**Report - Portfolio Management IPMA Level A and B**

[ ]  IPMA Level A

[ ]  IPMA Level B

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| Portfolio | [Name of the reference portfolio] |

|  |  |
| --- | --- |
| First name, last name |  |
| Employer |  |
| e-mail |  |
| Telephone | [Provide number for follow-up enquiries] |

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| Version | [Version number of the report] |
| Date |  |

Formal criteria

|  |  |
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| Submission | After receiving the task 'Upload report' as a single PDF file including attachments |
| File name | Last name\_first name\_PB\_Vn (n = version number of the version you submit) |
| Number of pages | Maximum 25 pages, excluding title page and indices, plus a maximum of 15 pages of enclosures |
| Font | Please use Verdana 10, do not change the font or size of the text |
| Tables | Smaller text sizes are permitted, at least 8 Pt. |
| Headings | Use formats from the format templates |
| Reference text | Remove grey reference text after completing the document |

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##### Abbreviations used

Please list all abbreviations used in this document in alphabetic order.

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# Background information about the portfolio

This chapter should be a maximum of 3 pages (including charts) long, and should provide the assessors with background information about your portfolio. You may copy and paste information from the executive summary report. In particular, you should document changes here that have been made since the executive summary report was submitted.

## Strategic goals and results of the portfolio

Describe the strategic goals that are to be implemented by means of your portfolio, as well as the originally planned results of the portfolio. Identify any possible amendments, or state if it did not prove possible to achieve the intended results.

## Key stakeholders

List the most important stakeholders together with their influence or their significance for the portfolio and its components - programmes and projects - as well as its success.

## Portfolio organisation and roles in the portfolio

Describe your role in the portfolio, citing your tasks, powers and responsibilities Identify the portfolio organisation. Describe the context of the portfolio, in particular in respect of: dependencies from/to other portfolios, projects and programmes as well as the deployment of persons with a consultancy function.

## Resources

Describe the resources (*Definition see ICB4, Chapter 6.5.8*) that were available to you in the portfolio.

# Portfolio challenges

In this chapter, describe the portfolio management challenges that you were obliged to overcome in your portfolio, how you managed the portfolio and how you mastered the challenges. Please endeavour to describe your competencies as comprehensively as possible, citing specific situations. Describe your actions in the selected situations, and reflect upon the outcome. This structure is based on the STAR methodology that is described in the *Certification guidelines* in the chapter *'Interview'*. We recommend that you use the available space for the description as follows: 20% for the situation description, 60% for the description of your actions and 20% for the outcome reflection. Corroborate your statements with examples from your portfolio documentation. Write in the first person. The assessors must be able to identify which performances you rendered in person.

You must describe your competencies on the basis of the reference portfolio that you cited in the executive summary report. All *ICB4* competencies are listed in the present report in the form of headings. You must describe at least 23 of these in your report. It is up to you to choose which to describe. At the end, delete the headings of the competencies that were not required, and update the table of contents.

Describe as many competence indicators as you need to be able to prove the corresponding competence, namely at least 50%. The concrete number is given in the respective chapter. Reference the competence indicators of *ICB4* in the description of your actions. To do this, enter the relevant chapter number of *ICB4* in brackets at the appropriate text passage. You will also find this in the 'SAPfM' spreadsheet of the certification application. Referencing is mandatory.

If you do not find a situation in your reference portfolio that is sufficiently complex, you can use one from another portfolio, programme or project described in your executive summary report. Please indicate from which portfolio, programme or project the described situation originates. For the situations from the reference portfolio, you do not need to enter this information.

## Competence area perspective

### Strategy *(Chapter 6.3.1 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Governance, structures and processes *(Chapter 6.3.2 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Compliance, standards and regulations *(Chapter 6.3.3 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Power and interest *(Chapter 6.3.4 in ICB4)*

##### Situation (refer to at least 2 competence indicators)

##### Action(s)

##### Outcome reflection

### Culture and values *(Chapter 6.3.5 in ICB4)*

##### Situation (refer to at least 2 competence indicators)

##### Action(s)

##### Outcome reflection

## Competence area people

### Self-reflection and self-management *(Chapter 6.4.1 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Personal integrity and reliability *(Chapter 6.4.2 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Personal communication *(Chapter 6.4.3 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Relationships and engagement *(Chapter 6.4.4 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Leadership *(Chapter 6.4.5 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Teamwork *(Chapter 6.4.6 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Conflict and crises *(Chapter 6.4.7 in ICB4)*

##### Situation (refer to at least 2 competence indicators)

##### Action(s)

##### Outcome reflection

### Resourcefulness *(Chapter 6.4.8 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Negotiation *(Chapter 6.4.9 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Results orientation *(Chapter 6.4.10 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

## Competence area practice

### Portfolio design *(Chapter 6.5.1 in ICB4)*

##### Situation (refer to at least 1 competence indicator)

##### Action(s)

##### Outcome reflection

### Benefits *(Chapter 6.5.2 in ICB4)*

##### Situation (refer to at least 1 competence indicator)

##### Action(s)

##### Outcome reflection

### Scope *(Chapter 6.5.3 in ICB4)*

##### Situation (refer to at least 1 competence indicator)

##### Action(s)

##### Outcome reflection

### Time *(Chapter 6.5.4 in ICB4)*

##### Situation (refer to at least 1 competence indicator)

##### Action(s)

##### Outcome reflection

### Organisation and information *(Chapter 6.5.5 in ICB4)*

##### Situation (refer to at least 2 competence indicators)

##### Action(s)

##### Outcome reflection

### Quality *(Chapter 6.5.6 in ICB4)*

##### Situation (refer to at least 1 competence indicator)

##### Action(s)

##### Outcome reflection

### Finance *(Chapter 6.5.7 in ICB4)*

##### Situation (refer to at least 1 competence indicator)

##### Action(s)

##### Outcome reflection

### Resources *(Chapter 6.5.8 in ICB4)*

##### Situation (refer to at least 2 competence indicators)

##### Action(s)

##### Outcome reflection

### Procurement and partnership *(Chapter 6.5.9 in ICB4)*

##### Situation (refer to at least 1 competence indicator)

##### Action(s)

##### Outcome reflection

### Plan and control *(Chapter 6.5.10 in ICB4)*

##### Situation (refer to at least 2 competence indicators)

##### Action(s)

##### Outcome reflection

### Risk and opportunity *(Chapter 6.5.11 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Stakeholders *(Chapter 6.5.12 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

### Change and transformation *(Chapter 6.5.13 in ICB4)*

##### Situation (refer to at least 2 competence indicators)

##### Action(s)

##### Outcome reflection

### Select and balance *(Chapter 6.5.14 in ICB4)*

##### Situation (refer to at least 3 competence indicators)

##### Action(s)

##### Outcome reflection

# Appendix

##### Enclosures

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| No. | Designation |
|  |  |

##### Declaration

I hereby declare that I wrote the present document without outside assistance.

|  |  |
| --- | --- |
| Place  |  |
| Date |  |
| Signature |  |