Certified Project Master (CPM)

Assessment Guidelines

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A **Certified Project Master (CPM)** is a project leader and innovator. They have been independently assessed against a broad range of project management competencies, and can apply a suite of specialised technical and managerial skills to initiate, plan, execute and evaluate their own project work and the work of others.

In order to demonstrate your competence as a Project Master, you are required to evidence the following:

- **Knowledge**: Successfully complete and be assessed on 30 hours of project management education
- **Experience**: Demonstrate the full-time equivalent of three (3) years' complex project leadership experience
- **Skills**: Identify a complex public or private project that has recently completed and conduct a comprehensive review of its performance

Step 1: 30 hours' project management education

In order to demonstrate your **knowledge** as a Project Master, you are required to submit evidence with your application that you have successfully completed and been assessed on 30 hours of project management education.

Your evidence must include:

- A detailed description of the training program completed[1]
  - This can take the form of a course brochure or link to a relevant webpage; AND
- An academic transcript / certificate / statement from a project management training provider that clearly states:
  - Your full name
  - The title of the course completed
  - The total hours studied
  - Your assessed grade (for example: pass, competent, distinction)
  - The date of assessment
  - The institutional name of the training provider and their logo

The Institute of Project Management may directly contact your course provider to clarify details of the course and/or confirm your successful completion.

You are **not required** to submit evidence of 30 hours' project management education if you have:

- Been admitted to the Institute of Project Management as a Certified Project Officer (CPO); OR
- Successfully completed in your own name all the online quizzes in OPEN, the Institute of Project Management's open project education network

If you have changed your name since completing this requirement and wish to be admitted under your new name, you must provide legal evidence of your name change (for example: a marriage certificate).

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[1] The course must explicitly educate on an aspect or all of 'project management'. Academic completion of a workplace or industry project and/or general management studies are **not** eligible.

Step 2: Three (3) years' complex project leadership experience

In order to demonstrate your **experience** as a Project Master, you are required to submit evidence with your application that you have the full-time equivalent of three (3) years' complex project leadership experience.

In order to meet the minimum threshold of complexity, the projects you have led must involve:

- A delivery team of three (3) or more people (including the project manager)
- Detailed project documentation at all stages
- Formal governance structure (for example, a sponsor and/or steering committee)
- Multiple stakeholder relationships

Years of experience may be accumulated non-consecutively (for example, over six calendar years).

For each project you list, you must nominate a **referee**.

A referee is an appropriately qualified person not related to you who is willing to testify to your competence. Referees are typically past or present workplace supervisors or managers with line authority over you and your projects.

You must nominate a minimum three different (3) referees. If you only list one project that lasted three years, or if the same referee oversaw all your projects, you must still nominate three referees.

We will interview one of the three referees you nominate with your application, as per the referee interview form appended to this guide.

Step 3: Project Review

In order to demonstrate your competence as a Project Master, you are required to identify a complex public or private project that has recently completed and conduct a comprehensive review of its performance.

To meet the minimum threshold of complexity, the project you review must involve:
- A delivery team of three (3) or more people (including the project manager)
- Detailed project documentation at all stages
- Formal governance structure (for example, a sponsor and/or steering committee)
- Multiple stakeholder relationships

It is an essential requirement of this activity that you are a '**stranger**' to the project. In other words, you cannot have had any of the following, active roles in the project you review:

- Project initiator
- Project sponsor
- Project steering committee or governance group member
- Project manager
- Project team member
- Project contractor or supplier
- Project client

Part 1

The final output will take the form of a hypothetical consultant's report commissioned by the Board of Directors of the performing organisation. The report will be aimed at recommending improvements for the firm's performance of future projects. It is **not** a (product) review of the deliverable created by the project.

In addition to common requirements for business writing, the Review should address the following:

- Project assets, including (but not limited to):
  - o project initiation documentation (for example: a project business case; project charter)
  - o project planning documentation (for example: a project stakeholder register; work breakdown structure; Gantt chart; budget; position descriptions; risk register; communications plan)
  - o project delivery documentation (for example: project status reports; change requests; issues register)
- Project performance, including (but not limited to):
  - o planned versus actual performance to scope, schedule and budget
  - o stakeholder identification and communication
  - o business case development
  - o scope definition and management
  - o schedule development and control
  - o cost estimating and control
  - o risk identification, prioritisation and treatment
  - o human resource availability and performance
  - o quality planning and control
  - o procurement / contract management
  - o project governance and change control
  - o project delivery and handover
  - o other lessons learned

At a minimum, you would be expected to conduct one-on-one interviews with the project manager, project sponsor and a client representative. Other project stakeholders should also be consulted. This can be done using a variety of methods, including interviews, workshops and surveys.

