Info folder for the certification as Senior Portfolio Manager pma/IPMA® Level B

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Relevant certification documents:

- Info folder Senior Portfolio Manager pma/IPMA® Level B
- Application documents (Application form Senior Portfolio Manager pma/IPMA® Level B, Self- assessment Senior Portfolio Manager pma/IPMA® Level B, Complexity Sheet Senior Portfolio Manager pma/IPMA® Level B, Executive Summary Report Senior Portfolio Manager pma/IPMA® Level B)
- The ICB für Portfolio Management Version 4.0
- The latest version of the pm baseline

The first step is to register on the pma website with your personal password. Subsequently an online application via the “Self Service Tool” (log in on the pma website).

The documents can be downloaded free of charge from the pma website or can be provided by the certification body via e-mail. If you have any questions, please contact: zertifizierung@pma.at.

1 General information

1.1 Overview of the certification process

The certification process is segmented into the following steps:

- registration on pma website
- contact the pma Certification Body by e-mail regarding requirements and application documents
- online application
- Admission
- (online) certification briefing
- Report
- Certification day
- Overall assessment
- After successful certification the candidate receives a certificate with a validity of 5 years

1.2 Requirements for the certification

For this certification the ICB for Portfolio Management Version 4.0, the methods & processes of the latest pm baseline (PM,PgM); methods and processess of Portfolio Management and further literature in accordacne with the pma literature list are relevant.

Knowledge:

- Detailed konwledge according to the ICB for Portfolio Management Version 4.0
- Methods & processess of Portfolio Management

Experience: (= min. 5 years of experience in Portfolio Management in the last 8 year)

- at least 900 person days (PD) experience as Portfolio Manager (1 year = 180 PD), including
- at least 540 person days (PD) leadership of other people throughout the Portfolio-life cycle acting as a sloely responsiblle Portfolio Manager of complex Portfolios[1]

Participation in a (online) certification briefing: briefing dates can be found on the pma website under events.

[1] Evaluation ot the complexity via the Complexity Sheet at application

1.3 Overview of the certification as a Senior Portfolio Manager

Processing time: approx. 4 months

Registration on pma website, online application via the "Self Service Tool" (log in on the pma website) incl. uploading of following documents:
Application form, Self-assessment, Complexity Sheet and Executive Summary Report
(**at least 4 months** previous to the certification date)

If required: feedback from the assessor regarding the application documents via the Self Servie Tool.
If necessary, modifiaction of the application documents by the candiate via the Self Service Tool
(**at least 3 months** previous to the certifiation date)

Admission to the certification

Invoicing
(the invoice will be sent by port or e-mail approx. 2 months previous tot he certification date)

Payment

If requrired: PM qualification by further training (self-assessment by the candidate)

Binding participation in a (online) certification briefing

Events

Preparation of the report

Submission of the report via the Self Service (log in on the pma website)
(**at least 3 weeks** previous to the certification date)

Feedback on the report from the assessor via the Self Service Tool
Communication of the time schedule for certification day via e-mail
(**at least 1 week** previous tot he certifcation date)

Individual preparation for the PM-certification

Certification day:
Certification on site: workshop, oral exam and interview

respectively

online-certification: short role play (negotiation sequence), oral examand interview.

oral feedback (no additional written feedback will be given)

if certification is not successful, you will receive **within 2 weeks** after the certification day an e-mail with the result and further options

If certification is successful – the certificate is available for download in the pma "Self Service Tool" under "Certifications" / "Certificates." If you select the "printed certificate by mail" option (for an additional fee), delivery takes approximately 2 weeks from the date of certification. The certificate is valid for 5 years.

If the **minimum number of 4 candidates** is not reached - even at short notice before the certification date - due to cancellations by participants, the certification cannot take place on site and will be switched to an online certification.
In this case, you will be credited with the difference in the certification fee.

