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| D:\IPMA\Website\Intranet\323 Official Graphics\IPMA_full_logo_sm.png | Executive Summary Report  for IPMA Level A or B candidate, PORTFOLIO Management |  |

***Please consider the environment before printing this document***

Purpose

The purpose of this document is to provide direction on how to prepare the executive summary report for IPMA level A or B candidates working in portfolio management.

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| **Candidate name** |  | |
| **Level applied for (check one)** | IPMA Level A | IPMA Level B |

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| Description of employer’s organisation | | | |
| Organisation (customer) name: |  | | |
| Number of employees | < 250 | 250 – 5000 | > 5000 |
| Main sector organisation operates in | E.g. software development, banking | | |
| Sector in which the portfolio operates |  | | |
| Role of applicant within employer’s organisation | | | |
| An organisational chart with applicant’s position identified |  | | |
| Area(s) of responsibility |  | | |
| An overview of the portfolio management processes/procedures used |  | | |

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| **Summary for all portfolios** | | | |
| Name of the portfolio | Start date of your involvement | Finish date of your involvement | Duration (months) |
| Portfolio #1 |  |  |  |
| Portfolio #2 |  |  |  |
| Portfolio #3 |  |  |  |

Add more lines if applicable

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| Summary of portfolio #1  (max one page) | |
| Portfolio strategical alignment | Describe how the portfolio is aligned with the mission, vision and strategy of the organisation, what are the objectives and planned benefits of the portfolio. |
| Your workload (% of total) |  |
| Total budget |  |
| Resources available | Describe available resources (people, equipment, materials, infrastructure, tools and other assets). |
| Stakeholders | Relationship with internal and external stakeholders. |
| Description of portfolio management | Describe the organisation of the portfolio and its component projects and programmes.  Describe the methods, tools, techniques and documents used for portfolio management. |
| Description of portfolio management challenges | Describe how you have managed the portfolio and how you met the complexity criteria. You can use the STAR approach (Situation, Task, Action, Result) in order to structure the report.   * Situation/challenge * Effort to deal with it * Outcome * Reference to competence elements   You can include the links to the information in complexity criteria form |

Please copy and fill in relevant parts of this report according to your needs to cover your experience.