

Projects Director Report Guidelines

IPMA Level A

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Classification	© PMAC-AGPC, public
Status	Version 1.1 Released
Electronic file	5125-A-PROC-Projects-Director-Report-Guidelines-11

Released by	Last name	Date	Signature
PMAC-AGPC CB management	Selver	December 21, 2012	

Version	Changes	By	Date
1.1	Updated file structure & added IPMA logo	Selver	December 21, 2012

1. General provisions

1.1. Object

The Projects Director Report is an opportunity for candidates to show that they have sufficient competence to coordinate and monitor all of the projects and project management of a company or other organisation, organisational unit or programme overall, and that they are able to adopt a correct technical and methodological approach to management by projects.

1.2. Basis

The Projects Director Report is based on the project portfolio/programme description submitted along with the self-assessment form and evaluated by the assessors.

1.3. Confidentiality

All information and documents submitted by candidates are treated in strict confidence by the certification body. The documents are accessible only to authorised individuals at the certification body, the assigned assessors (and the appeals committee, in the event of an appeal), but not to the candidate.

1.4. Rights

The candidate authorises the certification body and assessors to obtain supplementary information on statements from the referees listed (employer, customer, etc). The candidate is personally responsible for all copyright and similar issues relating to his or her organisation, projects and the documents used.

1.5. Signature

The candidate confirms by signing that all details provided are accurate and that he or she accepts the general provisions.

1.6. Administrative provisions

The project portfolio/programme description and the Projects Director Report must be submitted to the PMAC-AMPC CB office **in duplicate** by the date stated. Any delay in submitting the documents is subject to the provisions of section 5.7 of the Guidelines (Delays and extensions).

2. Project portfolio / programme description

2.1. Introduction

"Management by projects" is a central management concept that is applied by parent organisations, especially project-oriented companies. A large number of different projects are started, managed and completed in parallel. Management by projects comprises project portfolio management (or multi-project management) and programme direction.

Where projects are coordinated and monitored overall by a single person or office (such as the Projects Director), the constellation is described as a **project portfolio**. Examples of project portfolios include all major customer orders in a wide-ranging company division, all of a company's own projects or all of a city administration's construction investments. Project portfolios may comprise complex projects and programmes in addition to projects of limited complexity.

A **programme** is made up of a whole array of associated plans, as well as further action to achieve an overarching objective (strategy). Examples here include the reorganisation of a product area, a campaign to combat addiction, measures to reduce noise emissions throughout a rail network or the standardisation, collection and evaluation of information in a complex specialist field. Unlike a complete project (with sub-projects), deliverables, deadlines and costs are initially left open. Furthermore, in some cases projects are not defined until the programme is actually in progress. However, an overall outcome – in line with strategic objectives – must be achieved within a set period and the programme concluded.

The project portfolio/programme description helps assessors decide if:

- The project portfolio or programme which the candidate wishes to address in his or her Projects Director Report is sufficiently complex and important
- The candidate has exercised the lead management functions of coordination and monitoring in this project portfolio, or he or she has acted as programme manager or as lead project management consultant for this programme.

The requirement that a project portfolio or programme be "complex" is assessed according to the following criteria:

- An important group of projects is contained in the portfolio or programme, and the candidate is responsible for coordinating and directing them.
- The candidate proposes to the overseeing body for their decision (or where appropriate decides himself) the start, priority, continuation or interruption and termination of the projects of his portfolio or programme.
- The candidate is responsible for the selection and continuing development of project management requirements, processes, methods, techniques, tools, regulations and guidelines in the organisation as well as for the implementation of project management in general, in his range of projects.
- The candidate coordinates and influences (or is responsible for) the selection, training and employment of the project managers who manage his range of projects as well as for their performance appraisal and remuneration.
- The candidate is responsible for the coordination of all projects of his portfolio or programme and ensuring their compliance to the strategy of the business/organisation, as well as for establishing professional control and reporting mechanisms for his range of projects.
- The number, variety and complexity of active projects in the portfolio or programme and the number of project managers he controls.

The portfolio or programme must be "important" enough to provide evidence of competent management. The important parameters to consider are:

- Amount of time the candidate dedicates to the portfolio or programme
- Number of active projects
- Different kinds and sizes of projects
- Complexity of projects
- Number of project managers and size of organisational unit
- Annual amount of investment in the portfolio or programme

2.2. Choice of project portfolio or programme

In choosing the project portfolio or programme, the following points must be considered:

- It must be a real area of competence in which the candidate has exercised a lead project portfolio management function or a real programme in which he or she has acted as programme manager or lead project management consultant
- A large number of projects of different types should have been in progress in the organisation or organisational unit, or in the programme, with it being the task of the candidate to coordinate and monitor them
- The project portfolio or programme should be a recent one (as a rule not concluded more than two years ago) and the candidate must have been involved in it for at least 3 years
- The candidate should have proposed the initiation, prioritisation, continuation or cancellation and the conclusion of the projects in his or her project portfolio or programme to the management of the organisation or organisational unit, or the programme client (or decided on such matters him or herself)
- The candidate should have been responsible for the selection and ongoing development of project management requirements, processes, methods, tools and regulations, as well as for the use of project management skills in general, in his or her project area
- The candidate should have coordinated and influenced the training and deployment of the project managers, as well as salary policy and staff development as it related to these persons, and the candidate should also have been involved in project manager staff reviews and setting objectives with them.
- The candidate should have been responsible for inter-project coordination and should also have been in charge of ensuring professional controlling and reporting for the projects covered by his or her project portfolio or programme, bearing in mind the strategy of the organisation, organisational unit or programme
- The organisation, organisational unit or programme covered by the Projects Director Report may not previously have been submitted for any similar form of certification, neither may the Projects Director Report be circulated in a similar form for publication in any other way.