2 Application process

The **application process** consists of:

- Registration on the pma website
- Complete the online application via the "Self Service Tool (log in on the pma website) – points marked in **bold** are explained below:
    - **Certification date**
    - Core Data
    - Invoice
    - Certificate
    - Brief description of the company or area of business
    - References
    - **Document Upload – incl. uploading the following application documents****:**
        - **Application form** Senior Portfolio Manager pma/IPMA® B
        - **Self-assessment** Senior Portfolio Manager pma/IPMA® B
        - **Complexity Sheets** Senior Portfolio Manager pma/IPMA® B (for each Portfolio indicated)
        - **Executive Summary Report** Senior Portfolio Manager pma/IPMA® B
    - **Confirm and send Application**
- Review of the submitted application by the pma **Certification Body**
- Admission to the certification by the pma **Certification Body**

****all application docuemtns can be obtained directly from the pma Certification Body – please contact them in advance by e-mail.

2.1 Registration on the pma website

If you have no existing account with pma, please register at the **website**

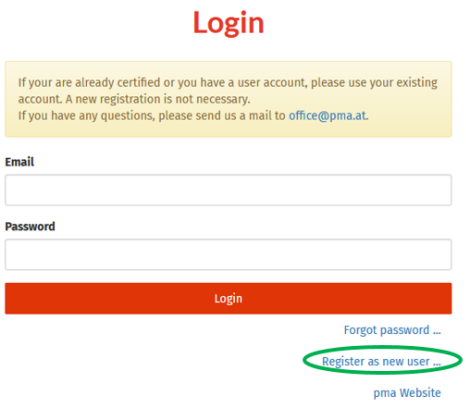


Figure 1: Registration as new user

After successul registration, please check your e-mail inbox and confirm the link, wich you will receive via e-mail from pma.

2.2 Selection of the certificate date

Select 'Certifications' in the menu selection field of the pma Self Service Tool and then click on the "+ Apply for a certification date" button

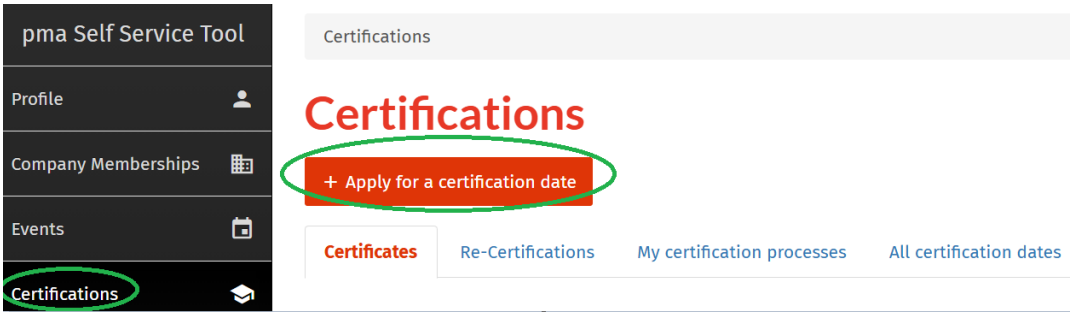
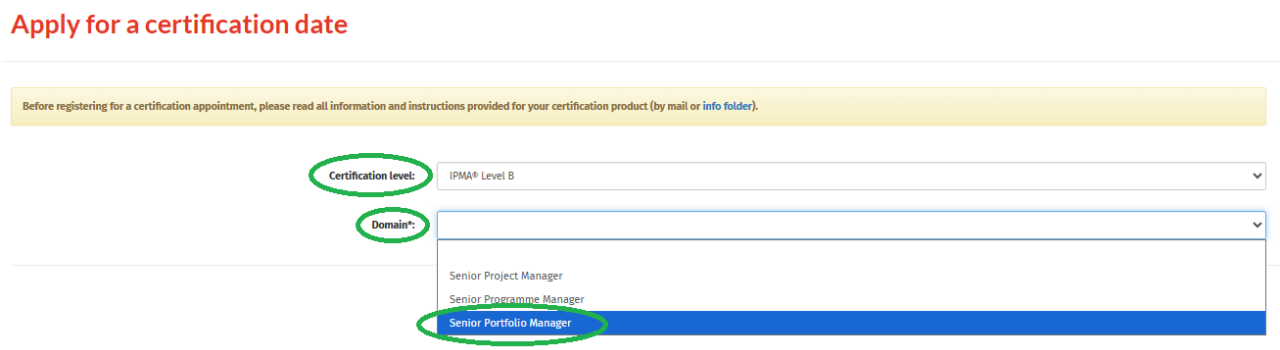


