1, 6.4.6.2, 6.4.6.4 |  |  | Report |
| 3.5 reflect on areas for improvement in performance to promote a culture of continuous improvement in individuals and teams | 6.4.6.3, 6.4.6.5 | Report |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 4: Support portfolio success through effective negotiation and conflict resolution** | | | | |
| 4.3 apply appropriate negotiation techniques to establish interests, needs and constraints which support the creation of a negotiation strategy to achieve objectives |  |  |  | Report |
| 4.4 achieve satisfactory agreements with others where exploiting new opportunities is a key negotiating factor |  | Report |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 5: Support organisational change and transformation** | | | | |
| 5.1 consider an organisation’s capacity to change when establishing change requirements and transformation opportunities | 6.5.13.1, 6.5.13.2 |  |  | Report |
| 5.2 develop, implement and adapt a change or transformation strategy within the context of a complex portfolio | 6.5.1.5, 6.5.13.3 | Report |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 1: Deliver a vision and strategy for a very complex portfolio where the approach employs networks, alliances and partnerships to build important stakeholder relationships and where lessons learned are key informants of future approaches** | | | | |
| 1.1 establish the organisational goals hierarchy where stakeholder influence is a key consideration | 6.5.2.1, 6.5.12.1 |  |  | Report |
| 1.2 maintain networks, alliances or partnerships with primary stakeholders where they act as ambassadors or champions for a complex portfolio | 6.5.12.2, 6.5.12.5 | Report |
| 1.3 develop networks, alliances or partnerships with potential collaborators through the implementation of a stakeholder strategy and communication plan | 6.5.12.3, 6.5.12.4 | Report |
| 1.4 establish success criteria for a complex portfolio which considers component projects and programmes within a design which has the flexibility to respond to changing priorities | 6.5.1.1 | Report |
| 1.5 adopt a ‘lessons learned’ approach to inform future portfolio design | 6.5.1.2 | Report |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 2: Manage and oversee the scope of a very complex portfolio considering the selection, configuration and sequencing of component projects and programmes** | | | | |
| 2.1 based on a potential or enacted portfolio components, structure the scope of a complex portfolio such that the scope of component projects and programmes are controlled | 6.5.3.1, 6.5.3.2, 6.5.14.1 |  |  | Report |
| 2.2 conduct programme and project oversight having prioritised programmes and projects which has been informed by organisational priorities and based on the characteristics of projects and programmes | 6.5.14.2, 6.5.14.3, 6.5.14.4 | Report |
| 2.3 establish the decision-making cycle for a complex portfolio | 6.5.4.1 | Report |
| 2.4 predict the future performance of a portfolio and recommend a future component mix for executive approval/rejection | 6.5.14.5, 6.5.14.6 | Report |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 3: Make appropriate and timely recommendations through regularly reporting on the status of a complex portfolio** | | | | |
| 3.1 manage and govern a procurement system | 6.5.9.1 |  |  | Report |
| 3.2 implement a quality approach for a complex portfolio and its component projects and programmes | 6.5.6.1 | Report |
| 3.3 establish a portfolio system | 6.5.10.1 | Report |
| 3.4 establish and maintain the portfolio cycle | 6.5.10.2 | Report |
| 3.5 regularly report on the status of the portfolio | 6.5.10.3 | Report |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 1: Align the portfolio to strategic objectives, corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.3 manage complex portfolios through portfolio management principles considering the implementation, by others, of project and programme management principles | 6.3.2.1, 6.3.2.2 |  |  | Oral examination |
| 1.4 manage complaint portfolios where relevant national and international standards and regulations are adhered to | 6.3.3.1, 6.3.3.2 | Oral examination |
| 1.5 ensure complex portfolios comply with relevant codes of conduct, professional regulation and sustainability principles | 6.3.3.3, 6.3.3.4 | Oral examination |
| 1.6 combine performance benchmarks with professional development to implement a continuous improvement culture | 6.3.3.5, 6.3.3.6 | Oral examination |
| 1.7 ensure the portfolio is aligned to human resource functions and processes, financial control functions and processes and its reporting and decision-making structures and quality management processes | 6.3.2.3, 6.3.2.4, 6.3.2.5 | Oral examination |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 3: Implement and maintain a governance framework in the context of a very complex portfolio which facilitates an effective information exchange between all stakeholders and is responsive to change drivers** | | | | |
| 3.1 establish a governance framework and structure where a portfolio’s stakeholder requirements, component projects and programmes, environment and location, influence organisational design | 6.5.5.1, 6.5.5.2 |  |  | Oral examination |
| 3.2 provide processes, systems and structures where information management and security are key considerations in a complex portfolio | 6.5.5.3 | Oral examination |
| 3.3 adjust a portfolio’s organisation structure, including component projects and programmes, in response to change drivers to ensure continual alignment with portfolio and organisational strategies | 6.5.5.4 | Oral examination |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex portfolio** | | | | |
| 3.1 apply appropriate power and leadership styles alongside coaching and mentoring techniques to influence the behaviour of others to achieve established and evolving goals |  |  |  | Oral examination |
| 3.2 positively inform the behaviours and actions of others through a proactive approach to supporting individuals and teams and through taking ownership of a complex portfolio’s objectives |  | Oral examination |
| 3.3 communicate a course of action based on informed decisions in situations where uncertainty influences actions |  | Oral examination |
| 3.8 anticipate individual and team needs to support effective operations in a healthy, save and productive, but complex, working environment |  | Oral examination |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 4: Support portfolio success through effective negotiation and conflict resolution** | | | | |
| 4.5 manage a complex portfolio effectively and efficiently, engaging with stakeholders to gain acceptance of portfolio goals, processes and outcomes | 6.4.10.4, 6.4.10.5 |  |  | Oral examination |
| 4.6 measure the impact of decisions and actions on the success of a very complex portfolio and the achievement of organisational objectives | 6.4.10.1 | Oral examination |
| **Unit 3: Implementing effective portfolio management in stable and uncertain environments**  **Learning Outcome 4: Effectively manage risk and opportunity within a very complex portfolio** | | | | |
| 4.1 identify risks and opportunities within a risk management framework | 6.5.11.1, 6.5.11.2 |  |  | Oral examination |
| 4.2 determine the impact of risks and opportunities through qualitative and quantitative assessments | 6.5.11.3 | Oral examination |
| 4.3 determine, monitor and evaluate appropriate strategies and response plans to address risks and opportunities for a complex portfolio | 6.5.11.4, 6.5.11.5 | Oral examination |
| **Unit 1: The impact of organisations on portfolio management**  **Learning Outcome 2: Deliver portfolio management strategies through others where individual and team power and influence are integrated into an organisation’s culture** | | | | |
| 2.1 consider the impact of individual personalities, working styles, ambitions and interests when establishing individual and team goals | 6.3.4.1, 6.3.4.3 |  |  | Interview |
| 2.2 determine the impact of formal and informal relationships and influences on complex portfolios | 6.3.4.2 | Interview |
| 2.3 consider the impact of societal culture and the informal culture and values of an organisation when developing portfolio plans and performance measures | 6.3.5.1, 6.3.5.3 | Interview |
| 2.4 align portfolio aims, objectives and plans with the organisation’s formal culture and values | 6.3.5.2 | Interview |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be an effective portfolio manager** | | | | |
