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| Report Guidelines *Levels A and B, All Domains* |  |

***Please support our commitment to sustainability and do not print   
this document unless it is absolutely necessary to do so.***

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| 1. General Information | |
| Questions? | If you have any questions about how to prepare your report, contact us at: Cert-Operations@IPMA-USA.org |
|  | This document was designed by IPMA-USA for use in its certification program. The design of this document is licensed to others under the Creative Commons Attribution 4.0 International License. For a copy of this license, visit: http://creativecommons.org/licenses/by/4.0/ |
| Privacy and Confidentiality | All IPMA-USA certification program staff and contractors are covered by a strict Non-Disclosure Agreement (NDA). We can provide a copy of our standard NDA upon request.  In addition, IPMA-USA specifically warrants that it will not:   * Use your report for any purpose other than to evaluate your suitability for certification. * Share your report in whole or in part with anyone not directly involved with your assessment.   If the above assurances are insufficient, we can negotiate a more detailed NDA. However, the NDA must be signed *before* you submit any documents. Redacted documents are not acceptable. |

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| 2. Evidence of Competence | |
| Criteria | *Your report will provide the bulk of the evidence your assessors will use to evaluate your competence.*  Your assessors will be looking for *clear and convincing evidence* to enable them to evaluate your skills and abilities against the Key Competence Indicators (KCIs) in IPMA’s Individual Competence Baseline (IPMA ICB). |
| Clear and Convincing Evidence | Clear and convincing evidence means that the assessors’ conclusions are:   * Substantially more likely to be true than not * So clear as to leave no substantial doubt * Sufficiently strong to command the belief of a reasonable mind |
| Basis of Assessment | The IPMA Individual Competence Baseline describes the competence elements that will be used to assess your competence. If you are not already familiar with the IPMA ICB, you should review it prior to continuing with the application process. You can download a ***free*** copy as follows:   * Go to https://shop.ipma.world/ * Click on the link to purchase the hard copy version * Click on the link to download the free e-Book.   All levels must demonstrate competence against 80% of the IPMA ICB Competence Elements. Demonstrated competence requires evidence for at least 50% of the KCIs within that element. |

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| 3. Experience Requirements | |
| Your Role | You must have served as the Director or Manager of any project, program, or portfolio which provides evidence of your competence. You could have had a different title, but you must have had the responsibilities of a Project, Program, or Portfolio Director or Manager. |
| Common Requirements | Every project, program, or portfolio mentioned in your report must:   * Be from the domain (project management, program management, or portfolio management) that you applied for. * Meet the minimum management complexity requirements for the level that you applied for (32 for Level A; 25 for Level B). * Have been included in the Experience-Summary submitted with your application. |
| Projects | Every project mentioned in your report must:   * Meet the currency requirements for your level (have begun within the past 12 years for Level A; within the past 8 years for Level B). * Be complete or substantially complete (more than 75%). |
| Programs | Every program mentioned in your report must:   * Meet the currency requirements for your level (been active for at least 1 year during the past 12 years for Level A; during the past 8 years for Level B). * Have been managed by you for at least 12 months during the currency period. |
| Portfolios | Every portfolio mentioned in your report must:   * Meet the currency requirements for your level (been active for at least 1 year during the past 12 years for Level A; during the past 8 years for Level B). * Have been managed by you for at least 12 months during the currency period. |

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| 4. Technical Requirements | |
| ***We reserve the right to reject any report that doesn’t comply with the requirements in this section.*** | |
| Format | One Portable Document Format (PDF) file. If multiple files are used to prepare the report, they must be consolidated into one prior to submission. |
| Features | Your report should contain all the standard features of a high quality document, e.g.: page numbers, table of contents, easily readable fonts, and clearly visible headings and subheadings.  The use of color to support readability is encouraged, but not required. |
| Design | Text should be single spaced, 11 point type. Pages should have 0.8-1” margins. |
| Length | Your report should have 20-25 pages (15,000-20,000 words) and up to 15 pages of appendices. |
| Writing Style | Avoid jargon. Your report should be understandable by managers who have limited knowledge of project, program, or portfolio management or who have experience in a different industry or domain. |

| 5. Content Requirements | | |
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| 5.1 General Requirements | | |
| Your report should address:   * The management and leadership challenges you dealt with * How you responded to these challenges and the results you achieved   You should present this information from your point of view (i.e., using phrases such as “I experienced” or “I realized”).  See IPMA-USA-Assessment-Interview-Guidance for topics to consider for inclusion. | | |
| 5.2 Specific Requirements | | |
| Professional References | If either or both of the professional references in your application were not involved in at least one of the efforts described in your report, you must include contact information for references who were. | |
| Cross-Reference | Either the title page or the table of contents must contain a list of the projects, programs, or portfolios to be covered in the report, along with a cross-reference to your Experience-Summary. See the sample below in Section 6. | |
| Introduction | The first section of the report (maximum 3 pages) should be a description of the following:   * Key stakeholders and their roles * Scope * Key objectives * Organization(s) involved * Overview of other resources that you were responsible for | |
| Closing Page | The closing (last) page of your report must contain the following declaration:  *“I hereby confirm that the narrative content of this report is entirely my own work, and that I was not assisted by any other person.”*  followed by your signature to attest to the truthfulness of this statement. | |
| 5.3 Structural Options | | |
| General | You are free to select whichever structural option you believe will provide you with the best way to present your evidence. You will not be penalized or rewarded for your choice.  Under all options, you should address KCIs as well as competence elements. | |
| Options | Competence Element | Use a separate sub-section for each competence element. The sequence within the report is optional, but the title of each sub-section must include the competence element number from the current ICB. |
| Competence Element Group | Address each group (perspective, personal, and practice) collectively rather than by individual element. |
| Candidate-Defined | If neither of the above approaches is appealing, you may develop your own structure. For example:   * Chronologically * By stakeholder * By project, program, or portfolio |

| 6. Sample Cross-Reference | | |
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| MCR Reference | Full Name | Short Name |
| A | LNG Steam Blow Off Silencers | Blow Off Silencers |
| B | Foxnet Wind Energy Project | FWE |
| C | MegaCorp Global ERP Implementation | MCG |