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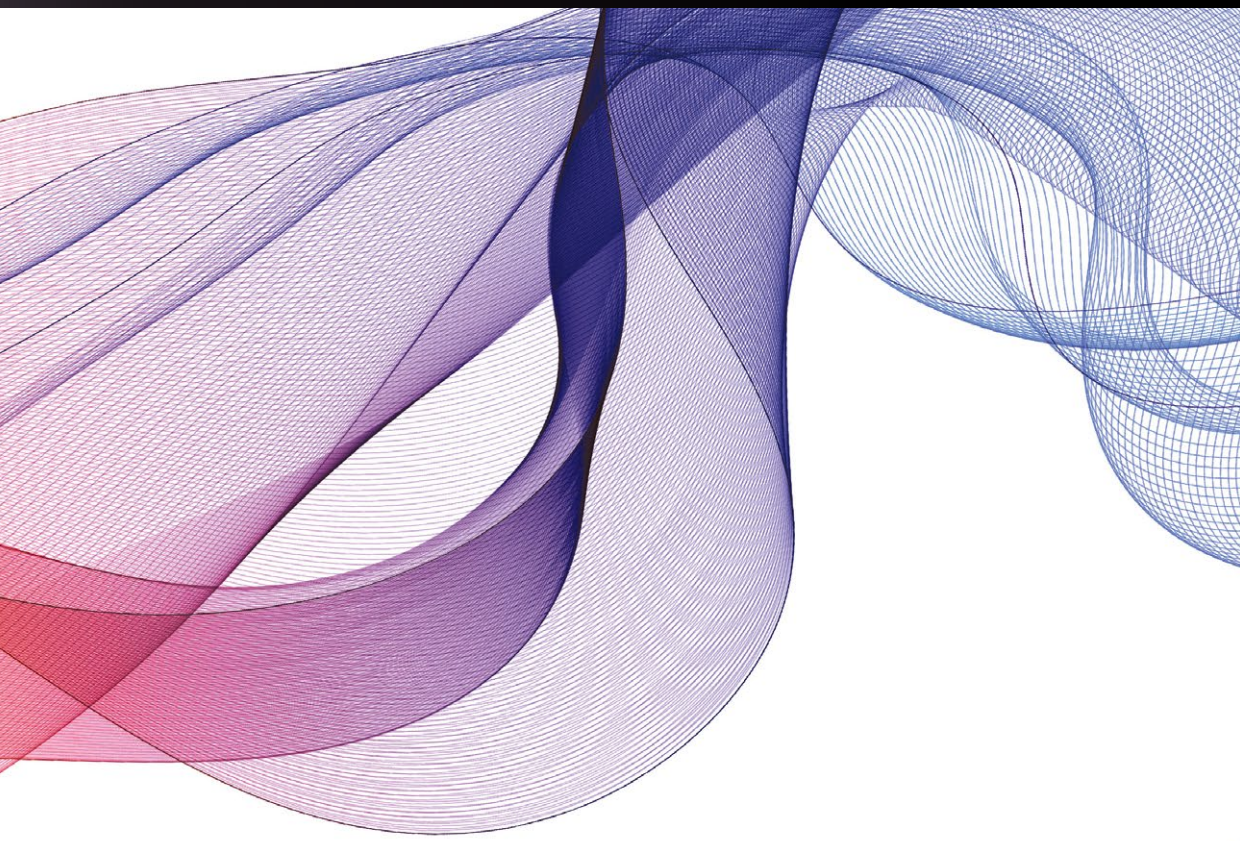

IPMA International Certification Regulations (Public)

for the Assessment of Individuals in Project, Programme & Portfolio Management

IPMA Four Level Certification System

IPMA® international project management association

IPMA International Certification Regulations (Public)

for the Assessment of Individuals
in Project, Programme & Portfolio Management

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Introduction

This document has been developed with the objective of summarising the key features within the International Project Management Association International Certification Regulations (IPMA ICR) Version 4.3 approved by the IPMA Council of Delegates during December 1st 2024. It is known as IPMA ICR Version 4.3 (Public).

The intended targeted audiences of this document include:

- IPMA certification applicants and candidates; and
- external bodies and organizations attracted by the IPMA certification process

The IPMA Four Level Certification (IPMA 4-L-C) System for project management personnel is managed by IPMA through the IPMA Certification and Validation Management Board (CVMB).

The 4-L-C System and the IPMA ICR 4.3 that supports the certification system is applied within each participating nation by the corresponding IPMA Certification Body (CB) and are based on ISO/IEC 17024:2012 (Conformity Assessment – General requirements for bodies operating certification of persons).

The CB certification scheme:

- defines the frame of reference for competences to be assessed using the IPMA Individual Competence Baseline (IPMA ICB); and
- conforms to a common IPMA regulatory framework of the IPMA International Certification Regulations (IPMA ICR).

CBs are validated every three years by IPMA under the terms of their IPMA agreement as a means of checking compliance with the IPMA ICR and to exchange good practice where possible.

The IPMA 4-L-C System operates with three domains: project, programme and portfolio management and four levels of competence:

- IPMA Level A
- IPMA Level B
- IPMA Level C
- IPMA Level D

Within each domain several roles can be certified. Applicant eligibility criteria and areas of responsibility expected for project, programme and portfolio management are identified within each of the roles. The roles and job titles may differ in different industries and organizations, e.g. Project Planner, PMO Officer, Project Sponsor, Commercial Project Manager, etc. The IPMA certification system allows Candidates to demonstrate their competence in the specific role or job position related to the project management profession. The level of competence in which Candidates shall provide evidence within the overall certification process includes several steps.

Applicant eligibility criteria and areas of responsibility expected for project, programme and portfolio management are identified for each role.

There are several steps in the certification process in which the candidate needs to provide evidence of competence.

The level of competence of a candidate is evaluated by assessors who are trained in the IPMA certification assessment process. The IPMA certification assessment process is a framework of structured evaluation that is fair, valid and reliable based on candidate evidence.

Re-certification is required after a five-year period for all IPMA levels, domains and roles and is based on evidence of continuing involvement in project, programme or portfolio management at the appropriate level and evidence of continuing professional development.

Certification for individuals using the IPMA 4-L-C System is a means of providing assurance that the certified person meets the requirements of competence. Confidence in the respective certification schemes for individuals is achieved by means of a globally accepted process of assessment and periodic reassessments of the competence of people who are certified.

One of the characteristic functions of a CB is to ensure that IPMA assessments are conducted in an appropriate manner using defined competence criteria for evaluation.

The complete IPMA Certification Regulations serve as the basis for the recognition within IPMA of each CB and their certification schemes in order to facilitate acceptance of their results at the national and international levels.

Through the CBs' implementation of the IPMA 4-L-C System, IPMA helps to establish an environment for mutual recognition and a platform for the global exchange of professionals in project, programme and portfolio management.

The IPMA ICR specify requirements that ensure that each of the CBs operating the IPMA 4- L-C System operate in a consistent, comparable and reliable manner such that a candidate that is certified by one CB would, under the same circumstances, be certified by any other.

The requirements in the IPMA ICR are specific and audited under the IPMA validation process.

Chapter 1

1.1 The mission and purpose of the Certification Body

1.1.1 The mission and purpose of each IPMA Certification Body (CB) is to implement and maintain the IPMA 4-L-C System in a country or region. The ongoing maintenance, development and dissolution (if necessary) is undertaken in accordance with IPMA policies, procedures, structures and practices.

1.1.2 As part of its responsibilities, each CB documents its practices in the certification of individuals and ensures that the practices it employs do not negatively impact on the impartiality of its certification activities. Each CB establishes, maintains and complies with up-to-date written procedures and is responsible for addressing any concerns in the development, delivery and award of certification. Furthermore, each CB ensures that investigations are carried out rigorously and effectively by persons of appropriate competence who have no personal interest in the outcome.

