



Certified Project Professional (CPP)

Assessment Guidelines





A **Certified Project Professional (CPP)** applies contemporary project management tools, techniques and methods to the unique context of each project they undertake. They identify and respond proactively to project risks, opportunities and issues, keeping stakeholders fully informed throughout.

In order to demonstrate your competence as a Project Professional, 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' project experience
- 🌀 **Skills:** Identify a project you have recently made a significant contribution to and critically reflect upon its performance

Step 1: 30 hours' project management education

In order to demonstrate your **knowledge** as a Project Professional, 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 completed¹
 - 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).

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' project experience

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

You may have contributed to your project(s) at any level – as an administrator, team member or manager – and 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 Reflection

In order to demonstrate your **skill** as a Project Professional, you are required to identify a project you have recently made a significant contribution to and critically reflect upon its performance.

Part 1

The final output will take the form of a written report aimed at recommending improvements for the performance of future projects. The recommendations are primarily intended for organisation that delivered the project. The reflection should **not** be a (product) review of the deliverable created by the project.

In addition to common requirements for business writing, the Reflection should include the following major elements:

- ☰ An overview of the project
- ☰ Critical analysis of:
 - Project initiation
 - Project planning
 - Project delivery
 - Project close
- ☰ A conclusion that is linked to your previous discussion
- ☰ Clearly articulated and supported (SMART) recommendations

For assessment purposes, the Reflection must be **at least 1,000 words** in length. The word count does not include headings and titles, footnotes, references and/or appendices.

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.

Part 2

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 final interview.

In that interview (usually via Skype), your assessor will invite you to make a **3-5 minute presentation** of your Project Reflection findings. This will be followed by a **15 minute question and answer session**.

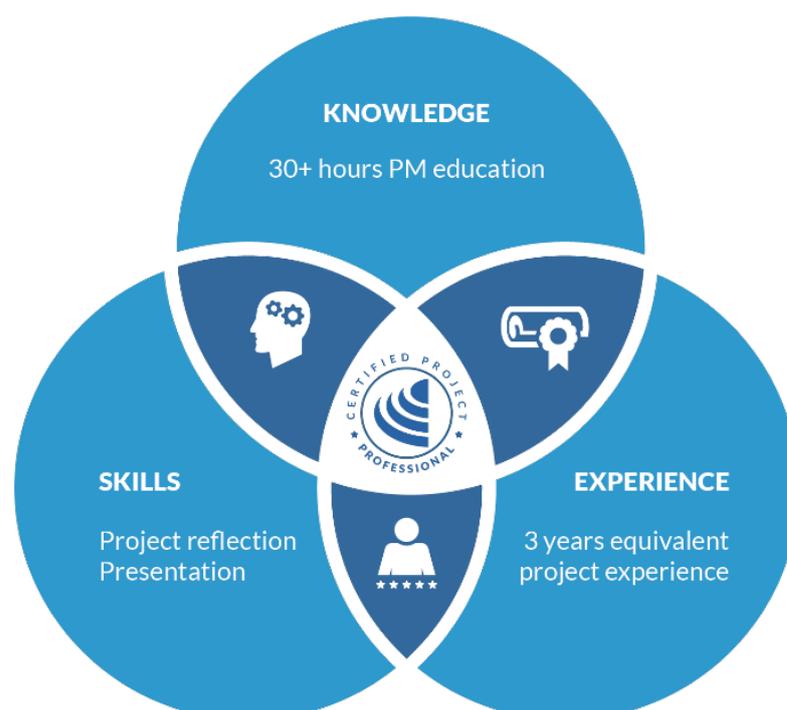
In order to successfully complete this final interview, you will need to be familiar with larger issues, such as project management frameworks, theories and best practice; more importantly, you need to have a deep understanding of the project you have reflected upon and the major issues encountered.

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

Order of Merit

The Order of Merit for Certified Project Professionals recognises excellence in the discipline of project management. Those exceptional students assessed with an overall ranking of Mastered for their written report and interview (with no more than one criteria assessed per instrument as being in the Advanced band) will be entered into the Institute of Project Management’s Order of Merit for Certified Project Professionals.

Order of Merit (CPP) recommendations made by an assessor must be signed off by the Executive of the Institute of Project Management, and may take up to four weeks to be ratified.



Assessment Guide: Project Reflection

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

1

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 your secondary (document) sources and the relationships that exist therein.

2

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 Reflection 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 Reflection.

Using the Project Reflection template

Although you may use any report format, a Project Reflection template appropriate to this assessment task can be downloaded from <https://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.

1 PROJECT OVERVIEW

- 1.1 Project description 25 words
- 1.2 Intended outcomes 25 words
- 1.3 Strategic objectives 25 words

2 METHODOLOGY

- 2.1 Primary sources..... 25 words
- 2.2 Secondary sources 25 words

3 PROJECT PERFORMANCE

- 3.1 Performance against baseline plans 100 words
- 2.2 Outcomes delivered 25 words
- 2.3 Outcomes yet to be realised 25 words
- 2.4 Changes 50 words

3	OPEN ACTIONS	25 words
4	LESSONS LEARNED	400 words
4.1	Stakeholder identification and communication	
4.2	Business case development	
4.3	Scope definition and management	
4.4	Schedule development and control	
4.5	Cost estimating and control	
4.6	Risk identification, prioritisation and treatment	
4.7	Human resource availability and performance	
4.8	Quality planning and control	
4.9	Procurement / contract management	
4.10	Project governance and change control	
4.11	Project delivery and handover	
4.12	Other lessons learned	
5	PROJECT MANAGEMENT TEMPLATES, TOOLS AND ASSETS	50 words
6	RECOMMENDATIONS / ACTION PLAN	200 words

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 reflecting upon.