| 1.1 use individual experiences and self-awareness to inform future performance, recognise area for improvement and build on existing strengths | 6.4.1.1, 6.4.1.2 |  |  | Interview |
| 1.2 support appropriate workplace behaviours through effective self-direction, goal setting, time management and organisational skills based on a continual desire to learn and develop within the context of a complex portfolio | 6.4.1.3, 6.4.1.4, 6.4.1.5 | Interview |
| 1.3 act ethically towards, and with responsibility for, own actions and decision making | 6.4.2.1, 6.4.2.3 | Interview |
| 1.4 deliver sustainable, complete and accurate outcomes through a consistent approach to decision making based on the context of a complex portfolio | 6.4.2.2, 6.4.2.4, 6.4.2.5 | Interview |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex portfolio** | | | | |
| 3.6 inform the strategies of a very complex portfolio through an open working relationship between and within teams where information sharing is used to promote conceptual thinking and a holistic view of the portfolio | 6.4.8.1, 6.4.8.2, 6.4.8.5 |  |  | Interview |
| 3.7 apply appropriate and analytical techniques to different, but complex, situations which require creative and alternative solutions | 6.4.8.3, 6.4.8.4 | Interview |
| **Unit 2: Delivering sustainable change through effective portfolio leadership and management**  **Learning Outcome 4: Support portfolio success through effective negotiation and conflict resolution** | | | | |
| 4.1 recognise and interpret existing and potential areas of conflict, being mindful of the possible impact on people, to inform appropriate responses and resolutions | 6.4.7.1, 6.4.7.2, 6.4.7.3 |  |  | Interview |
| 4.2 reflect on the impact, potential or real, of conflicts and crises to stimulate learning and strengthen team cohesion | 6.4.7.4 | Interview |

**IPMA Level B: Certified Senior Programme Manager Syllabus**

Accredited Providers are requested to provide an overview of their approach to training and development of candidates in each of the evidence columns below. The form this takes will vary but could include a variety of learning and development approaches. This could include; PowerPoint slides, gap analysis questionnaires with supplementary coaching sessions or planned schedules of developing candidates to meet the assessment criteria and assessment method. This list is not exhaustive.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** | **Report/Oral examination/**  **Interview** |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 1: Align the programme to strategic objectives, corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.1 translate an organisation’s mission, vision and strategy into appropriate management control measures | 5.3.1.1, 5.3.1.4 |  |  | Report |
| 1.2 support an organisation’s strategy through the implementation, monitoring and reporting of programme performance measures | 5.3.1.2, 5.3.1.3, 5.3.1.5 | Report |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 4: Set a strategy to ensure a complex programme is adequately resourced where organisational strategies are effectively and efficiently delivered** | | | | |
| 4.1 implement a strategic resource plan where financial forecasting, planning and supporting functions are key considerations when determining the quality and quantity of required resources for a very complex programme | 5.3.2.4, 5.3.2.6, 5.5.8.1, 5.5.8.2 |  |  | Report |
| 4.2 implement a financial management framework which embraces funding mechanisms and budgets | 5.5.7.1, 5.5.7.2, 5.5.7.3 | Report |
| 4.3 use a financial management, control and reporting system to distribute programme funds | 5.3.2.7, 5.5.7.4, 5.5.7.5 | Report |
| 4.4 effectively negotiate programme resources with appropriate stakeholders | 5.5.8.3 | Report |
| 4.5 follow a systematic approach to resource availability and distribution which facilitates corrective action to be taken when required | 5.5.8.4, 5.5.8.5 | Report |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 2: Inspire others through meaningful and engaging relationships employing open and inclusive communication** | | | | |
| 2.1 apply appropriate techniques which support and facilitate a structured and open approach to inclusive communication within a complex programme | 5.4.3.1, 5.4.3.2, 5.4.3.5 |  |  | Report |
| 2.2 determine appropriate communication methods considering the situation and audience, including virtual teams | 5.4.3.3, 5.4.3.4 | Report |
| 2.3 develop a network of internal and external contacts to establish relationships which will support the achievement of a complex | 5.4.4.1, 5.4.4.2, 5.4.4.5 | Report |
| 2.4 use appropriate techniques to understand the concerns of others thereby developing respectful and meaningful professional relationships | 5.4.4.3, 5.4.4.4 | Report |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex programme** | | | | |
| 3.4 establish an effective and efficient team where co-operation, internal networking and shared objectives lead to better performance based on a culture of empowerment within a complex programme | 5.4.6.1, 5.4.6.2, 5.4.6.4 |  |  | Report |
| 3.5 reflect on areas for improvement in performance to promote a culture of continuous improvement in individuals and teams | 5.4.6.3, 5.4.6.5 | Report |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 4: Support programme success through effective negotiation and conflict resolution** | | | | |
| 4.3 apply appropriate negotiation techniques to establish interests, needs and constraints which support the creation of a negotiation strategy to achieve objectives | 5.4.9.1, 5.4.9.2, 5.4.9.3 |  |  | Report |
| 4.4 achieve satisfactory agreements with others where exploiting new opportunities is a key negotiating factor | 5.4.9.4, 5.4.9.5 | Report |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 5: Support organisational change and transformation** | | | | |
| 5.1 consider an organisation’s capacity to change when establishing change requirements and transformation opportunities | 5.5.13.1, 5.5.13.2 |  |  | Report |
| 5.2 develop, implement and adapt a change or transformation strategy within the context of a complex programme | 5.5.1.5, 5.5.13.3, 5.5.13.4 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 1: Deliver a vision and strategy for a very complex programme where the approach employs networks, alliances and partnerships to build important stakeholder relationships and where lessons learned are key informants of future approaches** | | | | |
| 1.1 establish a benefits realisation strategy for the programme based on a stakeholder analysis, which embeds the programme’s goals and benefits hierarchy using recognised tools and techniques | 5.5.2.1, 5.5.2.2, 5.5.2.3, 5.5.12.1 |  |  | Report |
| 1.2 maintain networks, alliances or partnerships with primary stakeholders where they act as ambassadors or champions for a complex programme | 5.5.12.2, 5.5.12.5 | Report |
| 1.3 develop networks, alliances or partnerships with potential collaborators through the implementation of a stakeholder strategy and communication plan | 5.5.12.3, 5.5.12.4 | Report |
| 1.4 establish programme and component success criteria within a design which has the flexibility to respond to changing priorities | 5.5.1.1 | Report |
| 1.5 adopt a ‘lessons learned’ approach to inform future programme and component design | 5.5.1.2 | Report |
| 1.6 create a vision for the programme which informs a flexible programme management approach where complexity and consequences for the approach are key considerations | 5.5.1.3, 5.5.1.4, 5.5.1.6 | Report |
| 1.7 design an execution architecture and delivery strategy for a complex programme | 5.5.1.7, 5.5.1.8 | Report |
| 1.8 monitor the benefits achieved from components having first defined them their intended outcomes and their interfaces | 5.5.2.4, 5.5.2.5 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 2: Manage the scope of a very complex programme considering the configuration and sequencing of components** | | | | |
| 2.1 structure the scope of a very complex programme based on the proposed scope of its components, documenting decisions taken when selecting the components | 5.5.3.1, 5.5.3.2, 5.5.14.4 |  |  | Report |
| 2.2 maintain scope configuration through the effective management of the scope of components | 5.5.3.3, 5.5.3.4 | Report |
| 2.3 prioritise components based on their characteristics and programme priorities | 5.5.14.1, 5.5.14.2 | Report |
| 2.4 effectively sequence programme components into tranches | 5.5.4.1 | Report |