1.1.3 Each CB acts impartially in relation to its applicants, candidates and certified individuals ensuring its personnel declare any perceived or actual conflicts of interest.

1.1.4 Each CB does not impose restrictions or undue processes that dissuade applicants or candidates from certification and ensure that certification is made openly available to all. In particular, each CB does not restrict certification to those that are only members of its IPMA Member Association (MA).

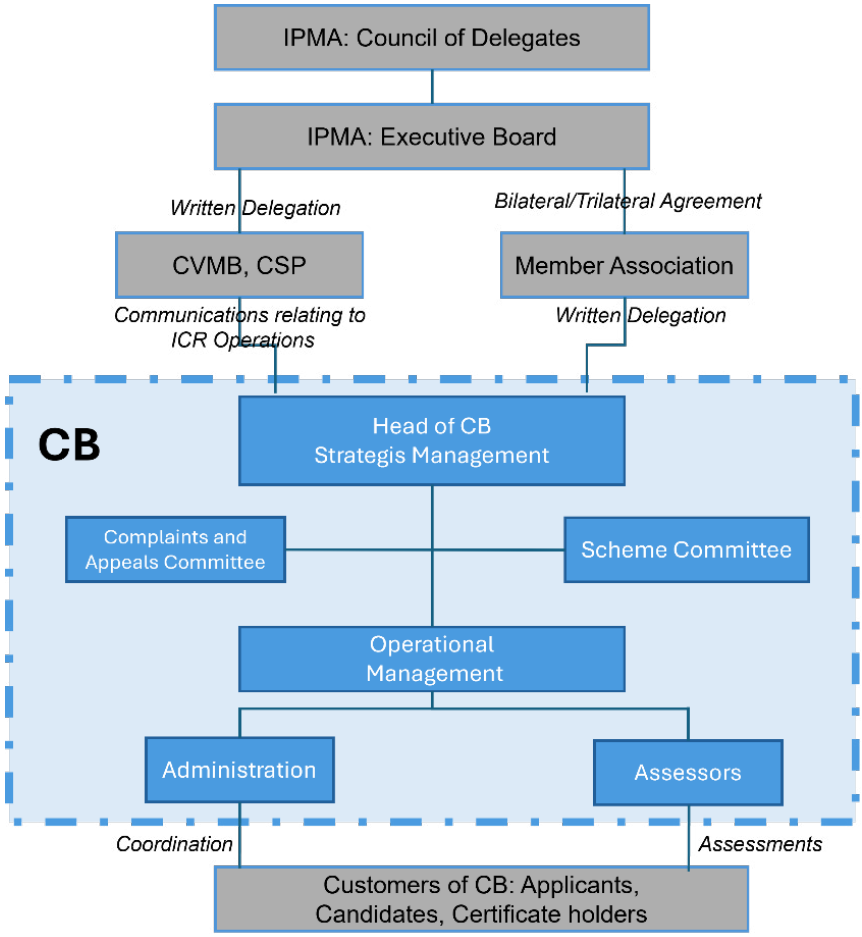


Figure 1-1: Certification Body (CB) organization

1.1.5 The CB organization, shown above, establishes, documents, implements and maintains a management system that is capable of supporting and complying with the requirements of the complete IPMA Certification Regulations. The CB in particular safeguards impartiality and ensures conflicts of interest are addressed.

Chapter 2

2.1 IPMA principles of certification

2.1.1 The following principles of certification are used for assessments so that they are:

- fair, using a standard process and treating all candidates equally;
- valid, asking only for evidence which is appropriate for the competence(s) being assessed;
- reliable and consistent, such that each candidate would receive the same assessment outcome if assessed by different assessors, and that each assessor applies the same principles to each candidate they assess;
- based on current and recent evidence at the level being assessed;
- based on sufficient evidence for a robust judgement to be made by an assessor;
- based on authentic evidence, which can be verified as that of the candidate;
- accurate, using different assessment methods throughout the process; and transparent, so that the candidate is aware of all of the process of assessment, associated costs and the basis on which assessors' judgements will be made.

2.1.2 To remain impartial, the IPMA Certification Body (CB) will not influence a candidate's decision to certify by implying that it would be easier, simpler or cheaper if specific coaching, training or education services are used. The CB does not offer education, training or coaching in project, programme, or portfolio management to a candidate and does not require a candidate to complete specific education, training or coaching for certification.

2.1.3 Each CB can demonstrate that confidentiality, information security and impartiality are not compromised throughout the certification process and that confidentiality is strictly maintained except where required by law or where previously authorised by the individual(s) affected.

2.2 IPMA 4-L-C System

2.2.1 The IPMA sets out the international specification for certification as the owner of the scheme.

2.2.2 The international specification identifies:

- the required components of the certification process for each level, domain and role of certification including candidate eligibility criteria;
- which combination of Competence Elements (CEs) from the IPMA Individual Competence Baseline (IPMA ICB) is required to be assessed for each level and domain;
- which assessment methods will be used by each CB for each level and domain;
- the extent and nature of evidence required from candidates to achieve certification; and
- the threshold values for certification to be achieved.

2.2.3 Each CB ensures that, on delivery of every assessment for certification that it makes available, the content of the assessment is:

- fit for purpose;
- appropriate for the method of assessment chosen; and
- consistent with the specification for the certification level and domain applied for.

2.2.4 Each CB ensures that each assessment adheres to IPMA's principles of certification.

2.2.5 Recognising that IPMA certification is global and to ensure consistency of assessment, each CB ensures that its internal and published documentation is available in each language used for certification to assess a candidate so that they are not disadvantaged.

2.2.6 Each CB ensures that it provides equal access to all potential candidates, irrespective of race, colour, religion, gender, sexual orientation, national origin, ethnic group, disability or other personal characteristics for each of the IPMA certification levels and domains which it makes available.

2.2.7 Similarly, the CB may approve reasonable adjustments to an assessment so as to enable a candidate to demonstrate his or her knowledge, skills and abilities by taking into account any special consideration declared and evidenced at the time of application.

2.3 IPMA 4-L-C level definitions

2.3.1 There are four levels in the IPMA 4-L-C System – Levels A, B, C and D. The IPMA level definitions are constructed against the following core criteria:

- Level A is constructed in terms of the leadership of others in very complex projects (programmes or portfolios) throughout the life cycle (where applicable) at a strategic level.
- Level B is constructed in terms of the leadership of others in projects (programmes or portfolios) and includes complexity throughout the life cycle (where applicable).
- Level C is constructed in terms of the management of others in projects of moderate complexity throughout the life cycle through the application of knowledge/theory across all relevant competences.
- Level D is constructed in terms of knowledge across all relevant competences only.

2.3.2 There are three domains in the IPMA 4-L-C System – project, programme and portfolio. In the three domains, projects have four levels (A, B, C and D); programme and portfolio each have two levels (A and B). This creates eight profiles in the IPMA 4-L-C System as shown below:

		Domain		
		Project	**Programme**	**Portfolio**
level	A	Certified Project Director Certified Agile Organizational Leader Certified PMO Director	Certified Programme Director	Certified Portfolio Director
	B	Certified Senior Project Manager Certified Agile Senior Leader Certified Senior PMO Manager	Certified Senior Programme Manager	Certified Senior Portfolio Manager
	C	Certified Project Manager Certified Agile Leader Certified PMO Manager		
	D	Certified Project Management Associate Certified Agile Associate Certified PMO Associate		

Table 1: IPMA 4-L-C System profiles

2.4 IPMA profiles and eligibility criteria

2.4.1 IPMA Level D Certified Project Management Associate

An IPMA certification at Level D requires that the candidate has knowledge in the CEs related to project management. As such, they usually have broad project management knowledge and may work in a project team.

Eligibility criteria: There is no previous experience required and only knowledge CEs related to project management are assessed.