Figure 2: application to a certification date

First, please select the **"certification level" "IPMA® Level B"** and then the **domain "Senior Portfolio Manager"**. Then please make the decision regarding the **"Type of certification date" - "Open date"** (still available) dates are displayed in the form of the following drop-down menu Certification date



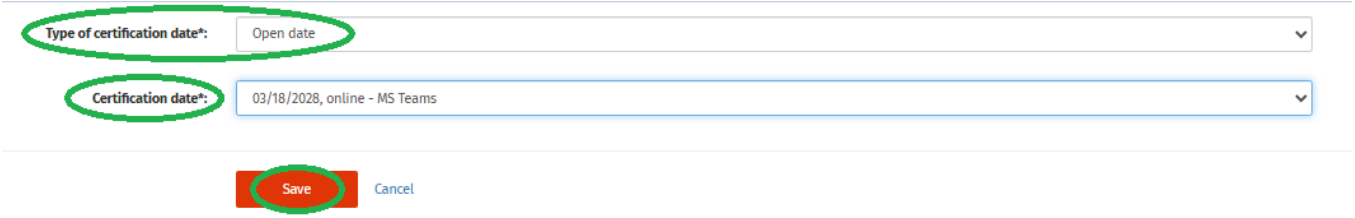


Figure 3: option 1 –application to an open date

Closed dates for companies are not displayed automatically. To do this, select the option "**Closed date" under "Type of certification date"**. You will then be asked to enter the desired certification date manually. Then enter your company/organisation under **"Organisation"**

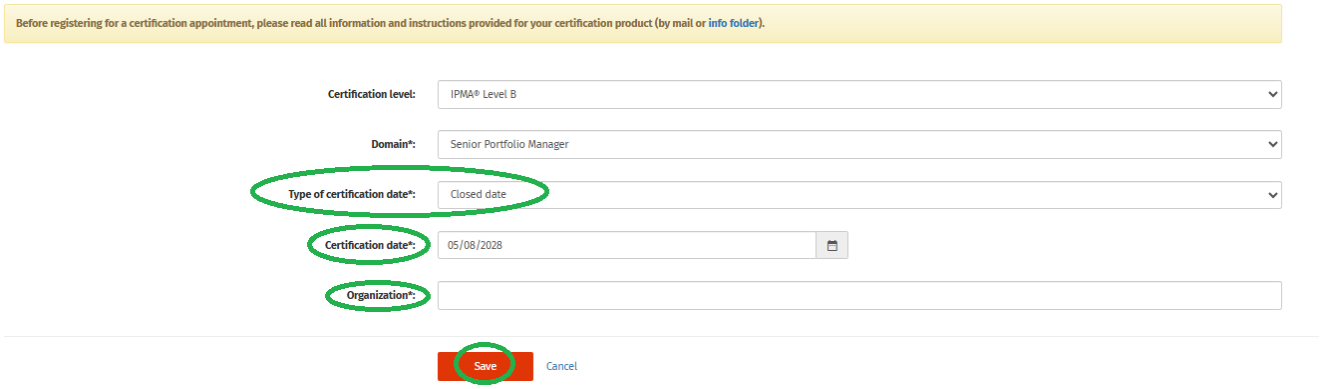


Figure 4: option 2 –application to an closed date

2.3 Uploading the application documents

Please upload the following application documents, which you have completed directly in the documents, as a **ZIP file** (you will receive the application documents in advance from the pma Certification Body – please contact them by e-mail):

- **Application form** Senior Portfolio Manager pma/IPMA® Level B
- **Self-assessment** Senior Portfolio Manager pma/IPMA® Level B
- **Complexity Sheets** Senior Portfolio Manager pma/IPMA® Level B (for each Portfolio indicated)
- **Executive Summary Report** Senior Portfolio Manager pma/IPMA® Level B