| 2.5 manage the consistency of tranches to ensure effective and smooth transition from one tranche to another | 5.5.4.2, 5.5.4.3 | Report |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 3: Establish, manage and finalise a programme within a complex context giving due consideration to partnerships, quality assurance and programme components** | | | | |
| 3.1 manage and govern a procurement system for a programme | 5.5.9.1 |  |  | Report |
| 3.2 develop and manage partnerships through the programme life cycle | 5.5.9.2, 5.5.9.3 | Report |
| 3.3 implement quality assurance measures based on a quality approach for a complex programme and its components | 5.5.6.1, 5.5.6.2 | Report |
| 3.4 establish a programme ensuring the interfaces and collaborations between programme components are effectively managed | 5.5.10.1, 5.5.10.2 | Report |
| 3.5 regularly evaluate the status of programme components and their performance adjusting the behaviour of components, when deviations from plan occur, to ensure components are delivering as intended | 5.5.10.3, 5.5.14.3 | Report |
| 3.6 provide direction to component managers | 5.5.10.4 | Report |
| 3.7 finalise a complex programme and its components when appropriate | 5.5.10.5 | Report |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 1: Align the programme to strategic objectives, corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.3 manage very complex programmes through programme management principles and within existing governance, structures and processes where a programme’s and an organisation’s decision making, reporting and quality are in alignment | 5.3.2.1, 5.3.2.5 |  |  | Oral examination |
| 1.4 manage compliant programmes and their components where relevant national and international standards and regulations are adhered to | 5.3.3.1, 5.3.3.2 | Oral examination |
| 1.5 ensure very complex programmes and their components comply with relevant codes of conduct, professional regulation and sustainability principles | 5.3.3.3, 5.3.3.4 | Oral examination |
| 1.6 combine performance benchmarks with professional development to implement a continuous improvement culture | 5.3.3.5, 5.3.3.6 | Oral examination |
| 1.7 determine the relationship between a programme and a portfolio of programmes where a relationship exists in a complex context | 5.3.2.2, 5.3.2.3 | Oral examination |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 3: Implement and maintain a governance framework in the context of a very complex programme which facilitates an effective information exchange between all stakeholders** | | | | |
| 3.1 establish a programme governance framework and structure where a programme’s stakeholders, context, environment and location influence organisational design | 5.5.5.1, 5.5.5.2 |  |  | Oral examination |
| 3.2 provide processes, systems and structures where information management and security are key considerations in complex programmes | 5.5.5.3 | Oral examination |
| 3.3 adjust a programme’s organisational structure in response to change drivers to ensure continual alignment with programme and organisational strategies | 5.5.5.4 | Oral examination |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex programme** | | | | |
| 3.1 apply appropriate power and leadership styles alongside coaching and mentoring techniques to influence the behaviour of others to achieve established and evolving goals | 5.4.5.3, 5.4.5.4 |  |  | Oral examination |
| 3.2 positively inform the behaviours and actions of others through a proactive approach to supporting individuals and teams and through taking ownership of a complex programme’s objectives | 5.4.5.1, 5.4.5.2 | Oral examination |
| 3.3 communicate a course of actions based on informed decisions in situations where uncertainty influences actions | 5.4.5.5 | Oral examination |
| 3.8 anticipate individual and team needs to support effective operations in a healthy, safe and productive but complex, working environment | 5.4.10.2, 5.4.10.3 | Oral examination |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 4: Support programme success through effective negotiation and conflict resolution** | | | | |
| 4.5 manage a complex programme effectively and efficiently, engaging with stakeholders to gain acceptance of programme goals, processes and outcomes | 5.4.10.4, 5.4.10.5 |  |  | Oral examination |
| 4.6 measure the impact of decisions and actions on the success of a complex programme and the achievement of organisational objectives | 5.4.10.1 | Oral examination |
| **Unit 3: Implementing effective programme management in stable and uncertain environments**  **Learning Outcome 4: Effectively manage risk and opportunity within a complex programme** | | | | |
| 4.1 identify risks and opportunities within a risk management framework | 5.5.11.1, 5.5.11.2 |  |  | Oral examination |
| 4.2 determine the impact of risks and opportunities through qualitative and quantitative assessments | 5.5.11.3 | Oral examination |
| 4.3 determine, monitor and evaluate appropriate strategies and response plans to address risk and opportunities for a complex programme | 5.5.11.4, 5.5.11.5 | Oral examination |
| **Unit 1: The impact of organisations on programme management**  **Learning Outcome 2: Deliver programme management strategies through others where individual and team power and influence are integrated into an organisation’s culture** | | | | |
| 2.1 consider the impact of individual personalities, working styles, ambitions and interests when establishing individual and team goals | 5.3.4.1, 5.3.4.3 |  |  | Interview |
| 2.2 determine the impact of formal and informal relationships and influences on very complex programmes | 5.3.4.2 | Interview |
| 2.3 consider the impact of societal culture and the informal culture and values of an organisation when developing programme plans and performance measures | 5.3.5.1, 5.3.5.3 | Interview |
| 2.4 align programme aims, objectives and plans with the organisation’s formal culture and values | 5.3.5.2 | Interview |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be an effective programme manager** | | | | |
| 1.1 use individual experiences and self-awareness to inform future performance, recognise areas for improvement and build on existing strengths | 5.4.1.1, 5.4.1.2 |  |  | Interview |
| 1.2 support appropriate workplace behaviours through effective self-direction, goal setting, time management and organisational skills based on a continual desire to learn and develop within the context of a complex programme | 5.4.1.3, 5.4.1.4, 5.4.1.5 | Interview |
| 1.3 act ethically towards, and with responsibility for, own actions and decision making | 5.4.2.1, 5.4.2.3 | Interview |
| 1.4 deliver sustainable, complete and accurate outcomes through a consistent approach to decision making based on the context of a complex programme | 5.4.2.2, 5.4.2.4, 5.4.2.5 | Interview |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex programme** | | | | |
| 3.6 inform the strategies of a very complex programme through an open working relationship between and within teams where information sharing is used to promote conceptual thinking and a holistic view of the programme | 5.4.8.1, 5.4.8.2, 5.4.8.5 |  |  | Interview |
| 3.7 apply appropriate analytical techniques to different but very complex situations which require creative and alternative solutions | 5.4.8.3, 5.4.8.4 | Interview |
| **Unit 2: Delivering sustainable change through effective programme leadership and management**  **Learning Outcome 4: Support programme success through effective negotiation and conflict resolution** | | | | |
| 4.1 recognise and interpret existing and potential areas of conflict, being mindful of the possible impact on people, to inform appropriate responses and resolutions | 5.4.7.1, 5.4.7.2, 5.4.7.3 |  |  | Interview |
| 4.2 reflect on the impact, potential or real, of conflict and crises to stimulate learning and strengthen team cohesion | 5.4.7.4 | Interview |

**IPMA Level B: Certified Senior Project Manager Syllabus**

Accredited Providers are requested to provide an overview of their approach to training and development of candidates in each of the evidence columns below. The form this takes will vary but could include a variety of learning and development approaches. This could include; PowerPoint slides, gap analysis questionnaires with supplementary coaching sessions or planned schedules of developing candidates to meet the assessment criteria and assessment method. This list is not exhaustive.