2.4.2 IPMA Level C Certified Project Manager

An IPMA certification at Level C requires that the candidate has acted in a project management role within a moderately complex project environment within an organization.

Eligibility criteria: within the last six years the candidate needs to have a minimum of three years' experience as a project manager within projects of moderate complexity, or a minimum of three years' experience in a responsible project management role assisting the project manager in complex projects. The evidence timescale can be extended by four years to ten years with justification.

2.4.3 IPMA Level B: Certified Senior Project Manager

An IPMA certification at Level B for project management requires that the candidate has acted in a complex project environment within an organization.

Eligibility criteria: within the last eight years the candidate needs to have a minimum of five years' experience as a project manager of which at least three years were in a responsible leadership function managing complex projects. The evidence timescale can be extended by four years to twelve years with justification.

2.4.4 IPMA Level B: Certified Senior Programme Manager

An IPMA certification at Level B for programme management requires that the candidate has acted in a complex programme environment within an organization.

Eligibility criteria: within the last eight years the candidate needs to have a minimum of five years' experience as a programme manager of which at least three years were in a responsible leadership function managing complex programmes. The evidence timescale can be extended by four years to twelve years with justification.

2.4.5 IPMA Level B: Certified Senior Portfolio Manager

An IPMA certification at Level B for portfolio management requires that the candidate has acted in a complex portfolio environment within an organization.

Eligibility criteria: within the last eight years the candidate needs to have a minimum of five years' experience as a portfolio manager of which at least three years were in a responsible leadership function managing complex portfolios. The evidence timescale can be extended by four years to twelve years with justification.

2.4.6 IPMA Level A: Certified Project Director

An IPMA certification at Level A for project management requires that the candidate has acted in a very complex project environment that has a strategic impact on the organization.

Eligibility criteria: within the last 12 years, the candidate needs to have a minimum of five years' experience as a project manager in a responsible leadership function in very complex projects of which at least three years were at a strategic level. The evidence timescale cannot be extended.

2.4.7 IPMA Level A: Certified Programme Director

An IPMA certification at Level A for programme management requires that the candidate has acted in a very complex programme environment that has a strategic impact on the organization.

Eligibility criteria: within the last 12 years, the candidate needs to have a minimum of five years' experience as a programme manager in a responsible leadership function in very complex programmes at a strategic level, or a minimum of four years' experience as a programme manager in a responsible leadership function in very complex programmes and a minimum of three years' experience as a project manager in a responsible leadership function managing very complex projects at a strategic level. The evidence timescale cannot be extended.

2.4.8 IPMA Level A: Certified Portfolio Director

An IPMA certification at Level A for portfolio management requires that the candidate has acted in a very complex portfolio environment that has a strategic impact on the organization.

Eligibility criteria: within the last 12 years, the candidate needs to have a minimum of five years' experience as a portfolio manager in a responsible

leadership function in very complex portfolios at a strategic level or a minimum of four years of experience as a portfolio manager in a responsible leadership function in very complex portfolios and a minimum of three years' experience as a project or programme manager in a responsible leadership function managing very complex projects or programmes at a strategic level. The evidence timescale cannot be extended.

2.4.9 IPMA Level D Certified Agile Associate

This certification requires that the candidate has knowledge in the CEs related to project management and agile project management. As such, they usually have broad project management knowledge and may work in a project team.

Eligibility criteria: There is no previous experience required and only knowledge CEs related to project management and agile project management are assessed.

2.4.10 IPMA Level C Certified Agile Leader

This certification requires that the candidate has acted in an Agile project management role within a moderately complex project environment within an organization.

Eligibility criteria: within the last six years the candidate needs to have a minimum of three years' experience as a project manager within projects of moderate complexity, or a minimum of three years' experience in a responsible project management role assisting the project manager in complex projects. The evidence timescale can be extended by four years to ten years with justification.

2.4.11 IPMA Level B Certified Agile Senior Leader

An IPMA certification at Level B for project management requires that the candidate has acted in a complex agile project environment within an organization.

Eligibility criteria: within the last eight years the candidate needs to have a minimum of five years' experience as a project manager of which at least three years were in a responsible leadership function managing complex projects. The evidence timescale can be extended by four years to twelve years with justification.

2.4.12 IPMA Level A Certified Agile Organizational Leader

An IPMA certification at Level A for Agile project management requires that the candidate has acted in a very complex agile project environment that has a strategic impact on the organization.

Eligibility criteria: within the last 12 years, the candidate needs to have a minimum of five years' experience as an agile project manager in a responsible leadership function in very complex projects of which at least three years were at a strategic level. The evidence timescale cannot be extended.

2.5 Complexity of projects, programmes and portfolios

2.5.1 Project, programme and portfolio complexity is evaluated based on the requirements of eligibility for each certification level, and candidates use suitable examples of evidence for their application to meet the complexity criteria. The evaluation of complexity of each project, programme or portfolio covers:

2.5.2 Capability-based indicators

- Objectives and assessment of results (output-related complexity): this indicator describes the complexity originating from vague, exacting and mutually conflicting goals, objectives, requirements and expectations.
- Processes, methods, tools and techniques (process-related complexity): this indicator describes the complexity related to the number of tasks, assumptions and constraints and their interdependence; the processes and process quality requirements; the team and communication structure; and the availability of supporting methods, tools and techniques.
- Resources including finance (input-related complexity): this indicator describes complexities relating to acquiring and funding the necessary budgets (possibly from several sources); the diversity or lack of availability of resources (both human and other); and the processes and activities needed to manage the financial and resource aspects, including procurement.
- Risk and opportunities (risk-related complexity): this indicator describes complexity related to the risk profile(s) and uncertainty levels of the project, programme or portfolio and dependent initiatives.

2.5.3 Context-based indicators

- Stakeholders and integration (strategy-related complexity): this indicator describes the influence of formal strategy from the sponsoring organization(s), and the standards, regulations, informal strategies and

politics which may influence the project, programme or portfolio. Other factors may include the importance of outcomes for the organization; the measure of agreement between stakeholders; the informal power, interests and resistance surrounding the project, programme or portfolio; and any legal or regulatory requirements.

- Relations with permanent organizations (organization-related complexity): this indicator describes the amount and interrelatedness of the interfaces of the project, programme or portfolio with the organization's systems, structures, reporting and decision-making processes.
- Cultural and social context (socio-cultural complexity): this indicator describes complexity resulting from socio-cultural dynamics. These may include interfaces with participants, stakeholders or organizations from different socio-cultural backgrounds or having to deal with distributed teams.

2.5.4 Management and leadership based complexity indicators

- Leadership, teamwork and decisions (team-related complexity): this indicator describes the management/leadership requirements from within the project, programme or portfolio. This indicator focuses on the complexity originating from the relationship with the team(s) and their maturity and hence the vision, guidance and steering the team requires to deliver.
- Degree of innovation and general conditions (innovation-related complexity): this indicator describes the complexity originating from the degree of technical innovation of the project, programme or portfolio. This indicator may focus on the learning and associated resourcefulness required to innovate and/or work with unfamiliar outcomes, approaches, processes, tools and/or methods.
- Demand for coordination (autonomy-related complexity): this indicator describes the amount of autonomy and responsibility that the project, programme or portfolio manager/leader has been given or has taken/ shown. This indicator focuses on coordinating, communicating, promoting and defending the project, programme or portfolio interests with others.

2.5.5 Complexity is measured against that of similar projects, programmes or portfolios for the level applied for in its profile environment and each complexity indicator is scored. When more than one project, programme or portfolio is provided by the candidate, each is independently assessed by the assessors who only accept competence evidence from projects, programmes or portfolios that meet the minimum complexity requirements for the level at which the candidate has applied.

2.6 IPMA Project Management Officer Certification

Individuals working in a PMO may apply for this role certification:

2.6.1 IPMA Level D Certified PMO Associate

This certification at Level D requires that the candidate has knowledge in the CEs related to project management. As such, they usually have broad project management knowledge and may work in a project team.