For assessment purposes, the Review is to be at least **2,500 words** in length. The word count does not include the executive summary, headings and titles, footnotes, references and/or appendices. The executive summary must not be more than 10% of the overall word count.

The following documents relevant to the project you have reviewed may also be appended or linked to your report:
- A business case and/or project charter
- A work breakdown structure (WBS), schedule and budget
- Risk and stakeholder registers
- Position descriptions for key project team members
- Status reports / change requests

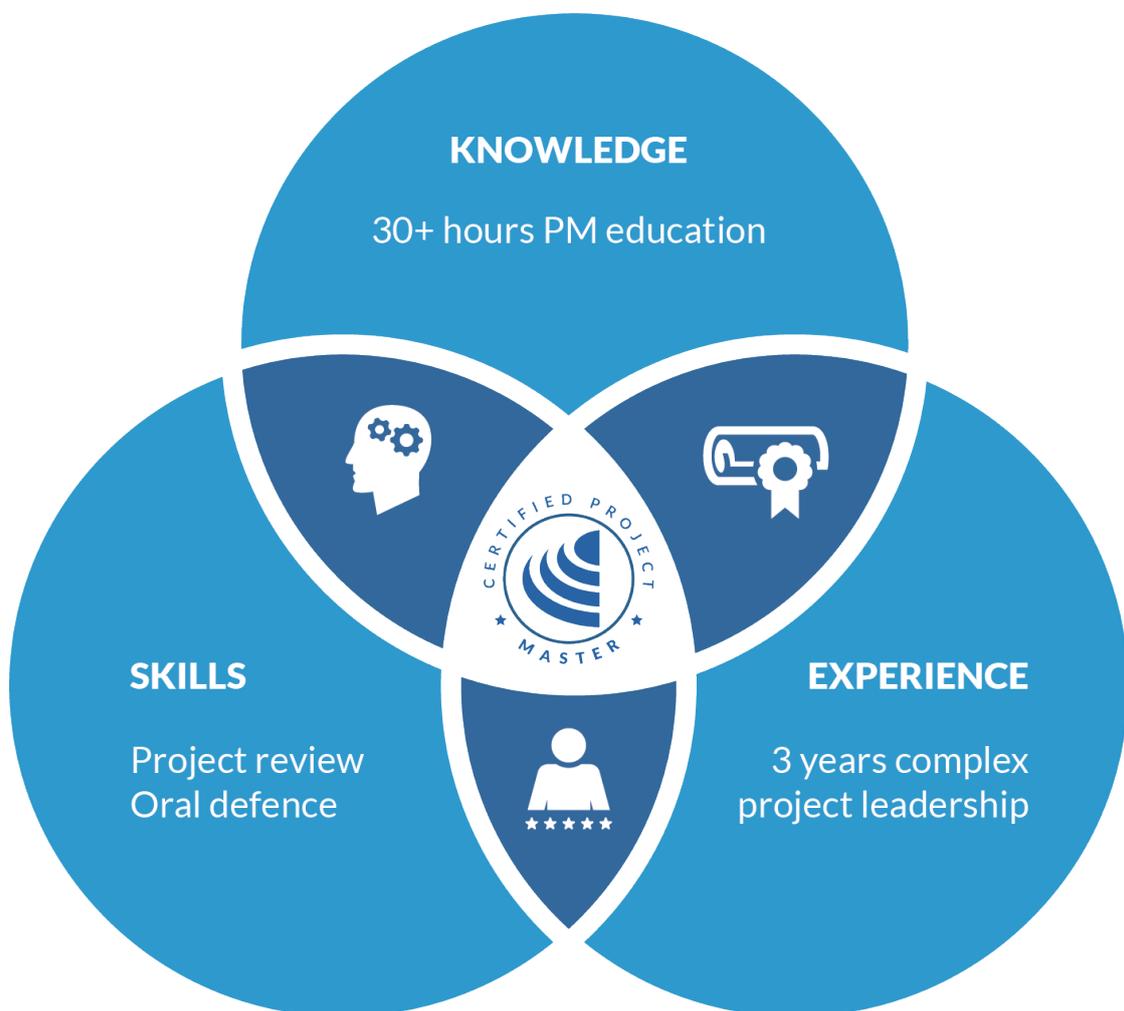You may independently prepare them for examination purposes if they do not already exist.