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| **Assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** | **Report/Oral examination/**  **Interview** |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 1: Align project strategies and organisational objectives to corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.1 align an organisation’s mission, vision and strategy into appropriate management control measures | 4.3.1.1, 4.3.1.4 |  |  | Report |
| 1.2 inform an organisation’s strategy through the monitoring and reporting of project performance measures | 4.3.1.2, 4.3.1.3, 4.3.1.5 | Report |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 4: Set a strategy to assure a complex project is adequately resourced where organisational strategies are effectively and efficiently delivered** | | | | |
| 4.1 implement a resource plan where financial forecasting, planning and supporting functions are key considerations when determining the quality and quantity of required resources for a complex project | 4.3.2.4, 4.3.2.6, 4.5.8.1, 4.5.8.2 |  |  | Report |
| 4.2 apply financial accounting techniques to determine project costs, funding and budgets | 4.5.7.1, 4.5.7.2, 4.5.7.3 | Report |
| 4.3 use a financial management, control and reporting system to identify and correct deviations | 4.3.2.7, 4.5.7.4, 4.5.7.5 | Report |
| 4.4 effectively negotiate project resources with appropriate stakeholders | 4.5.8.3 | Report |
| 4.5 follow a systematic approach to resource allocation which facilitates corrective action to be taken when required | 4.5.8.4, 4.5.8.5 | Report |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 2: Develop productive and engaging relationships where open and transparent communication plays a significant role within a complex project** | | | | |
| 2.1 apply appropriate techniques which support and facilitate a structured and open approach to inclusive communication within a complex project | 4.4.3.1, 4.4.3.2, 4.4.3.5 |  |  | Report |
| 2.2 determine appropriate communication methods considering the situation and audience, including virtual teams | 4.4.3.3, 4.4.3.4 | Report |
| 2.3 develop a network of internal and external contacts to establish relationships which will support he achievement of a very complex project’s vision and goals | 4.4.4.1, 4.4.4.2, 4.4.4.5 | Report |
| 2.4 use appropriate techniques to understand the concerns of others thereby developing respectful and meaningful professional relationships | 4.4.4.3, 4.4.4.4 | Report |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex project** | | | | |
| 3.4 establish an effective and efficient team where co-operation, internal networking and shared objectives lead to better performance based on a culture of empowerment within a complex project | 4.4.6.1, 4.4.6.2, 4.4.6.4 |  |  | Report |
| 3.5 reflect on areas for improvement in performance to promote a culture of continuous improvement in individuals and teams | 4.4.6.3, 4.4.6.5 | Report |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 4: Deliver project outcomes through effective negotiation and conflict resolution** | | | | |
| 4.3 apply appropriate negotiation techniques to establish interests, needs and constraints which support the creation of a negotiation strategy to achieve objectives | 4.4.9.1, 4.4.9.2, 4.4.9.3 |  |  | Report |
| 4.4 achieve satisfactory agreements with others where exploiting new opportunities is a key negotiating factor | 4.4.9.4, 4.4.9.5 | Report |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 5: Support organisational change and transformation** | | | | |
| 5.1 consider an organisation’s capacity to change when establishing change requirements and transformation opportunities | 4.5.13.1, 4.5.13.2 |  |  | Report |
| 5.2 develop and implement a change or transformation strategy within the context of a very complex project | 4.5.13.3, 4.5.13.4 | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 1: Utilise effective stakeholder engagement to deliver successful projects** | | | | |
| 1.1 prioritise project goals where requirements and acceptance criteria are based on a stakeholder analysis | 4.5.2.1, 4.5.2.2, 4.5.2.3, 4.5.12.1 |  |  | Report |
| 1.2 develop networks and alliances through the implementation of a stakeholder strategy and communication plan for a complex project | 4.5.12.2, 4.5.12.5 |  |  | Report |
| 1.3 engage effectively with key internal and external stakeholders to inform project progress | 4.5.12.3, 4.5.12.4 |  |  | Report |
| 1.4 establish project success criteria within a design which has the flexibility to respond to changing priorities | 4.5.1.1 |  |  | Report |
| 1.5 adopt a ‘lessons learned’ approach to inform future projects | 4.5.1.2 |  |  | Report |
| 1.6 select a project management approach which considers the complexity of a project and the impact of internal and external influences on that approach | 4.5.1.3, 4.5.1.4 |  |  | Report |
| 1.7 establish a project execution architecture based on an agreed approach to managing a complex project | 4.5.1.5 |  |  | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 2: Maintain the scope of a complex project ensuring time is scheduled efficiently to optimise project execution** | | | | |
| 2.1 structure the scope of a complex project based on definable project deliverables | 4.5.3.1, 4.5.3.2 |  |  | Report |
| 2.2 define project work packages which can be maintained within scope | 4.5.3.3, 4.5.3.4 | Report |
| 2.3 apply project management techniques to establish activities, work effort and activity duration to deliver a complex project | 4.5.4.1, 4.5.4.2 | Report |
| 2.4 apply appropriate planning techniques to sequence and schedule activities based on the selected project management approach | 4.5.4.3, 4.5.4.4 | Report |
| 2.5 apply schedule control systems to determine variances and inform scheduling adjustments within a complex project | 4.5.4.5 | Report |
| **Unit 3: Implementing effective project management in stable and uncertain environments**    **Learning Outcome 3: Plan and monitor the execution of a complex project to help ensure quality of process, product and output** | | | | |
| 3.1 work with stakeholders to determine procurement requirements, project suppliers and partners | 4.5.9.1, 4.5.9.2 (part) |  |  | Report |
| 3.2 prepare appropriate documentation to procure goods and services based on negotiated and agreed contractual terms and conditions | 4.5.9.3, 4.5.9.2 (part) | Report |
| 3.3 effectively manage contract performance taking appropriate and timely action when required | 4.5.9.4 | Report |
| 3.4 develop and implement an effective and efficient quality management plan which has the flexibility to respond to the outcomes of audits and any review of the quality of project deliverables throughout a project | 4.5.6.1, 4.5.6.2, 4.5.6.5 | Report |
| 3.5 work with key stakeholders to establish plans to verify project quality requirements, objectives and standards, and to validate project outcomes for a complex project | 4.5.6.3, 4.5.6.4 | Report |
| 3.6 start and execute a complex project based on an agreed project management plan which supports the transition to subsequent phases of a project | 4.5.10.1, 4.5.10.2 | Report |
| 3.7 implement a performance control cycle which informs appropriate reporting mechanisms | 4.5.10.3, 4.5.10.4 | Report |
| 3.8 implement agreed project changes following an appropriate assessment | 4.5.10.5 | Report |
| 3.9 close and evaluate a phase or a project | 4.5.10.6 | Report |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 1: Align project strategies and organisational objectives to corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | |
| 1.3 manage complex projects through project management principles and within existing governance, structures and processes where a project’s and an organisation’s decision making, reporting and quality are in alignment | 4.3.2.1, 4.3.2.5 |  |  | Oral  examination |
| 1.4 manage compliant projects where relevant national and international standards and regulations are adhered to | 4.3.3.1, 4.3.3.2 | Oral  examination |
| 1.5 ensure complex projects and project teams comply with relevant codes of conduct, professional regulation and sustainability principles | 4.3.3.3, 4.3.3.4 | Oral  examination |
| 1.6 combined performance benchmarks with professional development to support a continuous improvement culture | 4.3.3.5, 4.3.3.6 | Oral  examination |
| 1.7 determine the relationship between a project, a programme and/or a portfolio of projects where the relationship exists in a complex context | 4.3.2.2, 4.3.2.3 | Oral  examination |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 3: Develop a project structure which facilitates an effective information exchange between stakeholders of a complex project** | | | | |
| 3.1 establish a project structure where a project’s stakeholders, context, environment and location will influence organisational design | 4.5.5.1, 4.5.5.2 |  |  | Oral  examination |
| 3.2 establish communication processes which embraces communication models, methods and control mechanisms within a complex project | 4.5.5.3 | Oral  examination |
| 3.3 adjust a project’s organisational structure in response to change drivers to ensure continual alignment with project and organisational strategies | 4.5.5.4 | Oral  examination |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex project** | | | | |
| 3.1 apply appropriate power and leadership styles alongside coaching and mentoring techniques to influence the behaviour of others to achieve established and evolving goals | 4.4.5.3, 4.4.5.4 |  |  | Oral  Examination |
| 3.2 positively inform the behaviours and actions of others through a proactive approach to supporting individuals and teams and through taking ownership of a complex project’s objectives | 4.4.5.1, 4.4.5.2 | Oral  Examination |
| 3.3 communicate a course of action based on informed decisions in situations where uncertainty influences actions | 4.4.5.5 | Oral  examination |
| 3.8 anticipate individual and team needs to support effective operations in a healthy, safe and productive, but complex, working environment | 4.4.10.2, 4.4.10.3 | Oral  examination |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 4: Deliver project outcomes through effective negotiation and conflict resolution** | | | | |
| 4.5 manage a complex project effectively and efficiently, engaging with stakeholders to gain acceptance of project goals, processes and outcomes | 4.4.10.4, 4.4.10.5 |  |  | Oral  Examination |
| 4.6 measure the impact of decisions and actions on the success of a complex project and the achievement of organisational objectives | 4.4.10.1 | Oral  examination |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 4: Manage risk and opportunity within a complex project** | | | | |
| 4.1 identify risks and opportunities within a risk management framework | 4.5.11.1, 4.5.11.2 |  |  | Oral  examination |
| 4.2 determine the impact of risks and opportunities through qualitative and quantitative assessments | 4.5.11.3 | Oral  Examination |
| 4.3 determine, monitor and evaluate appropriate strategies and response plans to address risks and opportunities for a complex project | 4.5.11.4, 4.5.11.5 | Oral  examination |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 2: Deliver projects through others where collaborative relationships, individual and team power and influence are integrated into an organisation’s culture** | | | | |
| 2.1 consider individual personalities, working styles, ambitions and interests when establishing individual and team goals | 4.3.4.1, 4.3.4.3 |  |  | Interview |
| 2.2 determine the formal and informal impact of individuals and groups on a very complex project | 4.3.4.2 | Interview |
| 2.3 consider the impact of societal culture and the informal culture and values of an organisation when developing project plans and performance measures | 4.3.5.1, 4.3.5.3 | Interview |
| 2.4 align project aims, objectives and plans with the organisation’s formal culture and values | 4.3.5.2 | Interview |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be a trusted and reliable project manager** | | | | |
| 1.1 use individual experiences and self-awareness to inform future performance, recognise areas for improvement and build on existing strengths | 4.4.1.1, 4.4.1.2 |  |  | Interview |
| 1.2 support appropriate workplace behaviours through effective self-direction, goal setting, time management and organisational skills based on a continual desire to learn and develop within the context of a complex project | 4.4.1.3, 4.4.1.4, 4.4.1.5 | Interview |
| 1.3 act ethically towards, and with responsibility for, own actions and decision making | 4.4.2.1, 4.4.2.3 | Interview |
| 1.4 deliver sustainable, complete and accurate outcomes through a consistent approach to decision making based on a holistic view of a complex project and its context | 4.4.2.2, 4.4.2.4, 4.4.2.5, 4.4.8.5 | Interview |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a complex project** | | | | |
| 3.6 inform the strategies of a very complex project through an open working relationship between and within teams where information sharing is used to promote conceptual thinking | 4.4.8.1, 4.4.8.2 |  |  | Interview |
| 3.7 apply appropriate analytical techniques to different but very complex situations which require creative and alternative solutions | 4.4.8.3, 4.4.8.4 | Interview |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 4: Deliver project outcomes through effective negotiation and conflict resolution** | | | | |
| 4.1 recognise and interpret existing and potential areas of conflict, being mindful of the possible impact on people, to inform appropriate responses and resolutions | 4.4.7.1, 4.4.7.2, 4.4.7.3 |  |  | Interview |
| 4.2 reflect on the impact, potential or real, of conflicts and crises to stimulate learning and strengthen team cohesion | 4.4.7.4 | Interview |

**IPMA Level C: Certified Project Manager Syllabus**

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| **Learning outcomes and assessment criteria** | | **ICB4**  Key competence indicators: | | **Evidence** | | **Assessor Comment** | | **Examination/**  **Report/**  **Interview** |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 1: Align project strategies and organisation objectives to corporate governance, structures and processes giving appropriate consideration to relevant compliance requirements, standards and regulations** | | | | | | | | |
| 1.1 align an organisation’s mission, vision and strategy into appropriate management control measures | | 4.3.1.1, 4.3.1.4 | |  | |  | | Examination |
| 1.2 inform an organisation’s strategy through the monitoring and reporting of project performance measures | | 4.3.1.2, 4.3.1.3, 4.3.1.5 | |  | |  | | Examination |
| 1.3 manage moderately complex projects through project management principles and within existing governance, structures and processes where a project’s and an organisation’s decision making, reporting and quality are in alignment | | 4.3.2.1, 4.3.2.5 | |  | |  | | Examination |
| 1.4 manage compliant projects where relevant national and international standards and regulations are adhered to | | 4.3.3.1, 4.3.3.2 | |  | |  | | Examination |
| 1.5 ensure moderately complex projects and project teams comply with relevant codes of conduct, professional regulation and sustainability principles | | 4.3.3.3, 4.3.3.4 | |  | |  | | Examination |
| 1.6 combine performance benchmarks with professional development to support a continuous improvement culture | | 4.3.3.5, 4.3.3.6 | |  | |  | | Examination |
| 1.7 determine the relationship between a project, a programme and/or a portfolio of projects where the relationship exists in a moderately complex context | | 4.3.2.2, 4.3.2.3 | |  | |  | | Examination |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 3: Develop a project structure which facilitates an effective information exchange between stakeholders of a moderately complex project** | | | | | | | | |
| 3.1 establish a project structure where a project’s stakeholders, context, environment and location will influence organisational design | | 4.5.5.1, 4.5.5.2 | |  | |  | | Examination |
| 3.2 establish communication processes which embrace communication models, methods and control mechanisms within a moderately complex project | | 4.5.5.3 | |  | |  | | Examination |
| 3.3 adjust a project’s organisation structure in response to change drivers to ensure continual alignment with project and organisational strategies | | 4.5.5.4 | |  | |  | | Examination |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 4: Set a strategy to assure a moderately complex project is adequately resourced where organisational strategies are effectively and efficiently delivered** | | | | | | | | |
| 4.1 implement a resource plan where financial forecasting, planning and supporting functions and key considerations when determining the quality and quantity of required resources for a moderately complex project | | 4.3.2.4, 4.3.2.6, 4.5.8.1, 4.5.8.2 | |  | |  | | Examination |
| 4.2 apply financial accounting techniques to determine project costs, funding and budgets | | 4.5.7.1, 4.5.7.2, 4.5.7.3 | |  | |  | | Examination |
| 4.3 use a financial management, control and reporting system to identify and correct deviations | | 4.3.2.7, 4.5.7.4, 4.5.7.5 | |  | |  | | Examination |
| 4.4 effectively negotiate project resources with appropriate stakeholders | | 4.5.8.3 | |  | |  | | Examination |