Eligibility criteria: There is no previous experience required and only knowledge CEs related to project management are assessed.

2.6.2 IPMA Level C Certified PMO Manager

This certification requires that the candidate has acted in a moderate complex environment. Responsible in a PMO role with a moderate complexity within an organization.

Eligibility criteria: Minimum of 3 years' experience as PMO Manager within a PMO environment of moderate complexity

2.6.3 Certified Senior PMO Manager

This certification requires that the candidate has acted in a complex PMO environment. Responsible in a PMO role in a complex organization and/or responsible for implementing a PMO in a complex environment.

Eligibility criteria: Minimum of 5 years' experience as Senior PMO Manager of which at least 3 years in a PMO leadership role within a complex environment

2.6.03 Certified IPMA Level A PMO Director

All experience for Level A must have been obtained within the last 12 years.

This certification requires that the candidate has acted on a strategic level in a complex PMO environment. Responsible in a PMO role in a very complex organization which has a strategic impact

Eligibility criteria: Minimum of 5 years' experience as PMO Director of which at least 3 years were at a strategic level.

2.7 Complexity for Project Management Officer (PMO) roles.

2.7.1 Output-related complexity

Complexity arises from: vague, demanding and/or conflicting goals, benefits, requirements and/or expectations.

- There are hardly any vague, conflicting and/or changing goals, benefits and/or requirements within the Project, Programme or Portfolio (PPP) initiative.
- The PPP initiative suffers from vague, conflicting and/or changing goals, benefits and/or requirements at departmental or divisional level within its own organization.
- The PPP initiative is seriously affected by vague, conflicting and/or changing goals, benefits and/or requirements. These also come from the highest levels within its own organization.
- The PPP initiative is seriously affected by vague, conflicting and/or changing goals, benefits and/or requirements. These also come from the highest levels of multiple organizations, which have an interest or influence on the initiative.

2.7.02 Process-related complexity

Complexity arises from: the number of tasks, assumptions and constraints and their interdependencies; the processes with the relevant quality requirements; the teams and the communication structure;

- The number of knowledge-intensive working hours is several hundred. The organization's offered techniques and quality systems are adequate for the PPP initiative.
- The number of tasks / work packages runs into tens, knowledge-intensive work hours > 1,000, there are multiple sub-processes
- The number of tasks / work packages runs into the hundreds, 'blue collar' working hours > 30,000 and/or knowledge-intensive working hours > 6,000, multiple locations / sites with different quality requirements.
- The number of tasks / work packages runs into the thousands, 'blue collar' working hours > 100,000 and/or knowledge-intensive working hours > 30,000, multiple locations / sites with different quality requirements.

2.7.3 Input-related complexity

Complexities arise from: acquiring and funding the necessary budgets (possibly from multiple sources); the diversity of or lack of resources (both human and other); and the processes and activities required to manage the financial and resource aspects, including procurement.

- Funding, procurement and purchasing are handled by the standing organization. Availability of suitable team staff is not a major problem.
- Funding is not a concern for the PPP initiative. Existing acquisition and procurement strategies can be routinely applied. Availability of suitable staff poses a challenge.
- Funding is not clear initially and/or needs to be partially secured during the PPP initiative. Existing acquisition and procurement strategies are applicable. Availability of suitable staff often poses a challenge.
- Funding is not clear initially and needs to be secured during and through the PPP initiative. External funding is used (at least partially). Acquisition and procurement strategies are challenging and innovative.

2.7.4 Risk-related complexity

Complexity arises from: the risk profile and uncertainty levels of the PPP initiative and its dependent initiatives.

- The risk profile including Health, Safety, Security, Environment (HSSE) aspects is actively managed within the PPP initiative. The main risks are known at the start of the PPP initiative.
- The risk profile (including HSSE aspects) is actively managed within the PPP initiative and has attention at departmental or divisional level within the organization. Key risks are not all known at the start of the PPP initiative.
- The risk profile (including HSSE aspects) is actively managed within the PPP initiative and has attention at the highest level of the organization and/or is the subject of politics and/or media at local level. The main risks are not all known at the start of the PPP initiative.
- The risk profile (including HSSE aspects) is actively managed within the PPP initiative and has a direct impact on the organization's strategy and/or is the subject of politics and/or media at (inter)national level. The main risks are not well known at the start of the PPP initiative.

2.7.5 Strategy-related complexity

Complexity created by: The influence of the formal strategy of the sponsoring organization(s), norms, regulations, informal strategies and policies that may affect the PPP initiative; The importance of the end result to the organization, the level of agreement among stakeholders; the informal influence, interests and resistance around the project; and any requirements of a legal or regulatory nature.

- The PPP initiative is realised within an existing strategy, where there was no or limited political, informal influence and resistance.
- The PPP initiative is realised within an existing strategy, where the The PPP initiative suffered from politics, informal influence and resistance.

- The PPP initiative concerns the implementation of new strategy, involving a lot of politics, Informal influence and resistance within the organization.
- Through the PPP initiative, new strategy is defined and implemented, with There is a lot of politics, informal influence and resistance at the highest level of several organizations.

2.7.6 Organizational complexity

Complexity arises from: the number and entanglement of interfaces between the PPP initiative with the systems, structures and reporting and decision-making processes of the organization(s).

- The PPP initiative is marginally affected by systems, structures and/or reporting and decision-making processes within the organization.
- The PPP initiative is intensively affected by systems, structures and/or reporting and decision-making processes within the organization.
- The PPP initiative introduces new systems, structures and/or reporting and decision-making processes within the organization.
- The PPP initiative introduces new systems, structures and/or reporting and decision-making processes within multiple organizations, with interfaces between them.

2.7.7 Socio-cultural complexity

Complexities arise from: socio-cultural dynamics. These may include interfaces with participants, stakeholders or organizations from different socio-cultural backgrounds, or having to deal with dispersed teams.

- All participants in the PPP initiative have the same socio-cultural background and/or there is a single location.
- There are some participants from different socio-cultural backgrounds and/or multiple locations.
- There are multiple participants from very different socio-cultural backgrounds and/or multiple locations in multiple countries or time zones.
- There are many participants from very different socio-cultural backgrounds and/or multiple locations in multiple countries and diverse time zones.

2.7.8 Team-related complexity

Complexity created by: the management and leadership requirements within the PPP initiative. This is the complexity created by the interaction of the team(s) and their maturity and the related level of vision, guidance and support from you as PMO that the team(s) need to deliver.

- Within the PPP initiative, there is one team or there are some teams that have to work together. The teams are calculated for their task.
- There are several teams within the PPP initiative that do not always work together internally and among themselves in an equally task-full manner.
- Within the PPP initiative are multiple distributed teams that differ in task maturity and need to work together.
- Within the PPP initiative, there are many distributed and in task maturity different teams within multiple organizations that need to work together.

2.7.9 System-related complexity

Complexity arises from: the amount of information that needs to be processed, the accessibility to the systems in which this information is fixed and the extent to which these systems are linked, and the availability of supporting methods, tools and techniques.

- All information comes from 1 integrated information system. The information needs are unambiguous,
- The information comes from some linked information systems. The information needs are unambiguous. Multiple methods, tools and techniques are used.
- The information comes from some unconnected information systems. Information needs are complex,
- Multiple methods, tools and techniques are used. All information comes from various, unconnected information systems. Information needs are complex and vary by target group. Many methods, tools and techniques are used.

2.7.10 Autonomy-related complexity

Complexity arises from: the degree of autonomy and responsibility given to or taken or shown by the manager of the PPP initiative. This manifests itself in the hierarchical layers to which the PMO reports and the manner in which reporting takes place.