Once your evidence of knowledge, experience and your written report have been successfully assessed per the criteria in this guide, you will be contacted for your oral defence.

This 30 minute defence simulates a Board level interrogation of your Review conclusions and its recommendations – it is not an oral presentation of your findings (eg PowerPoint).

In order to successfully complete this defence, you will need to be familiar with larger issues, such as project management frameworks, theories and best practice; more importantly, you need to have a deep understanding of the project you have reviewed and the major issues encountered.

Candidates who successfully complete the final interview will be advised immediately and directly admitted to the Institute of Project Management as a Certified Project Master.

KNOWLEDGE

30+ hours PM education

CERTIFIED PROJECT MASTER

SKILLS

Project review
Oral defence

EXPERIENCE

3 years complex project leadership

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Assessment Guide: Project Review

The following guide is intended to show you step-by-step how to complete the Project Review requirement for admission to the Institute of Project Management as a Certified Project Master.

1   **Identify a project**

One commonly expressed concern is that people do not have access to a sufficiently complex project for review, or a project that they are a 'stranger' to. In this instance, we recommend a number of alternatives:

- Talk to your employer – there may be a number of projects suitable for review outside your immediate department. You might also be able to 'swap' a project with a fellow candidate.
- Contact the local chapter of your relevant industry association – for example, if you are a software engineer, you could connect with other software engineers and have them suggest suitable projects for review.
- Consider your social networks – are you a member of a sporting organisation or other community group? Do they have any recently completed projects? They may value your new-found expertise!
- Ask a family member or friend – do they have access to suitable projects within their employer, industry or social networks?
- Chase your dream – is there a public festival or event you've always wanted to be involved in? Is there a new career you'd like to pursue? Use your review as the opportunity to make new contacts and create new networks that might literally be life-changing!

We have found that a surprising number of people out there are receptive to the idea of having their projects externally reviewed for both certification and practical purposes. It is nonetheless important that you present yourself professionally, are fully prepared, and ready to answer any questions they might have about the process.

Therefore when making your introduction, either in person or via a letter, you should be able to fully explain:

- Who you are
- What you are doing
- Why you are doing it
- The benefit to them (both as an individual and an organisation)
- How the review process will work
- What you need from them
- When you need it
- How much it will cost
- How long it will take
- What they can expect at the end of the process

You should also be willing to sign a **non-disclosure agreement (NDA)** to protect any information learned in the course of your review that might be commercially sensitive. As part of your terms and conditions of enrolment, IPM enters into a binding NDA with you (the candidate), however some review sponsors may ask you to sign one directly with them.

As always, please ensure you fully read and understand what you are agreeing to in the NDA. Also ensure that the participating organisation fully understands that your final report will be shared with IPM for assessment purposes only, and that we will treat the data and findings you share with us in the strictest confidence (as per our NDA with you, which is included in the terms and conditions of your enrolment).

As a rule, we do not directly enter into NDAs with your review partners.

2	Prepare a plan

You can and ought to treat your review as a project in its own right. At this point you should:

- Define the terms of reference for your review: if you are using a report template, then your outputs are predefined, but what are your objectives and intended outcomes?
- List the project documents and assets you will need to complete the review
- Identify the key stakeholders and your engagement strategy
- Prepare a baseline review WBS and schedule – is a budget required?
- Consider how you will manage any risks (for example, what if certain documents / stakeholders are unavailable)

Although this plan is not directly assessed, as you are no doubt aware the effort you invest at this point will be repaid many times the further you get into the review itself!