| 4.5 follow a systematic approach to resource allocation which facilitates corrective action to be taken when required | | 4.5.8.4, 4.5.8.5 | |  | |  | | Examination |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 5: Support organisational change and transformation** | | | | | | | | |
| 5.1 consider an organisation’s capacity to change when establishing change requirements and transformation opportunities | | 4.5.13.1, 4.5.13.2 | |  | |  | | Examination |
| 5.2 develop and implement a change or transformation strategy within the context of a moderately complex project | | 4.5.13.3, 4.5.13.4 | |  | |  | | Examination |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be a trusted and reliable project manager** | | | | | | | | |
| 1.1 use individual experiences and self-awareness to inform future performance, recognise areas for improvement and build on existing strengths | 4.4.1.1, 4.4.1.2 | |  | |  | | Report | |
| 1.2 support appropriate workplace behaviours through effective self-direction, goal setting, time management and organisational skills based on continual desire to learn and develop within the context of a moderately complex project | 4.4.1.3, 4.4.1.4, 4.4.1.5 | |  | |  | | Report | |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 2: Develop productive and engaging relationships where open and transparent communication plays a significant role within a moderately complex project** | | | | | | | | |
| 2.3 develop a network of internal and external contacts to establish relationships which will support the achievement of a moderately complex projects vision and goals | 4.4.4.1, 4.4.4.2, 4.4.4.5 | |  | |  | | Report | |
| 2.4 use appropriate techniques to understand the concerns of others thereby developing respectful and meaningful professional relationships | 4.4.4.3, 4.4.4.4 | |  | |  | | Report | |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 3: Demonstrate inspirational leadership where the behaviour of individuals and teams are challenged and where empowerment is an explicit characteristic within a moderately complex project** | | | | | | | | |
| 3.1 apply appropriate power and leadership styles alongside coaching and mentoring techniques to influence the behaviour of others to achieve established and evolving goals | 4.4.5.3, 4.4.5.4 | |  | |  | | Report | |
| 3.2 positively inform the behaviours and actions of others through a proactive approach to supporting individuals and teams and through taking ownership of a moderately complex project’s objectives | 4.4.5.1, 4.4.5.2 | |  | |  | | Report | |
| 3.3 communicate a course of actions based on informed decisions in situations where uncertainty influences actions | 4.4.5.5 | |  | |  | | Report | |
| 3.4 establish an effective and efficient team where co-operation, internal networking and shared objectives lead to better performance on a culture of empowerment within a moderately complex project | 4.4.6.1, 4.4.6.2, 4.4.6.4 | |  | |  | | Report | |
| 3.5 reflect on areas for improvement in performance to promote a culture of continuous improvement in individuals and teams | 4.4.6.3, 4.4.6.5 | |  | |  | | Report | |
| 3.6 inform the strategies of a moderately complex project through an open working relationship between and within teams, where information sharing is used to promote conceptual thinking | 4.4.8.1, 4.4.8.2 | |  | |  | | Report | |
| 3.7 apply appropriate analytical techniques to different, but moderately complex, situations which require creative and alternative solutions | 4.4.8.3, 4.4.8.4 | |  | |  | | Report | |
| 3.8 anticipate individual and team needs to support effective operations in a healthy, safe and productive, but moderately complex, working environment | 4.4.10.2, 4.4.10.3 | |  | |  | | Report | |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 4: Deliver project outcomes through effective negotiation and conflict resolution** | | | | | | | | |
| 4.1 recognise and interpret existing and potential areas of conflict, being mindful of the possible impact on people, to inform appropriate responses and resolutions | 4.4.7.1, 4.4.7.2, 4.4.7.3 | |  | |  | | Report | |
| 4.2 reflect on the impact, potential or real, of conflicts and crises to stimulate learning and strengthen team cohesion | 4.4.7.4 | |  | |  | | Report | |
| 4.3 apply appropriate negotiation techniques to establish interests, needs and constraints which support the creation of a negotiation strategy to achieve objectives | 4.4.9.1, 4.4.9.2, 4.4.9.3 | |  | |  | | Report | |
| 4.4 achieve satisfactory agreements with others where exploiting new opportunities is a key negotiating factor | 4.4.9.4, 4.4.9.5 | |  | |  | | Report | |
| 4.5 manage a moderately complex project effectively and efficiently, engaging with stakeholders to gain acceptance of project goals, processes and outcomes | 4.4.10.4, 4.4.10.5 | |  | |  | | Report | |
| 4.6 measure the impact of decisions and actions on the success of a moderately complex project and the achievement of organisational objectives | 4.4.10.1 | |  | |  | | Report | |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 1: Utilise effective stakeholder engagement to deliver successful projects** | | | | | | | | |
| 1.1 prioritise project goals where requirements and acceptance criteria are based on a stakeholder analysis | 4.5.2.1, 4.5.2.2, 4.5.2.3, 4.5.12.1 | |  | |  | | Report | |
| 1.2 develop networks and alliances through the implementation of a stakeholder strategy and communication plan for a moderately complex project | 4.5.12.2, 4.5.12.5 | |  | |  | | Report | |
| 1.3 engage effectively with key internal and external stakeholders to inform project progress | 4.5.12.3, 4.5.12.4 | |  | |  | | Report | |
| 1.4 establish project success criteria within a design which has the flexibility to respond to changing priorities | 4.5.1.1 | |  | |  | | Report | |
| 1.5 adopt a ‘lessons learned’ approach to inform future projects | 4.5.1.2 | |  | |  | | Report | |
| 1.6 select a project management approach which considers the moderate complexity of a project and the potential impact of internal and external influences on that approach | 4.5.1.3, 4.5.1.4 | |  | |  | | Report | |
| 1.7 establish a project execution architecture based on an agreed approach to managing a moderately complex project | 4.5.1.5 | |  | |  | | Report | |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 2: Maintain the scope of a moderately complex project ensuring time is scheduled efficiently to optimise project execution** | | | | | | | | |
| 2.1 structure the scope of a moderately complex project based on definable project deliverables | 4.5.3.1, 4.5.3.2 | |  | |  | | Report | |
| 2.2 define project work packages which can be maintained within scope | 4.5.3.3, 4.5.3.4 | |  | |  | | Report | |
| 2.3 apply project management techniques to establish activities, work effort and activity duration to deliver a moderately complex project | 4.5.4.1, 4.5.4.2 | |  | |  | | Report | |
| 2.4 apply appropriate planning techniques to sequence and schedule activities based on the selected project management approach | 4.5.4.3, 4.5.4.4 | |  | |  | | Report | |
| 2.5 apply schedule control systems to determine variances and inform scheduling adjustments within a moderately complex project | 4.5.4.5 | |  | |  | | Report | |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 3: Plan and monitor the execution of a moderately complex project engaging with stakeholders to help ensure quality of process, product and output** | | | | | | | | |
| 3.1 work with stakeholders to determine procurement requirements, project suppliers and partners | 4.5.9.1, 4.5.9.2 (part) | |  | |  | | Report | |
| 3.2 effectively manage contract performance taking appropriate and timely action when required | 4.5.9.4 | |  | |  | | Report | |
| 3.3 work with key stakeholders to establish plans to verify project quality requirements, objectives and standards, and to validate project outcomes for a moderately complex project | 4.5.6.3, 4.5.6.4 | |  | |  | | Report | |
| 3.4 implement a performance control cycle which informs appropriate reporting mechanisms | 4.5.10.3, 4.5.10.4 | |  | |  | | Report | |
| 3.5 implement agreed project changes following an appropriate assessment | 4.5.10.5 | |  | |  | | Report | |
| 3.6 close and evaluate a phase or a project | 4.5.10.6 | |  | |  | | Report | |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 4: Manage risk and opportunity within a moderately complex project** | | | | | | | | |
| 4.1 identify risks and opportunities within a risk management framework | 4.5.11.1, 4.5.11.2 | |  | |  | | Report | |
| 4.2 determine the impact of risks and opportunities through qualitative and quantitative assessments | 4.5.11.3 | |  | |  | | Report | |