- The PMO officer reports to a client / steering committee. There is limited participation in decision-making and the need to defend the initiative's interests elsewhere.
- The PMO officer reports to a client / steering committee and regularly prepares decision-making. The PMO defends the initiative's interests within the organization.
- The PMO officer reports to a steering level high up in the organization where his influence is reflected in decision-making. The PMO defends the interests of the initiative within the organization(s) concerned.

- The PMO officer reports directly to the highest level, where there is clearly mutual influence. The PMO defends the interests of the initiative at the highest level within the organization(s) concerned.

2.8 IPMA Project Planner Certification

2.8.1 IPMA Certified Project Planner

This certification requires that the candidate has acted in a moderately complex environment. Responsible in planning a project with moderate complexity within an organization.

Eligibility criteria: A minimum of 3 years' experience as a project planner within projects of moderate complexity or a minimum of 3 years' experience in a responsible project planning role assisting the senior project planner in complex projects.

All certification steps and regulations for Project Planners certification are the same as for level C Project Managers.

2.8.2 Certified Senior Project Planner

This certification requires that the candidate has acted in a complex project environment. Responsible for planning a complex project within an organization.

Eligibility criteria: A minimum of 5 years' experience as a project planner of which at least 3 years were

- in a responsible leadership function managing the planning of complex projects
- Or in a responsible leadership function managing the planning of a Work Package of very complex and strategic projects

A senior project planner is expected to have worked:

- with three to five planners from different units and cultures,
- with a project plan that integrates more than five schedules,
- with frequent customer relationships,
- with frequent suppliers / contractors relationships and interventions.

All experience for Senior Project Planner level must have been obtained within the last 8 years. The evidence timescale can be extended by 4 years with justification.

2.8.3 IPMA Certified Strategic Project planner

This certification requires that the candidate has acted on a strategic level within a very complex project environment. Responsible for planning a very complex project which has a strategic impact on the organization.

Eligibility criteria: A minimum of 5 years' experience as a Strategic Project Planner in a responsible leadership function within very complex projects of which at least 3 years were at a strategic level.

A strategic project planner is expected to have worked:

- with more than five planners from different units and cultures,
- with a project plan that integrates more than five schedules,
- with complex and frequent customer relationships and difficult interfaces with customer planning
- with complex and frequent suppliers / contractors relationships, leading to interventions and audits.

All experience for Strategic Project Planner must have been obtained within the last 12 years.

2.9. Competence baseline for assessment

2.9.1 The frame of reference during the assessment process is the IPMA ICB, Reference Guide ICB4 In an Agile World, ICB Reference Guide for PMO and Project Planning Competence reference guide and its component CEs. It is the IPMA standard for certification and is used for the assessment of candidates by each CB.

2.9.2 The IPMA ICB, and reference guides have a number of CEs, each of which has a number of Key Competence Indicators (KCIs). The assessment of a candidate is undertaken at the CE level using the KCIs to support the assessment.

2.9.3 The IPMA ICB definition of individual competence is the 'application of knowledge, skills and abilities in order to achieve the desired results in a work environment':

- The assessment of a D-level candidate is based on knowledge where candidates can demonstrate understanding of the relevant CE in a non-complex project environment;
- The assessment of a C-level candidate is based on the demonstration of the CE applied in a project environment of moderate complexity;
- The assessment of a B-level candidate is based on the demonstration of the CE applied in a complex project, programme or portfolio environment.

- The assessment of an A-level candidate is based on the demonstration of the CE applied in a very complex project, programme or portfolio environment.

2.9.4 Exam questions, interview questions and simulation case studies used for levels A, B and C (where appropriate) are formulated such that they allow candidates to demonstrate the application of knowledge, skills and abilities across the various assessment methods used.

2.9.5 To achieve Level A, candidates must demonstrate sufficient evidence of 80% of the domain CEs defined in the IPMA ICB, in a very complex environment.

2.9.6 To achieve Level B, candidates must demonstrate sufficient evidence of 80% of the domain CEs defined in the IPMA ICB, in a complex environment.

2.9.7 To achieve Level C, candidates must demonstrate sufficient evidence of 80% of the domain CEs defined in the IPMA ICB, in a moderately complex environment.

2.9.8 To demonstrate sufficient evidence against a specific CE, candidates need to demonstrate a minimum of 50% of the KCIs.

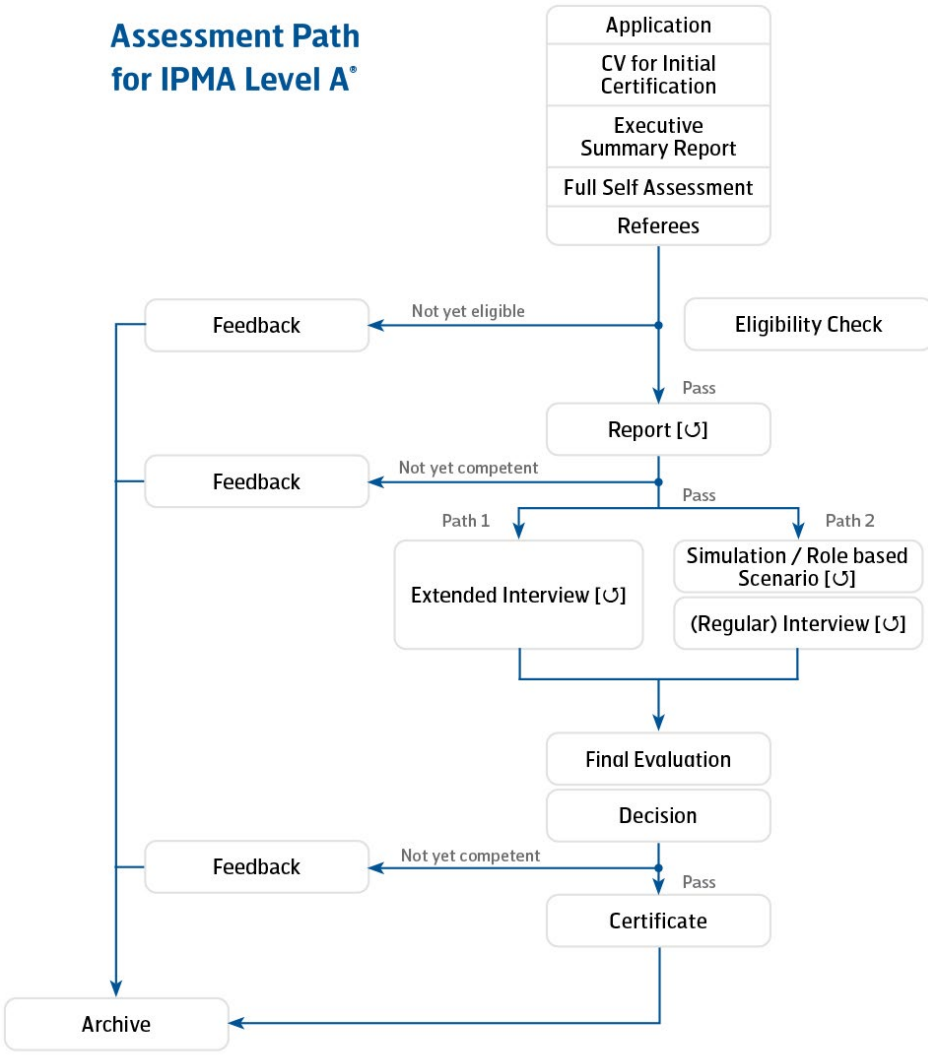
2.9.9 To achieve Level D candidates must demonstrate knowledge of 80% of the domain CEs defined in the IPMA ICB.