A sample Project Review Plan is available at: https://open.institute.pm/free-project-management-resources/

3   Gather data

There are two (2) stages to data collection; however, they are not necessarily consecutive. The first stage involves gathering and reviewing all the relevant project planning documentation, including (but not necessarily limited to) the baseline and subsequent versions of the project:

- Concept brief
- Business case
- Project charter
- Scope (WBS)
- Schedule
- Budget
- Risk register

- Stakeholder register
- Communications plan
- Procurement plan
- Quality plan
- Human resource plan
- Position descriptions
- Finance plan

You should also review any and all project:

- Status reports
- Meeting agendas & meetings
- Change requests
- Issues logs
- Change logs
- General correspondence

From this data, you will begin to get a sense of what the project did well, and where you may have opportunities to improve the future delivery of like projects. You might also draw important conclusions from the poor recordkeeping within (or even absence of) any or all of these documents.

These first impressions should then inform and guide any stakeholder interviews you wish to conduct (stage two). Interviewing people such as the project manager, sponsor and client can give you new perspectives and insight into how the project performed and opportunities for improvement.

As you are also likely to discover more relevant documents as part of this process, you should continually update you secondary (document) sources and the relationships that exist therein.

4   Analyse & report

Data analysis is the process of converting all the fragments of *information* you have collected into reliable, actionable *intelligence*.

Unfortunately, the amount of data you have likely generated could answer an incredible number of questions – you could spend the rest of your life trying to analyse all of that information! That is why it is important to go back to the original questions that you are trying to answer.

At the highest level, these questions can be found in your Review terms of reference; drilling down they may be included in your pre-defined report template. Beyond that, look at other ideas and themes that have emerged from your data (surprises), and consider them in terms of how they relate to your questions and their potential implications for the performing organisation.

You should always be looking for multiple points of evidence for each of your conclusions, all of which will lead to actionable recommendations – the entire purpose of your Review.

Using the Project Review template

Although you may use any report format, a Project Review template appropriate to this assessment task can be downloaded from https://open.institute.pm/free-project-management-resources/. Ensure the blue guidance text is deleted – it cannot be included in your word count!

Minimum word counts for each section are suggested below; however, they are presented as a **rough guide**, and not intended to be prescriptive. For example, not all the items in *Section 5 – Lessons Learned* may actually reveal lessons to learn! You are encouraged here to use your expert judgment in selecting how much detail to respond with at each criterion.

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> This section is all about critical analysis. For some topics, you might simply acknowledge that there were no major issues or lessons to be learned – for others, you may present several hundred words of analysis. Where you place your emphasis depends on the specific contingencies of the project you are reviewing.

Total words: 2,500

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5   Oral defence

You will be required to make a 30-minute Oral Defence of your Project Review to complete this assessment activity. You will be contacted directly to schedule your defence once your written report has been assessed.

This Defence simulates a Board level interrogation of your Review conclusions and its recommendations – it is not an oral presentation of your findings (eg PowerPoint). You need to be familiar with larger issues, such as the project management frameworks, theories and best practice; more importantly, you need to have a deep understanding of the project you have reviewed and the major issues encountered.

As most defences are conducted via Skype, you should have with you important materials for easy reference in the course of your defence; these may include key project documents, stakeholder interview notes, and the like.

As you will see from the assessment criteria (below), your defence is evaluated in terms of content and clarity, as well as style. Don't speak too fast and don't read from notes. Be prepared to clarify or elaborate on your assumptions, theoretical positions, methods, and conclusions. Often an examiner plays the devil's advocate to see how well you can think on your feet and defend yourself.

Don't rush your answers. It is perfectly acceptable to think for a couple of seconds, or ask if you are on the right track. If you are not clear about the question you are entitled to ask for clarification.

Try to be concise and to the point, but at the same time demonstrate that you have a good grasp of the complex issues involved. In other words, do not give superficial answers, but at the same time, do not try and present an entire PhD-level theory of project management in each response.

Importantly, you should put up a good defence without being defensive. A good defence means that you can provide strong logical arguments and empirically support or defend your position or recommendations. However, don't become hostile if the examiner is critical of your work.

If they are able to point out some real flaws or weaknesses in your review, accept their criticisms with humility, and indicate how you might learn from this for the future.

Note that this is an essential real-world skill and may be directly assessed!

Assessment

Assessment Integrity

Academic misconduct includes cheating, plagiarism, allowing another candidate to copy work for an assignment or an examination, and any other conduct by which a candidate:

- seeks to gain, for themselves or for any other person, any academic advantage or advancement to which they or that other person are not entitled, or
- improperly disadvantages any other candidate.