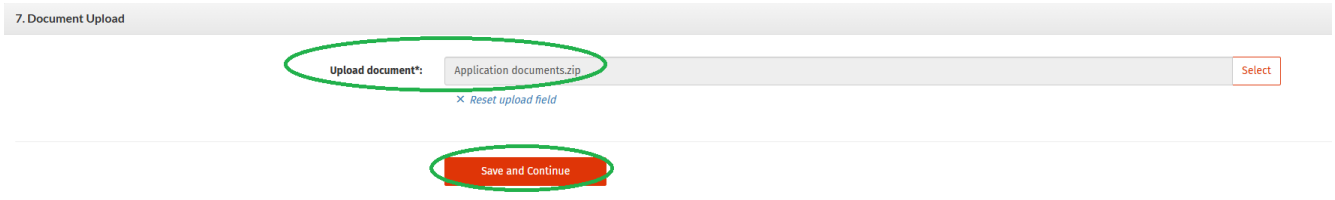


Figure 5: uploading the application documents

2.4 Confirm and send application

You have now completed the online application form. You will be informed about the currently valid payment modalities. Please read these carefully. You must agree to the terms of payment in order to complete the registration process.
The **current certification fees** can be found on the pma website.
Furthermore, you must use the **'Yes/No'** button to select whether you agree or disagree **to the publication of your first name and surname on the pma and IPMA® website upon successful certification**.
Finally, you must agree that you confirm the "approve the validity of the entered data"; that you have read and agree to the "terms and conditions of the imprint", the "general terms of use", the "privacy policy", the "right of withdrawal for customers", the "pma code of ethics" and the "behaviour rules"; the "data privacy policy" and the "terms of participation" of consent to participate in the pma certification programme and the information on exercising the right of withdrawal - cancellation policy. You thereby accept the terms and conditions and apply bindingly for the certification examination.

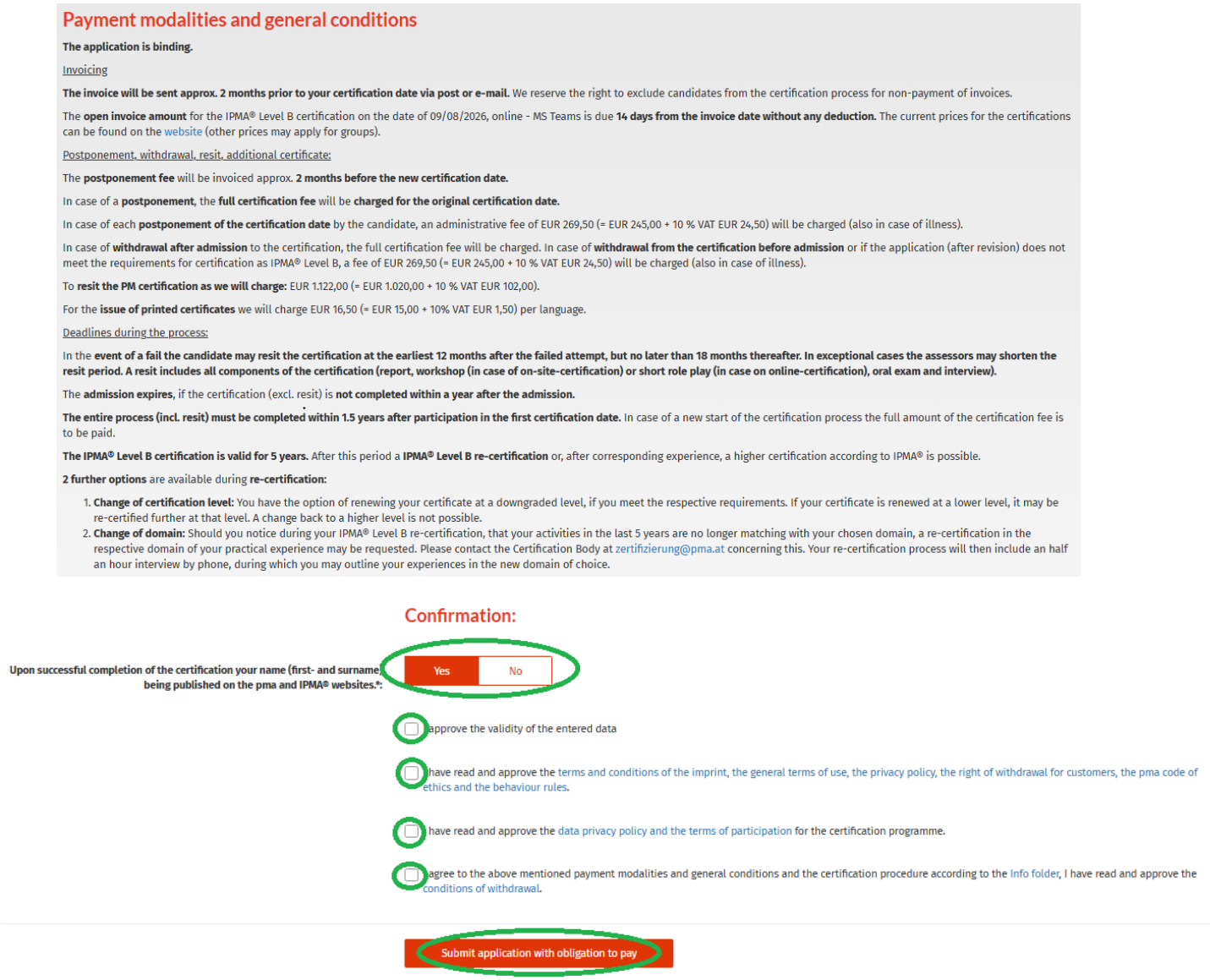


Figure 6: confirm and send application

3 Payment modalities and general conditions

The application is binding.

Invoicing

The invoice will be sent approx. 2 months prior to your certification date via post or e-mail. We reserve the right to exclude candidates from the certification process for non-payment of invoices.

The **open invoice amount** for the pma/IPMA® Level B certification on the date of the registered certification date according to the registration is due **14 days from the invoice date without any deduction.** The current prices for the certifications can be found on the pma website (other prices may apply for groups).

Postponement, withdrawal, resit, certificate:

The **postponement fee** will be invoiced approx. **2 months before the new certification date**.

In case of a **postponement**, the **full certification fee** will be **charged for the original certification date**.

In case of each **postponement of the certification date** by the candidate, an administrative fee of EUR 269,50 (= EUR 245,00 + 10 % VAT EUR 24,50) will be charged (also in case of illness).

In case of **withdrawal after admission** to the certification, the full certification fee will be charged. In case of **withdrawal from the certification before admission** or if the application (after revision) does not meet the requirements for certification as IPMA® Level B Senior Portfolio Manager, a fee of EUR 269,50 (= EUR 245,00 + 10 % VAT EUR 24,50) will be charged.

To **resit the PM certification as Senior Portfolio Manager** we will charge EUR 1.122,00 (= EUR 1.020,00 + 10 % VAT EUR 102,00).

During application, if you select a printed version of the certificate, a fee of EUR 16,50 (= EUR 15,00 + 10% VAT, EUR 1,50) will be charged for each printed certificate (in German or English).

Downloading the certificate is free of charge and can be done multiple times until the last day of the certificate's validity.

Deadlines during the process:

In the **event of a fail the candidate may resit the certification at the earliest 12 months after the failed attempt, but no later than 18 months thereafter. In exceptional cases the assessors may shorten the resit period. A resit includes all components of the certification (report, workshop (in case of on-site-certification) or short role play (in case on online-certification), oral exam and interview).**

The **admission expires**, if the certification (excl. resit) is **not completed within a year after the admission**.

The entire process (incl. resit) must be completed within 1.5 years after participation in the first certification date. In case of a new start of the certification process the full amount of the certification fee is to be paid.

The pma/IPMA® Level B certification is valid for 5 years. After this period a **pma/IPMA® Level B re-certification** or, after corresponding experience, a higher certification according to pma/IPMA® is possible.

2 further options are available during **re-certification**:

1.) **Change of certification level:** You have the option of renewing your certificate at a downgraded level, if you meet the respective requirements. If your certificate is renewed at a lower level, it may be re-certified further at that level. A change back to a higher level is not possible.