2.3. Content of the project portfolio/programme description

The project portfolio/programme description must clearly show that the Projects Director Report demonstrates the **application of project management skills**, comprising a very large number of experience and knowledge elements from various sections of the ICB.

The project portfolio/programme description should include the following information:

- Industry, type of project, list of projects
- Scope and importance of the project portfolio/programme, and its project management culture
- Management of the organisation or organisational unit, or the programme customer, contact persons
- Structure for coordinating and monitoring the project portfolio/project management, candidate's position
- Business case, business plan, business decision: feasibility, viability and fundability of the projects
- Recommendations to management or the project commission or steering committee: initiation, prioritisation, evaluation, continuation, cancellation and conclusion of projects
- Requirements, processes, methods, tools and regulations for project management, including their provision, maintenance and ongoing development

- Training, deployment, development and support for project management personnel, planning and coordination of additional resources (specialists, networks, information and communication, etc.)
- Coordination between projects and their alignment with the strategy or development/ master plan of the organisation, as well as with the project context
- Planning, presentation, communication, monitoring and controlling of projects
- Connection with general management areas.

The project portfolio or programme itself should merely be outlined **in brief**. The objective is to assess how the project portfolio or programme was managed.

The project portfolio/programme description should be between **4 and max. 5 Letter format pages** long.

2.4. References

Give at least two people as references, providing the following information:

- Last name
- First name
- Company name, address
- Current telephone number
- Position/role of the reference person in this project portfolio or programme.

3. Projects Director Report

3.1. Contents

The Projects Director Report shows the application of project management skills, comprising a large number of experience and knowledge elements from various sections of the ICB. The following figures are intended as a guideline:

Area	Application of PM in	Interview coverage
Technical	Minimum of 14 elements	Minimum of 5 elements
Behavioural	Minimum of 11 elements	Minimum of 4 elements
Contextual	Minimum of 8 elements	Minimum of 4 elements
TOTAL	Minimum of 33 elements	Minimum of 13 elements

The report must be organised so that the application of project management competencies is clearly evident in terms of the different elements of the ICB (referenced in the Projects Director Report).

The following should also be clearly shown:

- The circumstances leading to the project portfolio or programme
- The candidate's own activities, responsibilities and experience
- The project management team and management responsibility
- The ability to ask the right questions and get answers.

3.2. Report structure

The following is an example of how to structure a Projects Director Report, with particular reference to the **candidate's contribution to project portfolio / programme management**.

This structure is to be regarded as a proposal and may be adapted where circumstances so require.

1. Introduction or summary
2. Scope and importance of the project portfolio/programme
3. Organisational chart for the customer and project portfolio/programme; candidate's duties and responsibilities
4. Provision, maintenance and ongoing development of requirements, processes, methods, tools and regulations for project management; use of manuals, standards and guidelines
5. Development and implementation of project management methods and aids
6. Management by projects for the project portfolio/programme, benchmarking
7. Business plans/business cases for the project portfolio/programme
8. Project development, project evaluation, prioritisation, milestones, congruence with strategy and context
9. Project goals and strategies, project task definition and success monitoring
10. Forms of organisation for projects; roles, responsibilities, contracts
11. Management and decision-making systems, conflict and crisis management, negotiations
12. Training and selection of project management personnel, including staff development and support
13. Project structures and delineation between projects
14. Annual programme for the management team of the project portfolio or programme, and recommendations to the next higher body
15. Planning and controlling of deliverables, deadlines, costs, resources and finances
16. Change systems, risks and security
17. Links to parent organisation, marketing, accounting, quality management, legal affairs
18. System management, life cycles, change management
19. Project information and documentation, communications, reporting
20. Special features of the management by projects approach in the present case
21. Project management status in the candidate's area of responsibility, results and analysis of the candidate's own management by projects
22. Conclusions

3.3. Format

The cover and last page of the Projects Director Report must be in the same format as the enclosed samples (annexes 1 & 2).

The cover page must be followed by a table of contents indicating the structure of the document.

The text should comprise between **15 to 30 Letter format** pages, plus a maximum of 20 pages of annexes. The number of pages relates to a report produced with a font size of 11 pts.

At the end of the report there must be a list of references showing the technical literature used, including internal manuals, directives and guidelines, whether these are cited in the report or not.

In the case of published documents, a citation or inclusion in the list of references is sufficient. Internal company documents used in producing the Projects Director Report should, under certain circumstances, be brought to the interview.

3.4. Use

Both copies are distributed to the assessors. They are subsequently filed at the PMAC-AMPC CB offices with the candidate's other documents. The certification office may only

make use of the content or make further copies with the candidate's consent. In the event of an appeal, the appeals committee will refer to the candidate's file in its deliberations.

4. Annexes

4.1. Annex 1

Cover page for Projects Director Report

Last name, first name:

Projects Director Report

for certification of projects directors (IPMA Level A)

Place, date:

4.2. Annex 2

Last page of Project Directors Report

I declare that I have produced the present document without outside help, identified the literature used, and that the project portfolio/programme it describes has not been submitted elsewhere for competence certification or published in this form.

Place, date:

Signature: