

Appendix (2/3)

Name of Candidate:
Organization:

Date:
Job:

*Each Applicant shall submit a Full Self-Assessment Report Based on Bloom's Taxonomy
Score: Low (1) - High (6) - Click (√) on the box which is suitable to your competne level*

Competence Elements	Portfolio KCIs	Competence level & Score					
		Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
1. Perspective		1	2	3	4	5	6
6.3.1 Strategy	1. Align with Organizational Mission & Vision						
	2. Identify and exploit opportunities to influence organizational strategy						
	3. Develop and ensure the Ongoing validity of the business/ organizational justification						
	4. Determine, assess and review critical success factors						
	5. Determine, assess and review KPIs						
6.3.2 Governance, Structures & Processes	6. know the principals of portfolio management and the way they are implemented and apply						
	7. know and apply the principals of project and program management and the way they are implemented						
	8. Align the portfolio with the organization's reporting and decision making structures and quality Management processes						
	9. Align the portfolio with human resources processes and functions						
	10. Align the program with finance and control processes and functions						
6.3.3 Compliance, standards and regulations	11. Identify and ensure that the portfolio complies with all relevant legislation						
	12. Identify and ensure that the portfolio complies with all relevant health, safety, security and environmental regulations (HSSE)						
	13. Identify and ensure that the portfolio complies with all relevant codes of conduct and professional regulations.						
	14. Identify and ensure that the portfolio complies with relevant sustainability principals and objectives.						
	15. Assess, use and develop professional standards and tools for the portfolio						
	16. Assess, benchmark and improve the organizational portfolio management competence						
6.3.4 Power & Interest	17. Assess the personal ambitions and interests of others and potential impact of these on the portfolio						
	18. Assess the informal influence of individuals and groups and its potential impact on the portfolio						
	19. Assess the personalities and working styles of others and employ them to the benefit of the portfolio						
6.3.5 Culture & Values	20. Assess the culture and values of society and their implications for the portfolio						
	21. Align the portfolio with the formal culture and corporate values of the organization						
	22. Assess the informal culture and values of the organization and their implications for portfolio						
Portfolio Perspective Score (22 – 132)							

Competence Elements	Portfolio KCIs	Competence level & Score					
		Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
2. People		1	2	3	4	5	6
6.4.1 Self-reflection & Self-Management	1. Identify and reflect on the ways in which own values and experience affect the work						
	2. Build self-confidence on the basis of personal strengths and weakness						
	3. Identify and reflect on Personal motivation to set personal goals and keep focus.						
	4. Organize personal work depending on situation and own resources						
	5. Take responsibility for personal learning and development						
6.4.2 Personal Integrity & Reliability	6. Acknowledge and apply ethical values to all decisions and actions						
	7. Promote sustainability of outputs and outcomes						
	8. Take responsibility for own decisions and actions						
	9. Act, take decisions and communicate in consistent way						
6.4.3 Personal Communication	10. Complete tasks thoroughly in order to build confidence with others						
	11. Provide clear and structured information to others and verify their understanding						
	12. Facilitate and promote open communication						
	13. Choose communication styles and channels to meet the needs of the audience, situation and management level						
	14. Communicate effectively with virtual teams						
6.4.4 Relationships & Engagement	15. Employ humour and sense of perspective when appropriate						
	16. Initiate and develop personal and professional relationships						
	17. Build, facilitate and contribute to social network						
	18. Demonstrate empathy through listening, understanding and support						
	19. Show confidence and respect by encouraging others to share their opinions or concerns						
6.4.5 Leadership	20. Share own vision and goals in order to gain the engagement and commitment of others						
	21. Initiate actions and proactively offer help and advice						
	22. Take ownership and show commitment						
	23. Provide direction, coaching and mentoring to guide and improve the work of individuals and teams						
	24. Exert appropriate power and influence over others to achieve the goals						
6.4.6 Teamwork	25. Make, enforce and review decisions						
	26. Select and built the team						
	27. Promote cooperation and networking between team members						
	28. Support, facilitate and review the development of the team and its members						
	29. Empower teams by delegating tasks and responsibilities						
	30. Recognize errors to facilitate learning from mistakes						

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		Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
2. People (cont.)		1	2	3	4	5	6
6.4.7 Conflict & Crisis	31. Anticipate and possibly prevent conflicts and crises						
	32. Analyze the causes and consequences of conflicts and crises and select appropriate responses						
	33. Mediate and resolve conflicts and crises and/or their impacts						
	34. Identify and share learning from conflicts and crises in order to improve future practice.						
6.4.8 Resource fullness	35. Stimulate and support an open and creative environment						
	36. Apply conceptual thinking to define situations and strategies						
	37. Apply analytic techniques to analyzing situations, financial and organizational data and trends						
	38. Promote and apply creative techniques to find alternatives and solutions						
6.4.9 Negotiation	39. Promote a holistic view of the portfolio and its context to improve decision-making						
	40. Identify and analyze the interests of all parties involved in the negotiation						
	41. Develop and evaluate options and alternatives with the potential to meet the needs of all parties						
	42. Define a negotiation strategy in line with own objectives that is acceptable to all parties involved						
	43. Reach negotiated agreements with other parties that are in line with own objectives						
6.4.10 Result Orientation	44. Detect and exploit additional selling and acquisition possibilities						
	45. Evaluate all decisions and actions against their impact on portfolio success and the objectives of the organization						
	46. Balance needs and means to optimize outcomes and success						
	47. Create and maintain a healthy, safe and productive working environment						
	48. Promote and “sell” the portfolio, its processes and outcomes						
	49. Deliver results and get acceptance						
Portfolio People Score (49 – 294)							

Competence Elements	Portfolio KCIs	Competence level & Score					
		Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
	3. Practice	1	2	3	4	5	6
6.5.1 Portfolio Design	1. Acknowledge, prioritize and review success criteria						
	2. Review, apply and exchange lessons learned from and with other portfolios						
6.5.2 Benefits	3. Define and develop the organizational goals hierarchy						
6.5.3 Scope	4. Establish and maintain the scope of the portfolio						
	5. control scope configuration of projects and programs						
6.5.4 Time	6. Establishes the portfolio decision-making cycle						
6.5.5 Organization & Information	7. Assess and determine the needs of stakeholders relating to information.						
	8. Define the structure, roles and responsibilities within the portfolio and component projects and program						
	9. Establish infrastructure, processes and systems for information flow						
	10. Implement, monitor and maintain the organization of the portfolio and component projects and programs.						
6.5.6 Quality	11. Ensure quality throughout the portfolio component projects and program						
6.5.7 Finance	12. Determine and Establish the portfolio budget						
	13. Develop, establish and govern a financial performance and reporting system for portfolio.						
6.5.8 Resources	14. Develop strategic resource plan to deliver the portfolio component projects and programs						
	15. Identify the quantity of required and available resources for running portfolio component projects and programs						
	16. Identify the skills of the required resources for running portfolio component projects and programs						
6.5.9 Procurement and partnership	17. Maintain and govern the procurement system for the portfolio						
6.5.10 Plan & Control	18. Establish the portfolio system.						
	19. Establish and maintain the portfolio cycle						
	20. Report on the portfolio						
6.5.11 Risk & opportunities	21. Develop and implement a risk management framework						
	22. Identify risks and opportunities						
	23. Assess the probability and impact of risks and opportunities						
	24. Select strategies and implement treatment plan to address risks and opportunities						
	25. Evaluate and monitor risks, opportunities and implemented responses						

Competence Elements	Portfolio KCIs	Competence level & Score					
		Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
	3. Practice (cont.)	1	2	3	4	5	6
6.5.12 Stakeholders	26. Identify stakeholders and analyze their interests and influence						
	27. Develop and maintain a stakeholder strategy and communication plan						
	28. Engage with the executive, sponsors and higher management to gain commitment and to manage interests and expectations.						
	29. Engage with users, partners, suppliers and other stakeholders to gain their cooperation and commitment						
	30. Organize and maintain networks and alliances						
6.5.13 Change & transformation	31. Assess and review the impacts of changes affecting the portfolio.						
	32. Develop change or transformation strategy for portfolio						
	33. Sustain the change process						
6.5.14 Select and Balance	34. Identify programs or projects or ideas that could be included in the portfolio.						
	35. Analyze the characteristics of programs and projects						
	36. Prioritize programs and projects based on the organization's priorities						
	37. Program and project delivery oversight						
	38. Analyze and predict the future performance of a portfolio						
	39. Prepare and facilitate portfolio decisions						
Practice Perspective Score (39 – 234)							