



IPMA<sup>®</sup>  
international  
project  
management  
association

# IPMA<sup>®</sup> ICRCCT

International Certification Regulations  
for Consultants, Coaches and Trainers

ICRCCT Public | version 1.0

IPMA<sup>®</sup>

Owner and author of the document

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## Contents

Chapter 1. Scope	<b>7</b>
Chapter 2. Terms, Definitions and Abbreviations	<b>8</b>
Chapter 3. Certification Scheme	<b>10</b>
Chapter 4. Certification Process Requirements	<b>14</b>
Chapter 5. Re-certification	<b>27</b>
Chapter 6. Complaints and Appeals	<b>30</b>

## Foreword

This document is the IPMA International Certification Regulations for Consultants, Coaches and Trainers (IPMA ICRCT) version 1.0 and supersedes all previous certification regulations regarding certification of project management consultants – PMC and programme and portfolio consultants – PPMC described in the Addition to the IPMA® Certification Regulations and Guidelines for PM Consultants (ICRGC). The ICRCT is an extension of the IPMA International Certification Regulations (IPMA ICR).

These regulations contribute to IPMA's vision of promoting competence throughout society to enable a world in which all projects succeed.

The development was entrusted to the Certification Validation Management Board (CVMB) of IPMA and was prepared by subject matter experts using the structure and intent of IPMA ICR as its basis. This document was made possible through cooperation and contributions from Member Associations (MAs) and Certification Bodies (CBs).

The IPMA ICRCT has been approved by the Council of Delegates (CoD) for use by all IPMA MAs and CBs on September 2019. While the regulations exist in one official version in English, a version in any other language made by direct translation may be used locally within the CB.

Amendments to ICRCT will be developed within IPMA based on continuous improvement. The change process will be managed by the IPMA CVMB as the designated product owner. Any clarifications shall be issued by the IPMA CVMB without the need for further approval.

My thanks go to all contributors representing different countries and industries who have dedicated their valuable time and effort to the revised version. In addition, my thanks go to the IPMA CoD, IPMA Executive Board and VP Certification for their support and for their creation of the conditions needed to realise this new document.

**Allan Krüger-Jensen**  
CVMB Chair on behalf of the IPMA CVMB

# Executive Summary

The International Project Management Association (IPMA®), as a leader of project management competence based certification, provides the IPMA Four-Level-Certification (IPMA 4-L-C) System for project, programme and portfolio management personnel. The IPMA 4-L-C System is managed by IPMA through the CVMB. The 4-L-C System, and the IPMA Certification Regulations that support the certification system, are applied within each participating MA by the corresponding IPMA CB.

To provide the competence development of consultants, coaches and trainers working in project management, IPMA® decided to enrich the 4-L-C System by a Three-Level Certification for consultants and coaches as well as for trainers who work in the field of project management and contribute to the development of personnel and organisations. The IPMA certification regulations for consultants, coaches and trainers are based on the IPMA CCT Baseline and IPMA ICRCT.

The professionals conducting consultancy, coaching, educating or training activities in the field of project management, need to have a specified framework to assess and certify their professional competences: these include IPMA ICB®4 and ICB4CCT competence elements. The ICRCT can be applied to different specialists who fulfil the roles of consultant and coach or trainer.

## **A person fulfilling the role of a Consultant and/or Coach could be:**

- » a consultant and / or coach in the company / organization,
- » a freelance consultant and / or coach,
- » a consultant and / or coach in a consulting/training company that provides project management consultancy and / or coaching services to clients,
- » an educator in the academic field who delivers project management courses for students,
- » a consultant and / or coach who prepares candidates for IPMA certification.

## **A person fulfilling the role of a Trainer could be:**

- » an internal trainer in the company /organization,
- » a freelance trainer,

- » a trainer in a training/consulting company that provides project management trainings for clients,
- » a lecturer in an academic field who delivers project management courses with practical training elements (seminars and workshops),
- » a trainer who prepares candidates for IPMA certification.

