# Info folder for certification as Portfolio Director pma/IPMA® Level A


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Relevant certification documents:

- Info folder Portfolio Director pma/IPMA® Level A
- Application documents (Application form Portfolio Director pma/IPMA® Level A, Self-assessment Portfolio Director pma/IPMA® Level A, Complexity Sheet Portfolio Director pma/IPMA® Level A, Executive Summary Report Portfolio Director pma/IPMA® Level A)
- The ICB4 for 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. This is followed by online application via the “Self Service Tool” (log in on the pma website).

The documents can be downloaded free of charge from www.pma.at or can be provided by the pma Certification Body via email. For 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 email regarding requirements and application documents
- online application
- Admission
- Certification briefing
- Report
- Certification day
- Overall assessment
- after successful certification, the candidate will receive a certificate with a validity of 5 years

## 1.2 Requirements for the certification

**Knowledge:**

- Specialized knowledge in the field of project-, program- and portfolio management in accordance with the ICB4 for Portfolio Management Version 4.0
- Methods and processes of portfolio management

**Experience (in portfolio management within the last 12 years):**

- at least 5 years of experience (= 900 person days PD; 1 year = 180 PD) as overall responsible portfolio manager of very complex portfolios at a strategic level.

OR

- at least 4 years of experience (= 720 person days PD; 1 year = 180 PD) as overall responsible portfolio manager of very complex portfolios AND
- at least 3 years of experience (= 540 person days PD; 1 year = 180 PD) in leading other individuals during the project-/program-/portfolio-lifecycle as overall responsible project-/program manager of very complex projects/programs at a strategic level
- The candidate must explain in the application documents why projectportfolios/programs/projects fulfill the complexity and strategic relevance required for Portfolio Director pma/IPMA® Level A, and assessors will evaluate this complexity and strategic level.

**Certification briefing:** scheduling coordinated individually with the assessor.

## 1.3 Overview of the certification process as a Portfolio Director

Duration: approx. 6 months

Registration at pma website; online application via the "Self Service Tool" (log in on the pma website) incl. uploading following documents:
Application form, Self-assessment, Complexity sheet und Executive Summary Report
(**at least 5 months** before the planned certification date)

If required: feedback on the application documents by the assessor via the "Self Service Tool".
If necessary, modification of the application documents by the candidate and submission via the "Self Service Tool" (**at the latest 4 months** before the planned certification date)

Admission to the certification

Invoicing
(invoice will be sent by post or email, approx. 2 months before the certification date)

Payment

Certification briefing – coordination with the assessor regarding the report and definition of the certification date

Preparation of the report

Submission of the report via the "Self Service Tool"
(**at the latest 8 weeks** before the certification date)

Feedback from the assessor on the report via the "Self Service Tool"
(**at the latest 5 weeks** before the certification date)
if needed: revision of the report and submission of the final version via the "Self Service Tool"
(**at the latest 2 weeks** before the certification date)

Preparation for the interview (in writing amongst other things)

Certification date: Interview

if certification is not successful – transmission of the result
(via email, within **2 weeks** after the certification date)

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. The certificate is valid for 5 years.

**The entire schedule for the certification as pma/IPMA® Level A Portfolio Director is individually agreed upon.**

# 2. Application Process

The application process is segmented into the following steps:

- Registration on the pma website
- Complete the online application via the "Self Service Tool" (log in on the pma website) – the 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** Portfolio Director pma/IPMA® Level A
    - **Self-assessment** Portfolio Director pma/IPMA® Level A
    - **Complexity Sheets** Portfolio Director pma/IPMA® Level A (for each specified portfolio)
    - **Executive Summary Report** Portfolio Director pma/IPMA® Level A
- Review of the application documents by the **Certification Body**
- Admission to the certification by the **Certification Body**

**** all application documents can be obtained directly from the pma Certification Body - please contact them in advance by email.**