2.) **Change of domain:** Should you notice during your pma/IPMA® Level B re-certification, that your activities in the last 5 years are no longer matching with your chosen domain, a re-certification in the respective domain of your practical experience may be requested. Please contact the Certification Body at zertifizierung@pma.at concerning this. Your re-certification process will then include a half an hour interview by phone, during which you may outline your experiences in the new domain of choice.

4 Consent or declaration of consent under data protection law for participation in the pma certification programme (independent certification body of pma - Projekt Management Austria)

I hereby declare my consent to the collection, storage and processing of my data within the framework of the admission procedure and my participation in the certification programme of pma (independent certification body of pma - Projekt Management Austria).

In particular, this includes the following information: Name, first name, maiden name, title, date of birth, place of birth, nationality, membership number, address, gender, identification number, private and business contact details (telephone number, e-mail address), details of my employer (including name, address and contact details of my employer), details of my qualifications (in particular details of projects, references, my CV) and details of my assessment of skills in accordance with the required documents, as well as details of references (confirmation of project activities by persons with company name, name, function, telephone number, e-mail address).

In all other respects the consent is valid for the data which can be seen from the registration forms and the documents of pma - Projekt Management Austria requested during the certification process.

I also declare my consent that my aforementioned data will be passed on to the assessors who are entrusted with my admission procedure for certification as well as with the implementation of my certification procedure. Furthermore, I consent to pma - Projekt Management Austria passing on my name (first and last name), the certification level and the number of my certificate to IPMA® (IPMA® International Project Management Association, http://www.ipma.world) for listing in the Database of Certified Professionals (http://ipma.world/individuals/certification/database-of-certified-professionals). In addition, I agree that pma - Projekt Management Austria will publish my name (first and last name) as well as the certification level of my certificate on the website of pma - Projekt Management Austria - in the category Certified Project Managers https://www.pma.at/en/certification/certified-project-managers - with a valid certificate.

Consent is given to pma - Projekt Management Austria (independent certification body of pma - Projekt Management Austria), Türkenstraße 25/2/21, 1090 Vienna, Tel.: +43 3192921 – 0, issued as responsible.

I have been informed that I can revoke this consent for the publication of my data at IPMA® and pma at any time free of charge.

The revocation of my consent can be made by e-mail to office@pma.at.

In addition, I have been informed of the rights to which I am entitled, in particular my rights to information, correction and deletion of the data collected about me as well as my right to object to data processing and disclosure of the data.

My data which is collected during the admission procedure and my participation in the certification programme of pma (independent certification body of pma - Projekt Management Austria) will not be passed on to third parties (with the exception of the bodies named in this consent).

I am also aware that I am entitled to appeal to the responsible regulatory authority.

I declare that I voluntarily give this consent in accordance with the above information and explanations in order to participate in the admission procedure and certification programme of pma - Projekt Management Austria.

The candidate confirms that he/she has taken note of the **code of ethics** and will act accordingly as a certified Senior Project Manager (pma/IPMA® Level B) or as a pma member.

The candidate confirms that his/her details are correct and expressly consents to the electronic processing and storage of his/her data (personal data, examination documents, etc.) by pma and by bodies expressly authorised to do so by pma.

5 Information on Exercising the Right of Revocation – Canellation Policy

You have the right to revoke this contract for (re-)certification registration within fourteen days without giving reasons. The revocation period shall be fourteen days from the date of conclusion of the contract. The revocation of an application for (re-)certification requires a new application for (re-)certification with all associated costs and deadlines.

In order to exercise your right of revocation, you must inform us of your decision by stating your name, address, telephone number and e-mail address in a clear statement (e.g. a letter sent by post, e-mail). You have the right to revoke this contract within fourteen days without giving reasons. You can use the sample revocation form linked in the imprint of the pma website.

6 Certification briefing

Certification briefings are binding informative meetings for IPMA® Level B & C candidates, at which the certification process (application/report/certification day) is discussed in detail. Certification briefings take place online as a webinar.

We recommend participating in the certification briefing prior to preparing the report.