Plagiarism is a form of cheating. It is taking and using someone else's thoughts, writings or inventions and representing them as your own, for example:

- using an author's words without putting them in quotation marks and acknowledging the source
- using an author's ideas without proper acknowledgment, or
- copying another candidate's work.

All your assessable works may be submitted to the plagiarism checking service *TurnItIn* to obtain a report on possible instances of plagiarism. Assessable works may also be included in a reference database.

Candidates engaging in any form of academic misconduct may be subject to the imposition of penalties that range from a deduction/ cancellation of marks to exclusion from the course.

Assessment Rubrics

A rubric for assessment, usually in the form of a matrix or grid, is a tool used to interpret and grade candidates' work against criteria and standards. Rubrics are sometimes called "criteria sheets", "grading schemes", or "scoring guides". A rubric makes explicit a range of assessment criteria and expected performance standards. Assessors evaluate a candidate's performance against all of these, rather than assigning a single subjective score. A rubric is intended to:

- make candidates aware of all expectations related to the assessment task, and helps them evaluate their own work as it progresses, and
- help teachers apply consistent standards when assessing qualitative tasks, and promotes consistency in shared marking.

The following rubrics are applied in assessing your Project Review and interview.

In order to achieve this Certification, you need to be assessed as proficient (at a minimum) in **ALL** the listed criteria. Note that proficiency is generally considered to be a higher standard than a 50% passing grade.

Written report	Mastered	Advanced	Proficient	Developing	Basic
Report methodology	A wide variety of sources consulted. All key project documents appended and referenced throughout.	A good range of source material consulted. Some key project documents appended and referenced.	Information taken from source(s) appears sufficient to support a comprehensive analysis.	Inconsistent and or insufficient data on which the report appears to be based.	Little or no evidence for findings.
Lessons learned	Uses experience and information to generate a variety of high-quality lessons for him/herself and the performing organisation.	Views and reframes problems or issues from multiple perspectives to better identify lessons learned.	Identifies a range of lessons accurately using standard processes, techniques and tools.	Supports diagnosis and opinions with few reasons and little evidence; argument is one-sided and not objective.	Fails to adequately identify and/or respond to potential lessons.
Recommendations and action plan	Frames solutions and recommendations that are both nuanced and actionable, while remaining sensitive to a variety of contextual factors.	Decisively chooses the most effective, actionable solutions after evaluating available responses to the issues.	Makes actionable recommendations that are clearly linked to a critical analysis of the findings.	Investigates and identifies a limited range of possible solutions for effectively addressing issues.	Insufficient, invalid or irrelevant recommendations.
Written presentation	The report is exceptionally well organised and a pleasure to read. It goes beyond words to present data in a variety of creative and intelligent formats.	The report is organised logically, professionally formatted and easy to read. There is good use of layout and design to highlight key points.	The report is organised logically and formatted specifically for its purpose. The writing is articulate and the tone is appropriate and consistent.	The report is not organised logically and/or formatted as a report. The writing is understandable, but prone to error.	The report is neither organised logically nor formatted as a report. The tone and accuracy of language used in the writing is not appropriate or understandable.

Interview	Mastered	Advanced	Proficient	Developing	Basic
Communication	Enthusiastically speaks to the report and beyond by providing clear and insightful answers to questions; discussion was superior, accurate, and engaging.	Competently speaks to the report and beyond by providing clear and insightful answers to questions.	Adequately expands upon findings by providing appropriate answers to questions.	Answers questions, but often with little insight; frequently shows a need for deeper reflection on certain points.	Does not adequately address findings; does not answer key questions; displayed poor grasp of material.
Application of project management knowledge	Connects complex concepts, theory and evidence from best-practice to the issues under examination.	Applies the critical elements of a project methodology or framework to inform discussion.	Demonstrates understanding of key project management concepts and principles.	Misapplies project management principles and best-practice in a way that noticeably detracts from the discussion.	Limited understanding of the relevant issues.
Professionalism	Thoroughly professional and engaging in all correspondence throughout the application process, including the interview itself, demonstrating initiative when appropriate.	Thoroughly professional and engaging in all correspondence throughout the application process, including the interview itself.	Professional in manner and appearance throughout the interview.	Occasionally casual in manner and appearance and/or overfamiliar during the interview process.	Failed to meet the standards of professionalism expected of a Certified Project Master.