## 2.1 Registration on the pma website

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

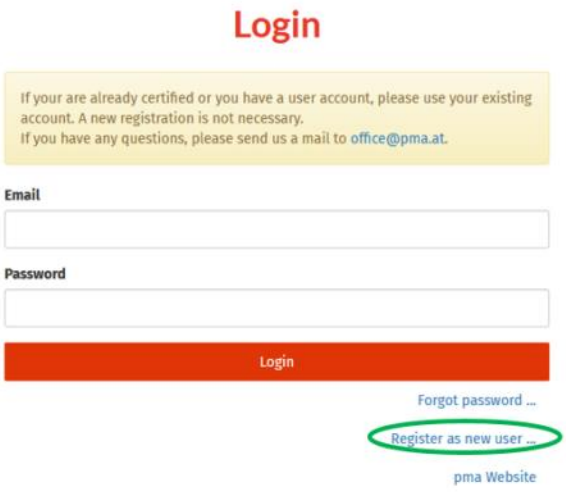


Image 1: registration as a new user

After successful registration, please check your email inbox and confirm the link, which you received via email from pma.

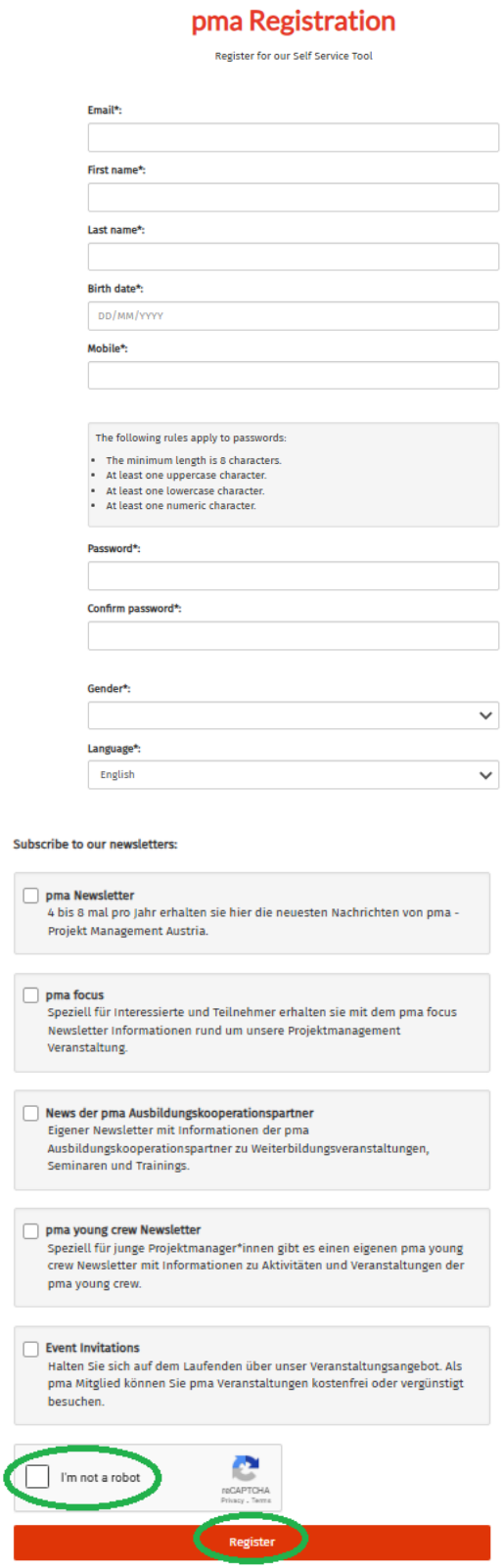


Image 2: registration

## 2.2 Selection of the certification 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

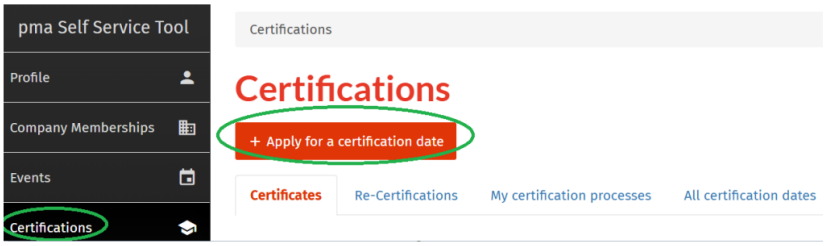


Image 3: application to a certificate date

First, please select the **"certification level" "IPMA® Level A"** and then the **domain "Portfolio Director"**. Enter the planned date in the "Certification date" field.