Chapter 3

3.1 Initial certification

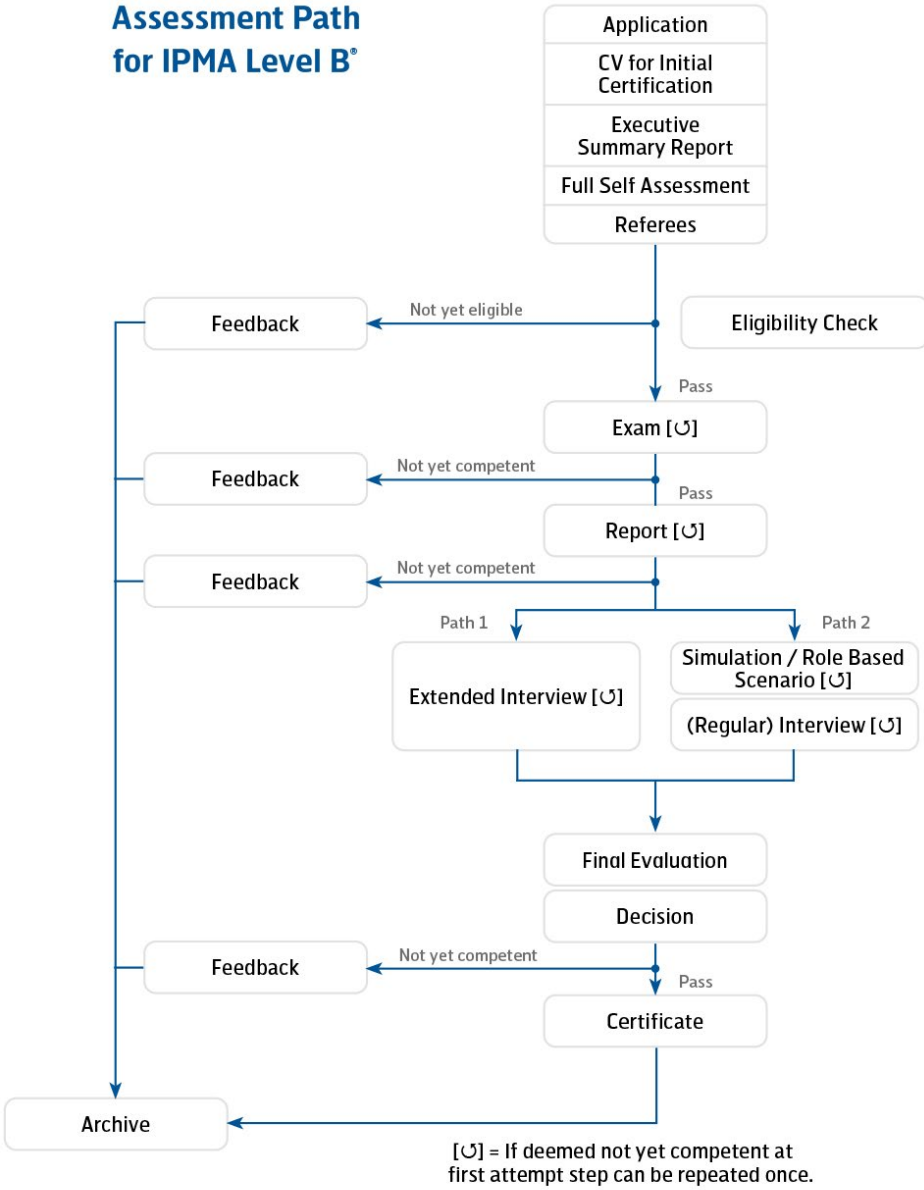
3.1.1 There are several equivalent, predefined IPMA paths for certification that are applied to the certification of individuals. Each IPMA Certification Body (CB) selects from these paths against each of the levels of certification and domains. Some CBs may have additional requirements or certification steps that have been approved by the IPMA Certification and Validation Management Board (CVMB).

Assessment Path for IPMA Level A®

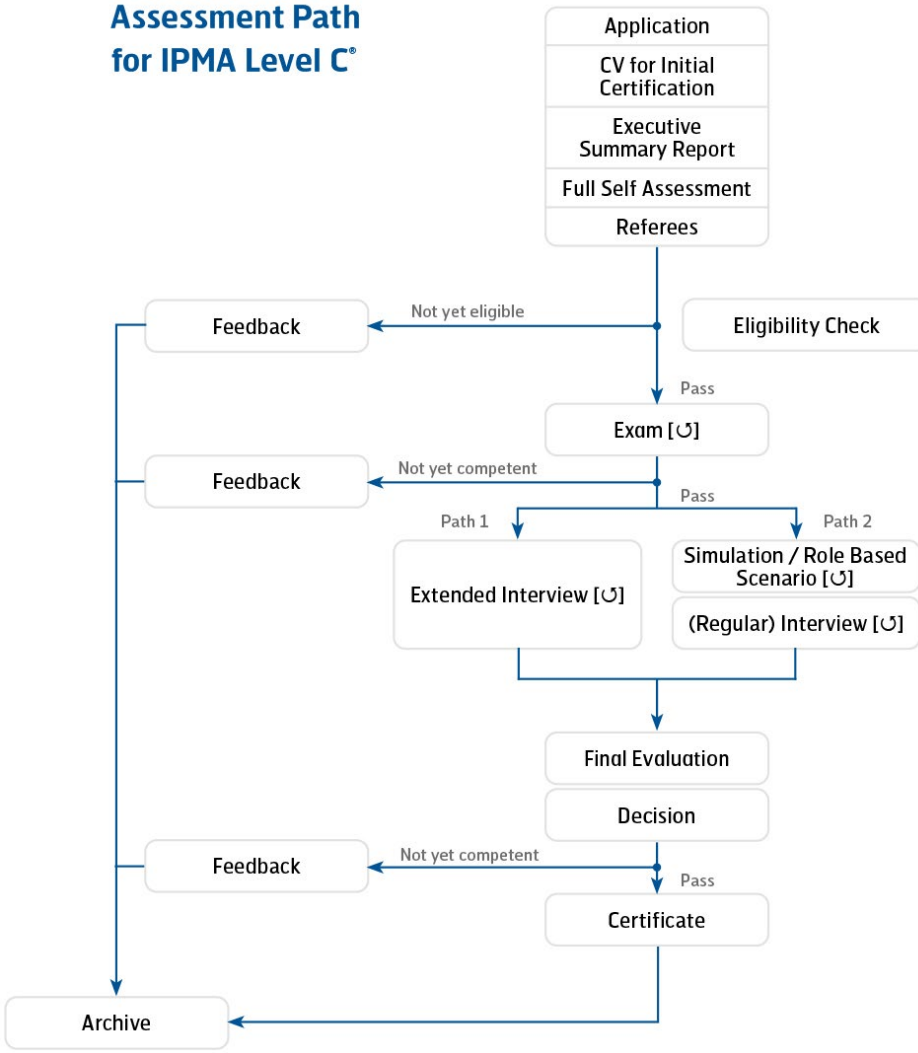


[↺] = If deemed not yet competent at first attempt step can be repeated once.

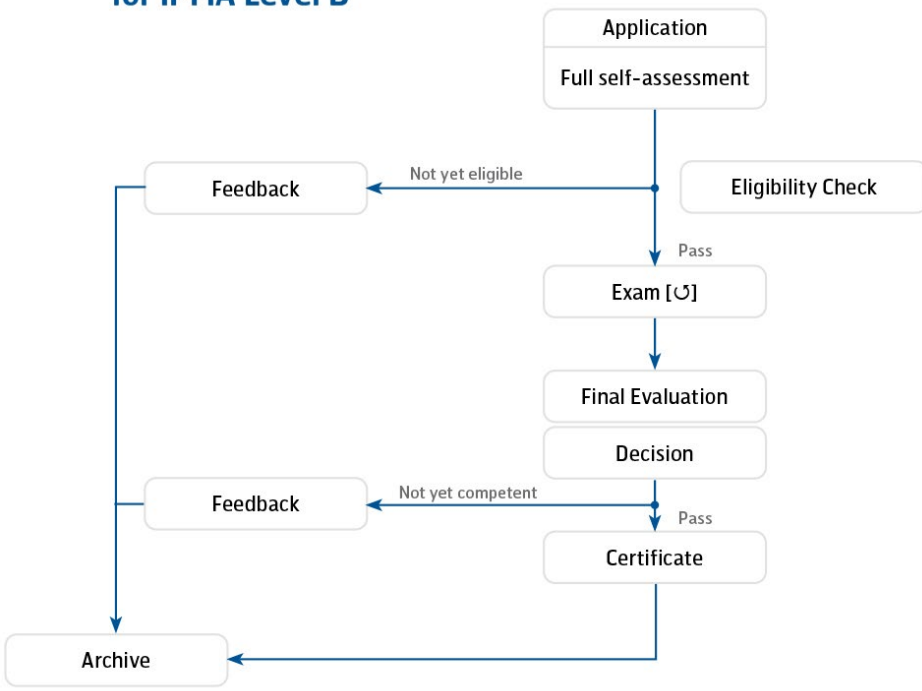
Assessment Path for IPMA Level B®



Assessment Path for IPMA Level C®



Assessment Path for IPMA Level D®



[↺] = If deemed not yet competent at first attempt step can be repeated once.