- Briefing dates can be found on the pma website at **Events**

7 Report process

The report process consits of:

- Preparation and submission of the report to the assessor by the candidate via the Self Service Tool and
- Feedback on the report by the assessor, also via the Self Service Tool

7.1 Report

- Management- summary (incl. lessons learned, insights, reflection) of the complex portfolio with individual selection of PfM plans.
- **Relevant explanations** of the PfM plans are to be provided directly with the plans in the report, as well as direct references to other/related PfM plans, if applicable. In addition, brief description of stakeholders, objectives, results, resources..
- **Presentation of the Portofliomanagement** in the organisation.
- **Interpretation of the competencies** (using the STAR method) of the very complex portfolio (a selection of all 3 compentence areas will be explained and defined in more detail in the certification briefing).

  Number of competence elements per competence area
  - **Perspective: 5**
  - **People: 8**
  - **Practice: 6**
- The aim of the report is for the assessor to be able to evaluate the certification candidate's PfM qualifications (knowledge and experience).

Criteria for the selection of a Portfolio for the report

Please select for the report exclusively

- a complex Portfolio (according Complexity Sheet / > 25 points),
- that you have led by yourself as PfM.

Attention:

- The candidate must ensure that the portfolio in the report is allowed to be handled from the portfolio managing company (a corresponding confirmation to pma is not required).

Formal rules

- The report is to be prepared by the candidate herself/himself.
- The Portfolio description has to be clearly understandable for the asserssors.
- Real, not fictitious: Portfolio data can be anonymous but must not be modified.
- Additional PfM-plans can be attached in the Appendix – if useful.
    - Processing of selected competencies (Perspective, People and Practice Competencies):
        - Exactly the required number of competence elements has to be treated.
        - The individual competence elements should be marked as text heading according to the ICB for Portfolio Management Version 4.0 competence element number and linked to the general table of contents of the report.
- The report is to be **submitted via the Self Service Tool** (**at the latest 3 weeks** before the certification day):
    - File format & size: **PDF** or in the case of two documents as a **ZIP** file (using a Windows-compatible standard ZIP program), max. 5 MB, font size 11, line spacing 1.5.
    - It must be ensured that the report can be printed in A4 format in black and white and is legible prior to submission.
    - A maximum of **2 documents** will be accepted (report + 1 appendix).
    - The number of pages of the report should not exceed **25 pages.** Including appendix: maximum 40 pages.
    - For security reasons, Excel and MS Project files are to be saved as PDF documents and only these PDF documents are to be used in the report or the appendix.

Timetable

- Submission of the **complete** report **3 weeks at the latest** prior to certification day by Self Service Tool.
- Receipt of feedback from the assessor **1 week at the latest** prior to the certification date by Self Service Tool.

7.2 Feedback on the report

Only **complete reports** will be evaluated according to the structure in section 7.3. It is not intended that a revised report is submitted to the certification body after feedback by the assessor.

7.3 Structure of the report for certification as a Senior Portfolio Manager

The table below lists

- the necessary chapters
- a description of the necessary chapter contents and
- the required numbers of pages.

For guidance the relevant competence elements according to ICB for Portfolio Management Version 4.0 is indicated where applicable.

Chapter	Contents	Number of pages
Chapter 1:	• Management-Summary of the complex Portfolio with individual selection of PfM plans • Individual selection on PfM-Plans • In addition, brief description of stakeholders, objectives, results, resources	approx. 10 pages
Chapter 2:	• Presentation of the Portfolio management in the organisation (evaluations, selection, to do's,...)	approx.2 – 4 pages
Chapter 3:	• Management challenges: Interpretation of competencies based on the KCIs (using the STAR method) of the complex portfolio. Details of this will be further explained and defined in the certification briefing.definiert. • Number of competence elements per competence area: o **Perspective: 5** o **People: 8** **<u>of which „4.4.5 Leadership“ is mandatory!</u>** o **Practice: 6** • The competence elements should be discussed from the candidate's personal point of view according to the following structure: o Heading with KE number and designation and KCInumber(s) o **S**ituation & Challenges o **T**asks o **A**ctivities o **R**esults	10 – 13 pages
Total number of pages:		**maximum 25 pages**
Appendix:	• Possible alternative plans • Relevant company or Portfolio documents • Minutes, reports, etc.	maximum 15 pages

8 Certification day

Requirements:

- Admission to the certification
- A fully completed report submitted on time via the Self Service Tool

On certification day the following certification steps take place:

- Workshop – during an „on-site certification“

  respectively.

  short role play (negotiation sequence) –during an „online certification“

- Oral exam – in the case of an „on site certification“ or an „online certification“
- Interview – in the case of an „on site certification“ or an „online certification“

After completion of the (online) certification, you will receive a verbal feedback from your assessor. There will be no additional written feedback (any queries should therefore be addressed directly to the assessor. If necesary, you can also make a note of this verbal feedback).