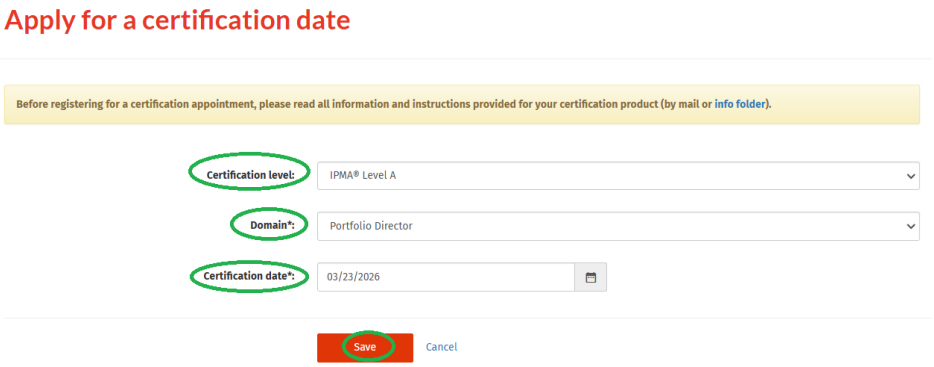


Image 4: select level & domain

## 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 email):

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

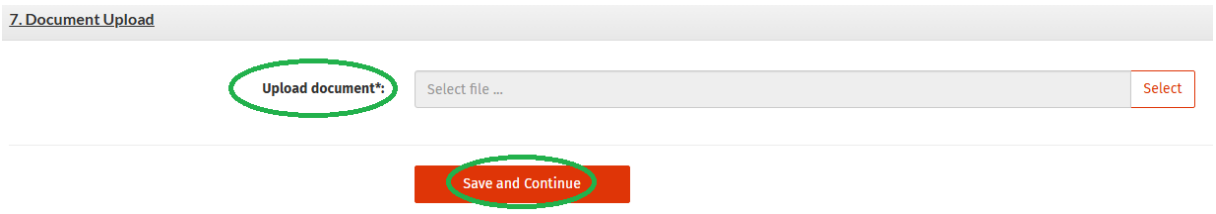


Image 5: uploading the application docuements

## 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.

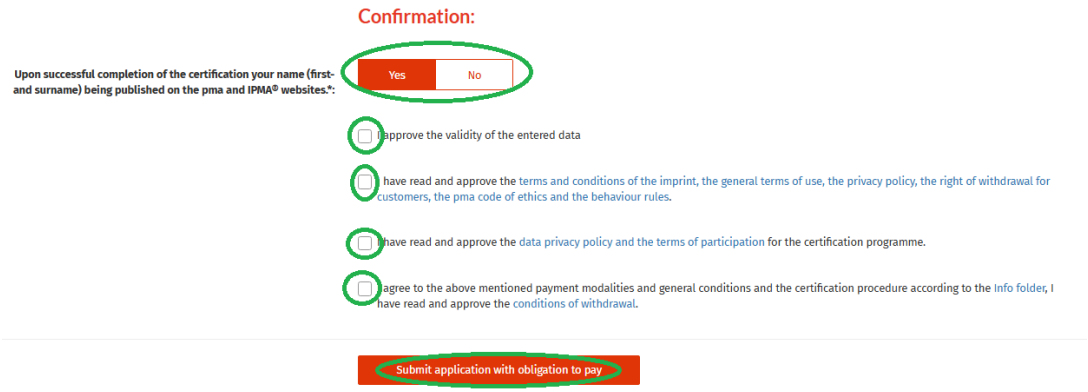


Image 6: confirm and send application

# 3. Payment modalities and general conditions

**The application is binding.**

**Please note that there will be changes to all fees for certification dates from 1st of January 2027 onwards.**

Invoicing

**The invoice will be send 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 A 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.

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 (also in case of illness) will be charged:
**2026:** EUR 269,50 (= EUR 245,00 + 10 % VAT EUR 24,50)
**2027:** EUR 279,40 (= EUR 254,00 + 10 % VAT EUR 25,40)

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 pma/IPMA® Level A Portfolio Director, following fee will be charged:
**2026:** EUR 269,50 (= EUR 245,00 + 10 % VAT EUR 24,50)
**2027:** EUR 279,40 (= EUR 254,00 + 10 % VAT EUR 25,40)

To **resit the PM certification as Portfolio Director** we will charge:
**2026:** EUR 1.122,00 (= EUR 1.020,00 + 10 % VAT EUR 102,00)
**2027:** EUR 1.162,70 (= EUR 1.057,00 + 10 % VAT EUR 105,70)

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 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 A certification is valid for 5 years.** After this period a **pma/IPMA® Level A re-certification** 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 A 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 pma 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 Portfolio Director (pma/IPMA® Level A) 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 - Cancellation 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 ordert o exercixse your right of revocation, you must inform us of your decision by stating you 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 withour giving reasosn. You can use the sample revocation from linked in the imprint of the pma website.

# 6. Certification briefing

The certification briefing, during which the certification process (report/certification day) is discussed in detail, is mandatory. The certification briefing is individually scheduled with the assessor.

# 7. Report process

The report process consists of:

- Preparation and submission of the report to the assessor by the candidate via the “Self Service Tool” and
- Submission of feedback on the report by the assessor, also via the “Self Service Tool”

## 7.1 Report

- **Management summary** of the very complex portfolio with an individual selection of Project Portfolio Management (PPM) plans.
- **Relevant explanations** of the project-portfolio-plans must be included directly with the plans in the report, as well as, if applicable, direct references to other/related project-portfolio-plans.
- Additionally, a brief description of stakeholders, objectives, results, resources.
- **Presentation of portfolio management** within the organisation**.**
- **Interpretation of competencies** (based on the STAR-method) of the very complex portfolio (a selection from all 3 competence areas will be discussed and defined in more detail during the certification briefing).
- **Brief description** of another very complex portfolio at a strategic level, or 1–2 very complex portfolios or very complex programs/projects at a strategic level: situation, context, problem definition, problem solution (or proposed solution) (management-summary incl. lessons learned, insights, reflection).
- The objective of the report is to enable the assessor to evaluate the candidate’s portfolio management qualification (knowledge and experience).

**Criteria for the selection of a Portfolio for the report:**

Please select for the report exclusively

- **A very complex Portfolio** (according Complexity Sheet / > 32 points),
- **which you have personally managed as a project portfolio manager**.

**Attention:**

- The candidate must ensure that the portfolio described in the report may be presented by the organization conducting the portfolio (a formal confirmation to pma is not required).

**Formal rules:**

- The report must be prepared **by the candidate herself/himself**.
- The Portfolio description has to be clearly understandable to the assessors.
- **Real and not fictional**: Portfolio data can be anonymous, but must not be modified.
- Additional project-portfolio-plans should be attached in the appendix, if appropriate.
- **Processing of selected competencies elements** (Perspective and People, as well as Practice Competencies):
  - **Each competence element** should be marked using the ICB4 competence element number as a text heading and **linked to the general table of contents of the report**.
- The report must be **uploaded via the "Self Service Tool"** by the specified deadline.
  - File format & size: **PDF** or, if two documents, as a **ZIP** file (using a Windows-compatible ZIP standard program), max. 5 MB, font size 11, line spacing 1.5.
  - Before submission, it must be ensured that the report is printable and readable in A4 format, black and white.
  - A maximum of **2 documents** will be accepted (report + 1 appendix).
  - The total length 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 **no later than 8 weeks** before the certification day, via the "Self Service Tool".
- Feedback from the assessor to be provided **no later than 5 weeks** before the certification day, via the "Self Service Tool".
- If needed: revision of the report and submission of the final version **no later than 2 weeks** before the certification day, via the "Self Service Tool".