3.1.2 Candidates are permitted to retake specified steps (0) of the assessment once if they are unsuccessful on their first attempt. For a candidate to be awarded an IPMA certificate, they must have successfully completed each of the assessment steps within 18 months from the date of acceptance of their application.

3.2 Key certification steps Application

3.2.1 Each CB provides an application form that includes all necessary personal details for the CB to identify and process the applicant for suitability against the corresponding certification level and domain applied for. As part of this, the applicant confirms that they agree to and will comply with the conditions and obligations of the IPMA Certification process including, but not limited to:

- the publication of their name and certificate details on the CB and IPMA websites, unless they express a wish not to do so in writing;
- the release of their details to IPMA for audit purposes;
- ownership and use of the certificate;
- the CB's certification procedures;
- the CB's financial terms and conditions;
- the CB's code of professional conduct and code of ethics; and
- the CB's appeals process.

Self-assessment

3.2.2 The applicant's self-assessment is used by the CB in the application phase to assess their suitability for the qualification. It may also be used after the assessment has been completed in order to provide comparative feedback to the candidate.

3.2.3 For levels A, B and C, the applicant completes a full self-assessment (knowledge, skills and abilities) for all CEs in the level and domain applied for while considering the KCIs in their assessment.

3.2.4 For Level D, the applicant completes a self-assessment for knowledge for all CEs.

Curriculum Vitae (CV)

3.2.5 For levels A, B and C, the applicant provides a summary of any projects, programmes or portfolios they have managed or been involved in to meet the IPMA criteria. Sufficient detail needs to be provided by the applicant

to enable the assessors to assess suitability of the IPMA level for which the applicant is applying. This, as a minimum, includes:

- the name and contact details of the applicant;
- a career history including relevant:
  a. project, programme and portfolio roles and positions held;
  b. degrees and coursework from accredited institutions of higher learning;
  c. professional certifications and qualifications;
  d. project, programme and portfolio management training;
  e. professional memberships; and
  f. other professional development including awards, achievements or publications in project, programme or portfolio management.
- An overview of projects, programmes and portfolios which include:
  a. key deliverables, duration, budget and complexity of the projects, programmes or portfolios; and
  b. role, responsibility and extent of engagement of the applicant in each of the projects, programmes or portfolios.

3.2.6 For re-certification at all levels, the certificate holder must provide a CV as above plus sufficient evidence that they have undertaken a minimum of 35 hours' of Continuing Professional Development (CPD) per annum since their last certification. The CPD record is signed by the applicant and includes:

- name of development activity;
- description of the activity;
- dates undertaken and hours claimed;
- CEs covered by the activity; and
- a summary statement reflecting on their learning from the CPD gained over the period and how they benefited.

Executive Summary Report

3.2.7 The Executive Summary Report can be used by assessors in preparation for the interview. For levels A, B and C, the applicant submits an Executive Summary Report of a maximum of 15 pages regarding their suitability for assessment based on the eligibility criteria. The report includes:

- organization (company details, industry and project types, principal objectives of the organization and business unit in which the applicant works);
- a one-page summary for each of the project(s)/programme(s)/ portfolio(s) with related time schedules and phases and resources available to them;
- the role of the applicant (an organization chart with their position identified, their area of responsibility, an overview of the project

management procedures they use, their relationship with internal and external stakeholders).

3.2.8 In addition:

- for levels A and B: a description of how they have led each project, programme or portfolio and how they meet the complexity criteria for the level being applied for, noting that these details will need to be used by the candidate as the basis for the report; and
- for Level C: a description of how they have managed each project and how they meet the complexity criteria.

Referees

3.2.9 For levels A, B and C and re-certification, the applicant needs to provide names and contact details of at least two referees to verify the applicant's eligibility in relation to the level and domain of certification for which they are applying.

Eligibility check

3.2.10 As part of the 4-L-C System, each CB evaluates the applicant's eligibility so that a decision on suitability can be taken. Based on the evidence provided and drawing on the experience of assessors as necessary, the CB documents and informs the applicant of its decision to accept or reject the application for certification. If the applicant is accepted as meeting the eligibility criteria, they become a candidate.

3.2.11 Where an applicant does not meet the eligibility criteria, they will be advised by the CB if it is possible to re-apply for certification at a lower level or what additional evidence would be required to meet the eligibility criteria.

Exams

3.2.12 For levels B, C and D, each CB ensures that all exams are conducted in a controlled environment that is appropriately supervised with documented procedures that ensure the exam, its papers, questions and any exam-related material is securely controlled. This includes the checking of candidate identities.

3.2.13 The Level B exam may be oral or written and may be decided by a CB for each certification cycle. The types of questions are open answer questions that allow candidates to demonstrate application of knowledge at the required level only. A written exam lasts for three hours. An oral exam lasts for ninety minutes.

3.2.14 The Level C exam is a written paper with open answer questions only. The questions asked allow candidates to demonstrate application of knowledge at the required level only. The Level C exam lasts for three hours.

3.2.15 The Level D exam is a written paper and is a mix of multiple choice and open answer questions. Multiple choice questions have a minimum of four options to select from with one right answer. There is no deduction for wrong answers and unanswered questions are treated as wrong answers. The Level D exam lasts for three hours.

Exams for level C and D, can be taken online or in person.

3.2.16 A recommendation is made by the assessors on pass or not yet competent after any exam. If the candidate fails to achieve the pass mark by a margin of 5% or less, the paper is re-marked independently by another assessor where marks are compared and a final decision made.

Report

3.2.17 Candidates being assessed for levels A and B submit a detailed report covering their project(s), programme(s) or portfolio(s). These are related to the same ones described in the candidate's executive summary report in their application. The report describes the application of their leadership of others in applying the Competence Elements (CEs) for the appropriate role and level being assessed. There is a maximum of 25 pages for the text with an additional maximum of 15 pages for the appendices. The report is submitted in a suitable typeface with a font size of 11 points.

3.2.18 The level A and B report provide the following information:

- Background: the candidate provides a detailed description of the project, programme or portfolio role in context, key stakeholders, scope and key objectives, project, programme or portfolio organization and the associated resources for which the candidate was responsible (maximum three pages including graphics).
- Project, programme or portfolio management challenges: The candidate provides an overview of management challenges throughout the period of the project, programme or portfolio role related to the CEs for the level and domain being applied for. As part of this, the report needs to address the candidate's experiences in:
  a. their management and leadership challenges with respect to others;
  b. how these were acted upon and the results achieved; and
  c. a reflection on the results and lessons learned.

Report evaluation

3.2.19 The CB assigns assessor(s) to evaluate the report against the requirements of the level and domain using the evidence provided by the candidate. A recommendation on pass/not yet competent is given and recorded in the candidate's file with the assessor(s)' notes. The candidate is judged as not yet competent if the report does not meet the requirements of the certification system for the level and role for which they applied.