Identification with offical photo ID on the certification day.

Objectives of the certification day:

- Completion of the certification
- Assessment of the Portfolio-competence of the candidate according to ICB für Portfolio Management Version 4.0 und methods & processes of Portfoliomanagements.

8.1 Content of the certification day – during an „on-site certification“

- **Workshop**
  - Solving PM//PfM-tasks in teams
  - Role play with different PM/PfM-roles
  - Participants: 3-5 certification candidates, 2 assessors

  Duration: 2 hours per 4 participants

- **Oral exam**
  - Completion of a task and presentation using a flip chart (or similar), as well as further questions

  Duration: 1,5 hours (incl. ½ hour preparation time)

- **Interview**
  - Interview on the PfM competences (perspective, people and practice competences) according to ICB Portfolio Management Version 4.0 and methods & processess of the latest pm baseline
  - Participants: 2 assessors, 2 candidates

  Duration: 1,5 hours

8.2 Content of the certification day – during an „online certification“

- **Oral exam**
  - Questions regarding your knowoledge of PfM competences (perspective, people, practice competencies) according to ICB Portfolio Management Version 4.0 and methods & processess of the latest pm baseline

- **extended Interview**
  - Interview on PfM competencies (perspective, people, practice competenecies) according to ICB Portfolio Management Version 4.0 and methods & processes of the latest pm baseline.
    Short role play (negotiation sequence)

Participants: 2 assessors, 1 candidate

Duration: total 120 minutes (oral exam and extended interview)

Video Conference Tool

The online certification is done via a Video Conferencing Tool (MS Teams). You can join a video conference directly via PC, laptop, notebook or tablet without downloading the client.

Together with your invitation for online-certification you will receive the time schedule, the link and instructions for logging in.

The certification is not recorded by pma. Recording by the candidate is expressly prohibited.

IMPORTANT: please note that video and audio transmission must be guaranteed during the entire online certification in the video conference tool. The candidate must ensure that a stable internet connection is available during the online certification. The constant visibility and audibility of the candidate via video must be ensured for the entire online certification in order to evaluate it.

The following **requirements** are necessary **for** an **online certification** and must be provided **by the candidate**:

Headphones/microphone:

Please test your audio equipment in advance so that our pma employee can understand you well. We recommend the use of a high quality headset.

Video:

You will need a webcam or a camera from your PC, laptop, notebook or tablet to participate in the online certification. Please test beforehand whether you are clearly visible in the picture and remove objects from the background that should not be visible to our assessors.

9 Overall assessment

The overall assessment covers the entire process: report, workshop (during an „on-site certification) respectively short role play (during an „online certification“), oral exam and interview.

The candidate must demonstrate throughout the certification process that he/she masters at least 80 % of the competence elements of the ICB for Portfolio Management Version 4.0 in complex Portfolios situations.

10 Assessors

The list of current assessors can be found on **website**.

Please go through the list: should you (due to a professional circumstance - e.g. competition, tender, etc. - not for personal reasons) have to rule out an assessor, please send notification of this, including justification, upon submitting your application:: zertifizierung@pma.at

11 Application documents

- ⊗ **Application form** Senior Portfolio Manager pma/IPMA® Level B ☐
- ⊗ **Self-assessment** Senior Portfolio Manager pma/IPMA® Level B ☐
- ⊗ **Complexity Sheet** Senior Portfolio Manager pma/IPMA® Level B ☐
- ⊗ **Executive Summary** Senior Portfolio Manager pma/IPMA® Level B ☐

Please upload these application documents as a ZIP file directly in your online application in the Self Service Tool (see point 2.3).