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| D:\IPMA\Website\Intranet\323 Official Graphics\IPMA_full_logo_sm.png | Executive Summary ReportIPMA C, B, A LEVEL CANDIDATES |  |

\* maximum of 15 pages

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| **Candidate Name** |  | **Insert link to your CV** |
| **Level Applied for (check one)** |  IPMA Level A |  IPMA Level B |  IPMA Level C |

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| Organisation |
| Organisation name: |  |
| Number of staff |  < 250 |  250 – 5000 |  > 5000 |
| Main line of organisation’s industry | E.g. software development, banking |
| The candidate's role in the organisation |
| Organisational structure (schematically) to highlight the candidate's position |  |
| Area of responsibility |  |
| Overview of project management procedures  | *Describe the organisation's methodological framework that regulates the project management procedures* |
| Relationships with internal and external stakeholders | *Describe your working relationship with internal and external parties in the project / projects* |
| **Summary for all projects**  |
| Name of the project | Project start date | Project finish date | Duration, months | Score of complexity |
| Project #1 |  |  |  |  |
| Project #2 |  |  |  |  |

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| **Summary of the project #1**  |
| Goal of the project and main deliverables (complexity indicator #1) | Project goal definition: * Clarity of benefits, goals, objectives, requirements, expectations, and success criteria (almost all clear - few clear)
* Challenge of attaining benefits, goals, objectives, requirements, expectations, and success criteria (almost all met before - few met before)
* Conflict among goals, objectives, requirements, expectations, and success criteria (almost all aligned - few aligned)
* Stability of assumptions and constraints (almost all the same throughout - few the same throughout)
* Clarity of priorities (almost all clear - few clear)
* Stability of benefits, goals, objectives, requirements, expectations, and success criteria (almost all the same throughout - few the same throughout)
* Interdependency of benefits (very low - very high)
* Amount of cultural and behavioral change included in project scope (very little - major focus)
* Schedule topology (simple logic, few constraints - complex logic, many constraints)
* Process of transitioning into operations (simple - extremely challenging)
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| Tasks, methods, tools and techniques (complexity indicator #2) | * Complexity related to the number of tasks and their interdependence and the team and communication structure (very low complexity - very high complexity)
* Percentage of tasks with major assumptions or constraints (from 0-100%)
* Quality reporting requirements (very relaxed - very strict)
* Availability of proven methods, tools and techniques (always assured - seldom assured)
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| Total budget | Amount of project budget: xxx EUR |
| Resources available (complexity indicator #3) | Personnel :* No of persons total (peak) in the project:
* No of persons reporting to you:

Materials : Technical :Financial funding : * Availability of funding at the project level (mostly assured - seldom assured)
* Availability of qualified staff (mostly assured - seldom assured)
* Availability of other resources (mostly assured - seldom assured)
* Number of independent organizational entities (different CEOs/MDs)
* Number of different technical disciplines involved (1 - 6+)
* Relative size in comparison to other projects done by this organization (1 - 20+)
* Confidence in cost and duration estimates (very high - very low)
* Project Manager’s control over procurement (total - limited)
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| Time schedule and phases | Project start/finish dates: xx.xx.xxxx - xx.xx.xxxxList all phases covered: * Likelihood of meeting schedule targets (90% - less than 50%)
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| Management effort | Total no of menmonths of management/ total number of menmonths of execution: xx menmonths / xx menmonths |
| Contractors | * No of contractors:
* No of subcontractors:
 |
| Stakeholders (complexity indicator #5) | Relationship with internal and external stakeholders: * Number of clearly-identified, active, individual stakeholders (1 - 20+)
* Number of well-defined stakeholder groups (1 - 20+)
* Stability of individual stakeholders and stakeholder groups (few changes - constant changes)
* Location of individual stakeholders and stakeholder groups (internal - many external)
* Degree of public interest (little - national)
* Stakeholder agreement about expected benefits (very high - very low)
* Stakeholder agreement about stated benefits (very high - very low)
* Project Manager’s relationship with stakeholders (warm - strained)
* Presence of legislative or regulatory constraints (none - many)
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| Risk and opportunities (complexity indicator #4) | Number of the risks identified in the project: xx* Percentage of project risk responses within the control of the Project Manager (100% - 0%)
* Percentage of project contingency usable by Project Manager to manage risk responses (100% - 0%)
* Percentage of high probability project risks (0% - 100%)
* Percentage of high impact project risks (0% - 100%)
* Percentage of project risks with proven/reliable responses (100% - 0%)
* Percentage of project risks requiring immediate responses (0% - 100%)
* Percentage of epistemic (vs. aleatory) project risks (0% - 100%)
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| Relations with permanent organisations (complexity indicator #6) | Interfaces of the project, programme or portfolio with the organisation's systems, structures, reporting and decision-making processes: * Project interfaces with the organization’s systems (most fixed - most dynamic)
* Project interfaces with the organization’s structures (most fixed - most dynamic)
* Project interfaces with the organization’s reporting (most fixed - most dynamic)
* Project interfaces with the organization’s decision-making processes (most fixed - most dynamic)
* Approvals for planned needs (mostly assured - seldon assured)
* Approvals for unplanned needs (mostly assured - seldon assured)
* Permanent organization has successfully completed similar projects (many - none)
* Project’s impact on the ongoing operations of the organization (very low - very high)
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| Cultural and social context (complexity indicator #7) | * Number of languages commonly used in formal project communications (1 - 6+)
* Number of languages commonly used in casual project communications (1 - 6+)
* Number of active locations more than 2 hours apart (1 - 6+)
* Range of time zones with active stakeholders (1 - 10+)
* Number of time zones with active stakeholders (1 - 6+)
* Percent of staff co-located (co-located = in daily contact) (100% - less than 50%)
* Percent of staff assigned full-time (100% - less than 50%)
* Number of distinct cultural groups with more than 20% of staff (1 - 6+)
* Number of distinct cultural groups represented by key stakeholders (1 - 6+)
 |
| Leadership, temwork and decisions (complexity indicator #8) | * Percent of management team that has previously worked for this Project Manager (100% - leass than 50%)
* Average years in current role for members of management team (5+ - less than 1)
* Level of trust within the management team (very high - very low)
* Governance practices (mostwell-defined - few well-defined)
* Skill level of typical non-management team member (very high - very low)
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| Degree of innovation (complexity indicator #9) | * Technical processes (most well-known - most unknown)
* Technical methods (most well-known - most unknown)
* Technical tools (design or delivery) (most well-known - most unknown)
* Point in product life-cycle (maturity - growth - introduction - research)
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| Demand of coordination (complexity indicator #10) | * Amount of autonomy the Project Manager has in coordinating the project (very high - very low)
* Amount of autonomy the Project Manager has in promoting the project (very high - very low)
* Amount of autonomy the Project Manager has in defending the project (very high - very low)
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| Project Control methods and documents used (tick off) | * Project assignment
* Work Breakdown Structure
* Milestone schedule
* Stakeholder management
* Risk and opportunity management
* Resource plan
* Cost and finance plan
* Earned Value report
* Progress report
* Others (list)
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| Description of project challenges | Describe how you have managed project challenges and how you met the complexity criteria. You can use the STAR approach (Situation, Task, Action, Result) in order to structure the report.* Situation/challenge
* Effort to deal with it
* Outcome
* Reference to CEs

You can include the links to the information in complexity criteria form |

Please copy and fill in relevant parts of this report according your needs to cover your experience. Please delete text marked in blue and fill in your own text in relevance to the project. Suggestion texts in blue color are according complexity ratings (very low -> very high).

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**Extracted from ICR4 (**[**http://www.ipma.world/certification/icr/**](http://www.ipma.world/certification/icr/)**):**

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:

* organisation (company details, industry and project types, principal objectives of the organisation 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 organisation 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.