Path-based simulations and interviews

3.2.20 After the report submission for level's A and B, there are two possible paths that the candidate may take (dependent on availability within the CB) – either a simulation/role- based scenario and interview or an extended interview.

3.2.21 A simulation is a session where the candidate is presented with a situation and asked to undertake tasks corresponding to the relevant role (project, programme or portfolio) and level (A, B or C) while being observed by the assessors. The primary use of simulations is to assess personal competences in an environment where interaction occurs with others. An assessor may choose specific tasks for each candidate, to cover areas where they have given insufficient evidence earlier in the process and based on previously assessed evidence as necessary. The assessment of the candidate is made on an individual basis and is not based on the performance of the group. Assessors have a minimum of thirty minutes observation/contact time per candidate.

3.2.22 The purpose of the interviews is to assess practice and perspective competences. Interviews are undertaken by two assessors, who identify which specific CEs and KCIs are to be assessed for each candidate and ask questions they have previously prepared related to materials provided. Answers are recorded as part of the evidence capture.

Assessors' interview time per candidate	**Level A**	**Level B**	**Level C**
Duration	90 mins	90 mins	60 mins

Table 2: Regular interview durations

3.2.23 Where a simulation is not available, an extended interview is undertaken. To ensure equality, contact time is extended in order to provide opportunity to cover the specific CEs and KCIs that are to be assessed for each candidate.

Assessors interview time per candidate	**Level A**	**Level B**	**Level C**
Duration	120 mins	120 mins	90 mins

Table 3:. Extended interview durations

Final evaluation, decision and certification

3.2.24 During the final evaluation, the assessor(s) determine if the candidate has satisfactorily met all required criteria for the IPMA level and domain being applied for. The lead assessor then forwards the final evaluation to the CB for ratification and final decision. The CB makes the decision as to whether the candidate has passed or is not yet competent based upon the recommendation of the assessors after checking that all procedures have been followed and the documentation is complete.

3.2.25 Certificate information is published on the IPMA website as public information, unless the candidate objects in writing to the CB.
Certificates are valid for five years after which the certificate holder may apply for re-certification at the same level or certification at a new level with appropriate evidence.

Feedback

3.2.26 In cases where an applicant is not accepted as a candidate, or a candidate fails the initial certification process, they are informed in writing about the reasons for the decision by the CB. As part of the continuous improvement process, applicants and candidates may also be asked to complete a feedback questionnaire about their experiences concerning the certification process. This feedback is not used as part of the candidate assessment or decision-making process.

Archiving

3.2.27 The CB ensures that all records are properly controlled and archived for a minimum of six years.

Chapter 4

4.1 Re-certification

4.1.1 Re-certification is due five years after initial certification for all levels, domains and roles. It is the responsibility of the certificate holder to initiate the re-certification process through application up to a maximum of six months from their certificate expiry date. An extension may be provided by the IPMA Certification Body (CB) up to 12 months from the certificate expiry date, with justification.

4.1.2 The requirements for the different levels on re-certification are described in the table below:

<table>
<tr><th></th><th>Level A</th><th>Level B</th><th>Level C</th><th>Level D</th></tr>
<tr><td rowspan="4">Domain-related experience required by the applicant</td><td colspan="3">Evidence of minimum 30 months of practical experience over five-year period</td><td>Not applicable</td></tr>
<tr><td colspan="3">Complexity</td><td>Not applicable</td></tr>
<tr><td colspan="2">Leadership of others</td><td>Management of others</td><td>Not applicable</td></tr>
<tr><td colspan="4">Minimum of 35 hours' evidence of CPD per annum (175 hours total) since the last (re-)certification</td></tr>
</table>

Table 4: Re-certification criteria for levels A, B, C and D

4.1.3 Having evaluated the applicant's documentation for suitability, the CB may consider it necessary undertake an interview in order to follow up on the evidence provided and may ask the applicant to present additional evidence at that interview. A pass or not competent decision for the level and domain applied for is made against this additional evidence in the final evaluation.

Re-certification interview

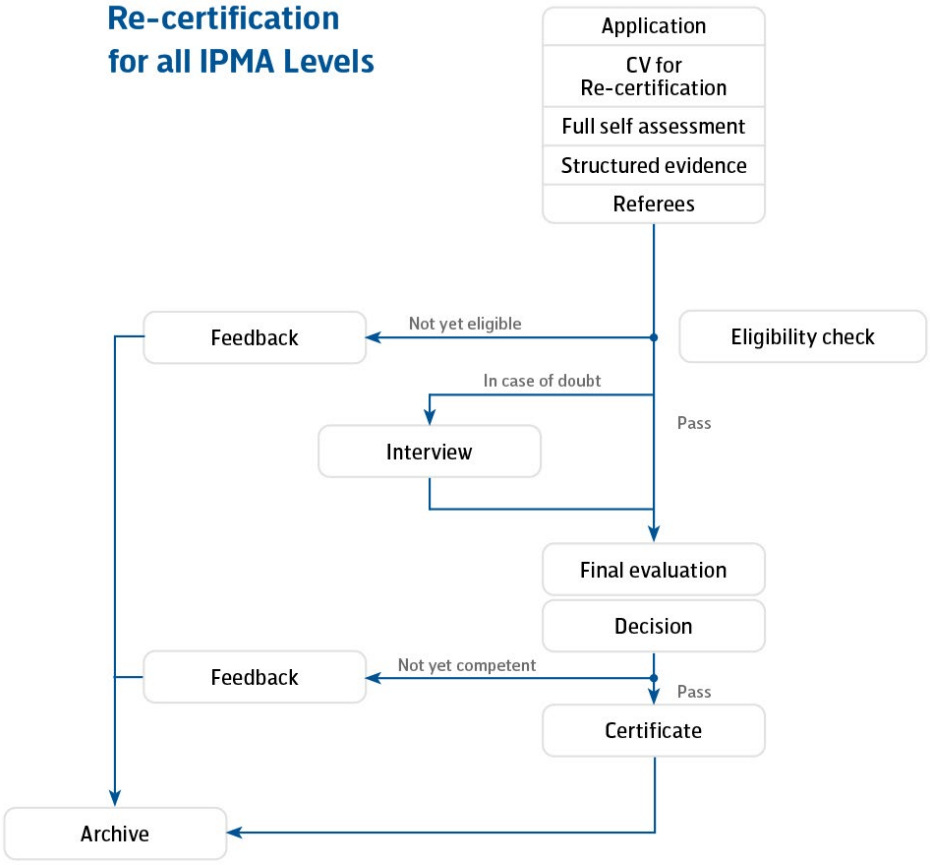
4.1.4 This applies where a re-certification interview is required in case of doubt. To contextualise the applicant's claim of competence and professional

development, the applicant needs to prepare and deliver a 10-minute maximum presentation at the beginning of the re-certification interview. A re-certification interview lasts no more than one hour in total.

4.2 Re-certification Expiry Dates

4.2.1 The new certificate will have a validity period of 5 years starting from the day following expiry of the initial certificate (or of the previous re-certificate) until the fifth anniversary of the previous certificate.

4.2.2 The expiry date of a re-certificate relates to the previous certificate expiry date. It is not related to any of the dates when the re-certification was applied for, assessed, approved or issued.



Chapter 5

5.1 Complaints and appeals

5.1.1 Each IPMA Certification Body (CB) publishes its process to deal with complaints and appeals in a fair, impartial, confidential and constructive manner.

5.1.2 The process ensures that all complaints and appeals are handled and processed within a three-month period from the date of receiving a complaint or appeal in writing. Applicants and candidates may file an appeal in writing with the CB within 30 days from their certification decision. If the individual wishes to make a complaint about the CB, it should be sent to IPMA through the IPMA website for the attention of the IPMA Certification and Validation Management Board.

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