## 7.2 Structure of the report for certification as Project Portfolio Director

The following table lists:

- the necessary chapters
- a description of the necessary content for each chapter, and
- the respective required number of pages.

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

| Chapter | Content | Scope |
|---|---|---|
| **Chapter 1:** | • Management summary of the mega portfolio with an individual selection of project-portfolio-plans<br>• Individual selection of project-portfolio-plans<br>• Additionally, a brief description of stakeholders, objectives, results and resources. | approx. 10 pages |
| **Chapter 2:** | • Presentation of Portfolio management within the organisation (evaluations, selection, to-dos, ….) | approx. 2 - 4 pages |
| **Chapter 3:** | • Management challenges: Interpretation of competencies** (based on the STAR-method) of the very complex portfolio.<br>The number of competence elements** to be considered here for each competence area, including the total number of competence elements, is explained and defined in more detail in the certification briefing – **with "4.4.5 Leadership" being mandatory**.<br><br>** Heading, CE number and description, and KCI number(s) | approx. 8 pages |
| **Chapter 4:** | • Brief description of another very complex portfolio at a strategic level, or 1–2 very complex portfolios or very complex projects/programs at a strategic level: situation, context, problem definition, problem solution (or proposed solution) (management summary incl. lessons learned, insights, reflection) | approx. 2 – 3 pages |
| **Total number of pages:** | | **maximum 25 pages** |
| **Appendix:** | • Optional additional plans<br>• Optional company- or project documents<br>• Minutes, reports, etc. | maximum<br>15 pages |

# 8 Certification day

**Requirements:**

- Admission to certification
- A fully completed report (and, if applicable, revised final version) submitted on time via the "Self Service Tool"

**Preparation for the interview: (in writing, amongst other things)**

**Certification day:**

- Interview incl. questioning by assessors based on the candidate's written processing and preparation

**Identification with official photo ID on the certification day.**

**After the certification, you will receive a verbal feedback from your assessor.** There will be no additional written feedback provided (therefore, please address any questions directly to your assessor during the session. You may take notes of the verbal feedback if necessary).

**Objectives of the certification day:**

- Completion of the certification
- Assessment of the candidate's portfolio management competence according to ICB4 and portfolio management methodologies & processes

**Components of the certification day:**

- **Interview**
  - Presentation of the portfolio
  - Interview on PfM competencies (Perspective, People and Practice competencies) as defined by ICB4, and portfolio management methodologies and processes – based on the report, including a discussion with assessors following the candidate's written processing and preparation
  - Participants: 2 assessors, 1 candidate

  Duration: 2-3 hours

# 9 Overall assessment

The overall assessment covers the entire process: report and interview, including questioning by the assessors based on the candidate's written processing and preparation.

The candidate must demonstrate throughout the entire certification process that he/she masters at least 80% of the competence elements of the ICB4 for Portfolio Management in very complex portfolios.

# 10 Assessors

The list of current assessors can be found on the pma website.

Please review this list: should you (due to professional circumstances - 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 by email.

# 11 Application documents

⊗ **Application form** Portfolio Director pma/IPMA® Level A ☐

⊗ **Self-assessment** Portfolio Director pma/IPMA® Level A ☐

⊗ **Complexity Sheet** Portfolio Director pma/IPMA® Level A ☐

⊗ **Executive Summary** Portfolio Director pma/IPMA® Level A ☐

| | |
|---|---|
| **Next step:** | **Please upload these application documents as a ZIP file directly via your online application in the "Self Service Tool" (see section 2.3).** |