| 4.3 determine, monitor and evaluate appropriate strategies and response plans to address risks and opportunities for a moderately complex project | 4.5.11.4, 4.5.11.5 | |  | |  | | Report | |
| **Unit 3: Implementing effective project management in stable and uncertain environments**  **Learning Outcome 5: Manage procurement and quality in accordance with the agreed project management plan** | | | | | | | | |
| 5.1 prepare appropriate documentation to procure goods and services based on negotiated and agreed contractual terms and conditions | 4.5.9.3, 4.5.9.2 (part) | |  | |  | | Report | |
| 5.2 develop and implement an effective and efficient quality management plan which has the flexibility to respond to the outcomes of audits and any review of the quality of project deliverables throughout a project | 4.5.6.1, 4.5.6.2, 4.5.6.5 | |  | |  | | Report | |
| 5.3 start and execute a moderately complex project based on an agreed project management plan which supports the transition to subsequent phases of a project | 4.5.10.1, 4.5.10.2 | |  | |  | | Report | |
| **Unit 1: The impact of organisations on project management**  **Learning Outcome 2: Deliver projects through others where collaborative relationships, individual and team power and influence are integrated into an organisation’s culture** | | | | | | | | |
| 2.1 consider individual personalities, working styles, ambitions and interests when establishing individual and team goals | 4.3.4.1, 4.3.4.3 | |  | |  | | Interview | |
| 2.2 determine the formal and informal impact of individuals and groups on a moderately complex project | 4.3.4.2 | |  | |  | | Interview | |
| 2.3 consider the impact of societal culture and the informal culture and values of an organisation when developing project plans and performance measures | | 4.3.5.1, 4.3.5.3 |  | | |  | Interview | |
| 2.4 align project aims, objectives and plans with the organisation’s formal culture and values | | 4.3.5.2 |  | | |  | Interview | |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 1: Reflect on own actions, values and emotions to develop behaviours which are informed by integrity and the requirement to be a trusted and reliable project manager** | | | | | | | | |
| 1.3 act ethically towards, and with responsibility for, own actions and decision making | | 4.4.2.1, 4.4.2.3 |  | | |  | Interview | |
| 1.4 deliver sustainable, complete and accurate outcomes through a consistent approach to decision making based on a holistic view of a moderately complex project and its context | | 4.4.2.2, 4.4.2.4, 4.4.2.5, 4.4.8.5 |  | | |  | Interview | |
| **Unit 2: Delivering sustainable change through effective project leadership and management**  **Learning Outcome 2: Develop productive and engaging relationships where open and transparent communication plays a significant role within a moderately complex project** | | | | | | | | |
| 2.1 apply appropriate techniques which support and facilitate and structured and open approach to inclusive communication within a moderately complex project | | 4.4.3.1, 4.4.3.2, 4.4.3.5 |  | | |  | Interview | |
| 2.2 determine appropriate communication methods considering the situation and audience, including virtual teams | | 4.4.3.3, 4.4.3.4 |  | | |  | Interview | |

**IPMA Level D: Certified Project Management Associate Syllabus**

***Unit 1: The organisational, societal and political context of a project***

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| **Learning outcomes and assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** |
| **LO1: Manage a project through an understanding of strategy and strategic processes** | 4.3.1 |  |  |
| 1.1 how to align a project to an organisation’s mission and vision |  |  |  |
| 1.2 how to identify and exploit opportunities to influence organisational strategy |  |  |  |
| 1.3 how to develop and ensure the ongoing validity of the business/organisational  justification |  |  |  |
| 1.4 how to determine, assess and review critical success factors |  |  |  |
| 1.5 how to determine, assess and review key performance indicators |  |  |  |
| **LO2: Participate in and manage the impact of governance, structures and processes on projects** | 4.3.2 |  |  |
| 2.1 how the principles of project management are implemented |  |  |  |
| 2.2 how the principles of programme management are implemented |  |  |  |
| 2.3 how the principles of portfolio management are implemented |  |  |  |
| 2.4 the role of supporting functions available to a project manager |  |  |  |
| 2.5 how to align a project to an organisation’s decision making and reporting structures |  |  |  |
| 2.6 how to align a project to an organisation’s quality requirements |  |  |  |
| 2.7 how to align a project with human resource processes and functions |  |  |  |
| 2.8 how to align a project with finance and control processes and functions |  |  |  |
| **LO3: Influence and manage the alignment of a project to relevant standards and regulations** | 4.3.3 |  |  |
| 3.1 how to identify and ensure a project complies with identified and relevant legislation |  |  |  |
| 3.2 how to identify and ensure a project complies with all relevant health, safety, security and environmental regulations |  |  |  |
| 3.3 how to identify and ensure a project complies with all relevant codes of conduct and professional regulation |  |  |  |
| 3.4 how to identify and ensure a project complies with relevant sustainability principles and objectives |  |  |  |
| 3.5 how to assess, use and develop professional standards and tools for a project |  |  |  |
| **LO4: Use power and interest techniques to achieve stakeholder satisfaction and deliver agreed project outcomes** | 4.3.4 |  |  |
| 4.1 how to assess the impact of personal ambitions and interests of others on the project |  |  |  |
| 4.2 how to assess the impact of informal influence of individuals and groups on a project |  |  |  |
| 4.3 how to assess and employ the personalities and working styles of others for the benefit of a project |  |  |  |
| **LO5: Recognise the influence of internal and external culture on a project and integrate this into a project’s approach, objectives and processes** | 4.3.5 |  |  |
| 5.1 how to assess the culture and values of society and their implications for the project |  |  |  |
| 5.2 how to align the project with the formal culture and corporate values of an organisation |  |  |  |
| 5.3 how to assess the implications for a project of the informal culture and values of an organisation |  |  |  |

***Unit 2: The personal and social competences required to manage a project***

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| **Learning outcomes and assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** |
| **LO1: Reflect on and understand the impact of own emotions, behaviours, preferences and values on a project** | 4.4.1 |  |  |
| 1.1 how to identify and reflect on ways in which own values and experiences affect work |  |  |  |
| 1.2 how to build self-confidence of personal strengths and weaknesses |  |  |  |
| 1.3 how to identify and reflect on personal motivations to set personal goals and maintain focus |  |  |  |
| 1.4 how to organise own work based on resource availability and the situation |  |  |  |
| 1.5 how to take responsibility for own personal learning and development |  |  |  |
| **LO2: Maintain personal integrity through a consistent approach to decision making, actions and behaviours when managing project** | 4.4.2 |  |  |
| 2.1 how to take responsibility for own actions |  |  |  |
| 2.2 how to act, take decisions and communicate in a consistent way |  |  |  |
| 2.3 why it is important to complete tasks thoroughly to build confidence with others |  |  |  |
| **LO3: Communicate efficiently and effectively in a variety of situations, to different audiences and across cultures** | 4.4.3 |  |  |
| 3.1 how to provide clear and structured information to others and verify understanding |  |  |  |
| 3.2 how to facilitate and promote open communication |  |  |  |
| 3.3 how to choose a communication channel and style to meet the needs of an audience, situation and/or management level |  |  |  |
| 3.4 how to communicate effectively with virtual teams |  |  |  |
| **LO4: Build and maintain relationships, using personal engagement as the basis for collaboration** | 4.4.4 |  |  |
| 4.1 the importance of initiating and developing professional relationships |  |  |  |
| 4.2 the importance of building, facilitating and contributing to social networks |  |  |  |
| 4.3 the behaviours required to encourage collaborative working for the benefit of the project |  |  |  |
| **LO5: Lead, provide direction and motivate others to enhance individual and team performance** | 4.4.5 |  |  |
| 5.1 how to provide direction, coaching and mentoring to improve individual and team performance |  |  |  |
| 5.2 how to exert appropriate power and influence over others to achieve goals |  |  |  |