Total words: 1,000

7	APPENDICES	<i>Optional - not included in word count</i>
7.1	Business case and/or project charter	
7.2	WBS, schedule and budget	
7.3	Risk and stakeholder registers	
7.4	Position descriptions	
7.5	Status reports / change requests	



3

Interview

You will then be required to make a **3-5 minute presentation** of your Project Reflection findings, followed by a **15 minute question and answer session** to complete this assessment activity. You will be contacted directly to schedule your interview once your written report has been assessed.

In order to successfully complete this part, 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 reflected upon and the major issues encountered.

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

As you will see from the assessment criteria (below), your interview is evaluated in terms of content and clarity, as well as style. Don't speak too fast and don't overly rely on 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 justify yourself.

During the interview, 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 of your findings 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 reflection, 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 Reflection 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.



Project reflection

Candidate name:

Submitted date:

Assessor name:

Assessment date:

Project review result

- The Reflection report is at least 1,000 words in length (not including headings and titles, footnotes, references and/or appendices); **AND**
- The candidate has successfully completed the Reflection report to the required standard; **OR**
- The candidate has not yet met the required standard for their project reflection; **AND**
- The candidate has been provided with feedback and informed of the assessment result and the reasons for the decision.

General comments / feedback

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Assessor signature:

Date:

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.



Referee validation

Candidate name:.....

Referee name:.....

Referee job title:

Assessor name:

Interview date:.....

Introduction	
My name is <your name> and I'm calling to conduct a referee validation for <name of applicant> who is being considered for admission to the Institute of Project Management as a Certified Project Professional. Your details have been provided to me by <applicant's name> and I would first like to check if you are prepared to provide a reference?	Yes No
The reference check will take approximately 10 minutes to complete. Is this a good time for you? If not, when is a convenient time for us to continue this conversation?	Call back Proceed
Please note that this reference will be used in the overall evaluation of the applicant and will affect whether they are admitted as a CPP. The information you provide may be given to the candidate if requested, and this call may also be recorded. Do I have your permission to proceed?	Yes No
<p>Let me tell you a bit more about the standard the candidate is being assessed against.</p> <p>A Certified Project Professional (CPP) applies contemporary project management tools, techniques and methods to the unique context of each project they undertake.</p> <p>They identify and respond proactively to project risks, opportunities and issues, keeping stakeholders fully informed throughout.</p> <p>To get this far, <applicant's name> has been assessed on over 30 hours of project management knowledge, and submitted a detailed reflection on the performance of a project they have contributed to.</p> <p>Our conversation now is part of the final stage in the assessment, and serves as third party validation of the candidate's ability to act as a project professional.</p> <p>Are you happy to go continue?</p>	

General questions	
What is the nature of your relationship with <applicant's name>?	<Disqualify & end interview if the referee is a close relative>
What projects have you observed <applicant's name> working on?	
What were the dates of this engagement?	From: _____ To: _____
What duties and responsibilities does/did <applicant's name> have?	
How would you describe <applicant's name> overall contribution to the project?	
What would you say are <applicant's name> strengths?	
What would you say are <applicant's name> opportunities for development?	
How would you describe <applicant's name> professionalism?	
In closing	
Would you (re-)employ <applicant's name> to manage simple projects? Why/why not?	
Do you have any final comments?	
Thank you for taking the time to provide this feedback. If you wish to provide any further information, you can contact me on <your contact details>.	

Referee validation result

- The candidate has successfully passed the referee validation; **OR**
- The candidate has not yet met the required standard; **AND**
- An alternate referee will now be contacted; **OR**
- The candidate has been provided with feedback and informed of the assessment result and the reasons for the decision.

Assessor signature:

Date:.....



Interview

Your interview will be recorded to help us continually improve how we assess candidates

Candidate name:

Submitted date:

Assessor name:

Assessment date:

Interview result

- The candidate has successfully completed an interview on their Reflection to the required standard; **AND**
- The candidate is to be admitted to the Institute of Management as a Certified Project Professional (CPP); **AND/OR**
- The candidate is recommended to the Institute for entry into the Order of Merit for Certified Project Professionals; **OR**
- The candidate has not yet met the required standard for their interview; **AND**
- The candidate has been provided with feedback and informed of the assessment result and the reasons for the decision.

General comments / feedback

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Assessor signature:

Date:



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 Professional.

Order of Merit

Those exceptional students assessed with an overall ranking of Mastered for their written report and interview (with no more than one criteria assessed per instrument as being in the Advanced band) will be entered into the Institute of Project Management’s Order of Merit for Certified Project Professionals.