By practicing their consultancy, coaching and training competences, IPMA certificate holders can strengthen and develop their customers' organisations to obtain better results and achieve the agreed goals and objectives on the level of individuals, projects, programmes, portfolios or organisations. As experts, they: share their expertise; provide coaching and consulting services; and deliver training and education programmes for project management personnel and organisations.

IPMA's view of the roles is as follows: a trainer is a person who shares knowledge while a consultant and coach give advice to individuals in the project management field. Therefore, IPMA defines two roles for certification purposes:

- » Consultant and Coach in project management (CC)
- » Trainer in project management (T)

## **IPMA defines a three-level system for certification of Consultants and Coaches; and Trainers (CCT):**

- » **IPMA® Level A:**  
Certified Executive Consultant and Coach in project management (CECC)
- » **IPMA® Level A:**  
Certified Executive Trainer in project management (CET)
- » **IPMA® Level B:**  
Certified Senior Consultant and Coach in project management (CSCC)
- » **IPMA® Level B:**  
Certified Senior Trainer in project management (CST)
- » **IPMA® Level C:**  
Certified Consultant and Coach in project management (CCC)
- » **IPMA® Level C:**  
Certified Trainer in project management (CT)

**For CCT certification purposes the following principles are used:**

- » The Consultant and Coach certificate addresses consulting and coaching activities, giving and implementing advice in the project, programme or portfolio environment.
- » The Trainer certificate addresses designing curriculum, developing and delivering training programmes in the project, programme or portfolio environment.
- » These certificates are competence based. The core competences as well as specific competencies for consultants, coaches and trainers are described in IPMA ICB4 and ICB4CCT.
- » Eligibility criteria, functional areas and the responsibilities expected from the CCT roles are identified at each of the three IPMA® Levels of competence.

Re-certification is required after five years and is based on evidence of the continuing involvement in project management consulting, coaching and training as well as evidence of corresponding continuing professional development.

# Chapter 1. Scope

## 1.1. IPMA documentation overview

- 1.1.1 The IPMA International Certification Regulations for Consultants, Coaches and Trainers (IPMA® ICRCT) provide a consistent and globally recognised framework for the assessment and recognition of competence in consulting, coaching and training in the field of project management.
- 1.1.2 The IPMA Individual Competence Baseline for Consulting, Coaching and Training (IPMA® ICB4CCT) is the

basis of assessment for the IPMA System. Using the IPMA ICB4CCT as a baseline, the IPMA ICRCT has been developed with the primary aim of ensuring a process that is harmonised, universal in its interpretation and reliable for certification purposes. Together, they form a benchmark for the competence that should be expected of professionals who consult, coach, train and educate people in the domains of Projects, Programmes and Portfolios as well as project management activities.



Figure 1. Related IPMA ICRCT documentation

## Chapter 2. Terms, Definitions and Abbreviations

### 2.1. Terms and definitions

2.1.1. For the purposes of the IPMA ICRCT, the terms and definitions defined in IPMA ICR4 are used. In addition to them, the following terms for CCT are defined in the table below:

TERMS	DEFINITIONS
Certificate holder	Person who has attained the required level of competence to be granted a certificate.
Geographical area	A country bounded by national borders.
Individual competence	The application of knowledge, skills and abilities in order to achieve the desired results.
Consultant in project management	Person who participates in consulting project or activities, leads consultancy assignments on projects and/or programmes and/or portfolios and/or is performing PM consultancy at the organization / strategic level.
Coach in project management	Person who works with either one person or a group of people using the questioning techniques and other coaching models that lead to finding appropriate solutions to actual challenges and thus inspire greater confidence in delivering successful results in projects, programmes and portfolios.
Project management	In this document, the project management profession includes project, programme and portfolio management and other project – oriented activities.
Trainer in project management	Person who delivers knowledge and expertise to the audience in the field of projects, programmes and portfolios for them to achieve better results in the future.