| 5.3 how to make, enforce and review decisions |  |  |  |
| **LO6: Effectively lead a team** | 4.4.6 |  |  |
| 6.1 how to select and build a team |  |  |  |
| 6.2 how to promote co-operation and networking between team members |  |  |  |
| 6.3 how to support, facilitate and review the development of the team and its members |  |  |  |
| 6.4 how to empower teams by delegating tasks and responsibilities |  |  |  |
| 6.5 how to recognise errors and mistakes to facilitate learning |  |  |  |
| **LO7: Take effective action in conflict situations** | 4.4.7 |  |  |
| 7.1 how to anticipate and possibly prevent conflicts and crises |  |  |  |
| 7.2 how to analyse the causes and consequences of conflicts and crises |  |  |  |
| 7.3 how to select appropriate responses to conflicts and crises |  |  |  |
| 7.4 how to mediate and resolve conflict and crises |  |  |  |
| 7.5 how to minimise the impact of conflict and crises |  |  |  |
| 7.6 how to use learning from conflicts and crises to improve future practice |  |  |  |
| **LO8: Find alternatives to and resolutions for uncertainty, problems, changes and limitations** | 4.4.8 |  |  |
| 8.1 how to stimulate and support an open and creative environment |  |  |  |
| 8.2 the importance of conceptual and creative thinking to define solutions to problems |  |  |  |
| 8.3 the benefits of applying analytical techniques to situations and financial and organisational and data trends |  |  |  |
| 8.4 the benefits of taking into account multiple perspectives |  |  |  |
| **LO9: Reach satisfactory agreements with others by using negotiation techniques** | 4.4.9 |  |  |
| 9.1 how to identify and assess the interests of all parties involved in the negotiation |  |  |  |
| 9.2 how to develop and evaluate options and alternatives to meet the needs of all parties |  |  |  |
| 9.3 how to define a mutually acceptable negotiation strategy in line with own objectives |  |  |  |
| 9.4 how to reach negotiated agreements with other parties which are in line with own objectives |  |  |  |
| **LO10: Focus on the agreed project outcomes and drive towards making the project a success** | 4.4.10 |  |  |
| 10.1 how to evaluate all decisions and actions against their impact on the success of a project |  |  |  |
| 10.2 how to balance needs and means to optimise outcomes and success |  |  |  |
| 10.3 how to promote and sell the project, its processes and outcomes |  |  |  |
| 10.4 how to deliver results and get acceptance |  |  |  |

***Unit 3: The organisational influences and demands on the management of a project***

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| **Learning outcomes and assessment criteria** | **ICB4**  Key competence indicators: | **Evidence** | **Assessor Comment** |
| **LO1: Successfully integrate all contextual and social aspects to determine the most advantageous approach for a project to ensure buy-in and success** | 4.5.1 |  |  |
| 1.1 how to acknowledge, prioritise and review success criteria |  |  |  |
| 1.2 how to review, apply and exchange lessons learned from and with other projects |  |  |  |
| 1.3 how to select and review the overall project management approach |  |  |  |
| 1.4 the benefits of producing a high-level project overview |  |  |  |
| **LO2: Establish the relationship between stakeholder expectations and project outcomes** | 4.5.2 |  |  |
| 2.1 how to define and develop the project goal hierarchy |  |  |  |
| 2.2 how to identify and assess project stakeholder needs and requirements |  |  |  |
| 2.3 how to prioritise and decide the requirements and acceptance criteria |  |  |  |
| **LO3: Manage the scope of a project** | 4.5.3 |  |  |
| 3.1 how to define the project deliverables |  |  |  |
| 3.2 how to structure the project scope |  |  |  |
| 3.3 how to define the project’s work packages |  |  |  |
| 3.4 how to establish and maintain scope configuration |  |  |  |
| **LO4: Schedule project activities to achieve the optimum time execution** | 4.5.4 |  |  |
| 4.1 how to establish the activities required to deliver a project |  |  |  |
| 4.2 how to determine the work effort and duration of activities |  |  |  |
| 4.3 how to decide on a schedule and stage approach |  |  |  |
| 4.4 how to sequence project activities and create a schedule |  |  |  |
| 4.5 how to monitor progress against the schedule, adjusting if necessary |  |  |  |
| **LO5: How to implement, monitor and review the organisation of a project** | 4.5.5 |  |  |
| 5.1 how to define the structure, roles and responsibilities within a project |  |  |  |
| 5.2 how to establish infrastructure, processes and systems for information flow |  |  |  |
| 5.3 the benefits of regularly reviewing the temporary organisation of a project during the project life cycle |  |  |  |
| **LO6: Establish and manage the quality of the deliverables** | 4.5.6 |  |  |
| 6.1 how to develop a quality management plan |  |  |  |
| 6.2 how to monitor and revise a quality management plan |  |  |  |
| 6.3 the importance of reviewing the project deliverables to ensure they meet the requirements of the quality management plan |  |  |  |
| 6.4 how to ensure quality throughout the project |  |  |  |
| **LO7: Ensure that financial resources are budgeted, monitored, reported and properly used during the project** | 4.5.7 |  |  |
| 7.1 how to estimate project costs |  |  |  |
| 7.2 how to establish a project’s budgets |  |  |  |
| 7.3 how to secure project funding |  |  |  |
| 7.4 how to maintain a financial management and reporting system for the project |  |  |  |
| 7.5 how to monitor project financials to identify and correct deviations from plan |  |  |  |
| **LO8: Ensure required resources are available and appropriately assigned** | 4.5.8 |  |  |
| 8.1 how to develop a strategic resource plan to deliver a project |  |  |  |
| 8.2 how to define the quality and quantity of required resources |  |  |  |
| 8.3 how to identify the potential sources of required resources |  |  |  |
| 8.4 how to negotiate the acquisition of required resources |  |  |  |
| 8.5 how to allocate and distribute resources to meet the requirement |  |  |  |
| 8.6 how to evaluate the use of resources and take necessary corrective actions |  |  |  |
| **LO9: Obtain the best value possible from suppliers and partners to meet project objectives** | 4.5.9 |  |  |
| 9.1 how to agree procurement requirements, options and processes |  |  |  |
| 9.2 how to contribute to the evaluation and selection of suppliers and partners |  |  |  |
| 9.3 how to contribute to the negotiation and agreement of contractual terms and conditions |  |  |  |
| 9.4 how to supervise the executions of contracts, address issues and seek redress where necessary |  |  |  |
| **LO10: Establish and maintain a balanced and integrated view over the management of a project** | 4.5.10 |  |  |
| 10.1 how to develop and get agreement on the project plan |  |  |  |
| 10.2 how to initiate and manage the transition to a new phase of the project |  |  |  |
| 10.3 how to control performance against the project plan and take remedial action where necessary |  |  |  |
| 10.4 how to report on progress |  |  |  |
| 10.5 how to assess, get agreement on, and implement project changes |  |  |  |
| 10.6 how to close and evaluate project phase or project |  |  |  |
| **LO11: Effectively manage risks and opportunities** | 4.5.11 |  |  |
| 11.1 how to develop and implement a risk management framework |  |  |  |
| 11.2 how to identify project risks and opportunities |  |  |  |
| 11.3 how to assess the probability and impact of risks and opportunities |  |  |  |
| 11.4 how to select strategies and implement response plans to address ricks and opportunities |  |  |  |
| 11.5 how to evaluate and monitor risks and opportunities and implement responses |  |  |  |
| **LO12: Engage with stakeholders to effectively manage their influence, interests and expectations** | 4.5.12 |  |  |
| 12.1 how to identify stakeholders |  |  |  |
| 12.2 how to assess stakeholder interest and influences |  |  |  |
| 12.3 how to develop and maintain a stakeholder strategy and communication plan |  |  |  |
| 12.4 how to engage with executive, sponsors and higher management to gain commitment and manage interests and expectations |  |  |  |
| 12.5 how to engage with users, partners, suppliers and other stakeholders to gain their co-operation and commitment |  |  |  |
| 12.6 how to organise and maintain networks and alliances |  |  |  |
| **LO13: Achieve benefits and goals of the project** | 4.5.13 |  |  |
| 13.1 the impact of change from the delivery of project outcomes and possible organisational resistance |  |  |  |
| 13.3 different approaches to overcoming resistance to change |  |  |  |
| 13.3 different approaches to overcoming resistance to change |  |  |  |