Table 1. Terms and definitions

### 2.2. Abbreviations

2.2.1 For the purposes of the IPMA ICRCT, the abbreviations defined in IPMA ICR4 are used. In addition to them, the following abbreviations specifically for CCT are defined in the table below:

ABBREVIATION	FULL TERM
CC in PM	Consultant and Coach in project management
ICB4CCT	IPMA Competence Baseline. Reference Guide for Consultants, Coaches and Trainers.
ICR4-Public	IPMA Competence Baseline Regulations – public version
IPMA ICRCT	IPMA International Certification Regulations for Consultants, Coaches and Trainers. Extension to the IPMA ICR.



PM	Project management profession including project, programme and portfolio management and other project – oriented activities.
QMS	Quality Management System
T in PM	Trainer in project management
CECC	Certified Executive Consultant and Coach in project management
CET	Certified Executive Trainer in project management
CSCC	Certified Senior Consultant and Coach in project management
CST	Certified Senior Trainer in project management
CCC	Certified Consultant and Coach in project management
CT	Certified Trainer in project management

Table 2. Abbreviations

## Chapter 3. Certification Scheme

### 3.1. IPMA 4-L-C System

3.1.1 The CB's Certification Scheme shall comply with the regulations specified in the IPMA ICR4-Public, Chapter 2, about:

- » IPMA principles of certification
- » Limitations of CB certification
- » Setting the Assessment
- » Language of the assessment
- » Accessibility of certification
- » Arrangements for Reasonable Adjustments

3.1.2 For the purpose of certification of CC and T, IPMA shall set the international specification for certification as the owner of the 4-L-C System:

- » roles – CC and T;
- » both roles – CC and T – can be certified at the 3 levels – A, B and C; level D is not relevant for CC and T as the individuals in both CC and T roles must have experience and practice consulting, coaching or training;
- » CC and T certification applies across the domains of Project, Programme and Portfolio Management as well as other project management activities: there are no separate CC and T certificates for each domain.

3.1.3 The international specification shall identify:

- » the required components of the certification process for each level and role of certification including Candidate eligibility criteria;
- » which combination of Competence Elements from IPMA ICB4 and ICB4CCT is required to be assessed for each level;
- » which assessment methods shall be used by the CB for each level and role;

- » the extent and nature of evidence required from Candidates to achieve certification; and
- » the threshold values for certification to be achieved.

### 3.2. IPMA 4-L-C level definitions for Consultants and Coaches; and Trainers roles

3.2.1 There are 3 levels in the IPMA 4-L-C System – Levels A, B, C – developed for CC and T roles. The IPMA level definitions for certification of CC and T are constructed against the following core criteria:

- » Level A is constructed in terms of the delivery and /or leadership of teams of others in consulting, coaching or training assignments in projects, programmes or portfolio management with strategic impact on the individuals', teams' or organisations' professional development. Level A applies for Executive Consultant and Coach; and Executive Trainer roles.
- » Level B is constructed in terms of the delivery and / or leadership of a team of others in consulting, coaching or training assignments in projects, programmes or portfolio management. Level B applies for Senior Consultant and Coach; and Senior Trainer roles.
- » Level C is constructed in terms of the delivery of consulting, coaching or training assignments in projects, programmes or portfolio management through the application of knowledge/theory across all relevant competences. Level C applies for Consultant and Coach; and Trainer roles.
- » Level D is not applicable for consultants, coaches and trainers.

3.2.2 CC and T can deliver the consulting, coaching and training services in the face to face mode and / or remote, interactive mode. The three levels and two roles create 6 profiles in the CCT certification system as shown below:

ROLE			
Consultant and Coach		Trainer	
Level	A	Certified Executive Consultant and Coach	Certified Executive Trainer
	B	Certified Senior Consultant and Coach	Certified Senior Trainer
	C	Certified Consultant and Coach	Certified Trainer

Table 3. IPMA CC and T profiles

3.2.3 Each role profile has associated role descriptions and eligibility criteria as shown in the table below:

IPMA LEVEL A		
All experience for Level A must have been obtained within the last 8 years		
Domains	Role Description	Eligibility
Project Management, Programme Management, Portfolio Management	<b>Certified Executive Consultant and Coach in project management</b>	
	» Acts as Consultant and / or Coach with profound C/C subject matter expertise for individuals and groups of individuals in project management.	Within the last 8 years, the Candidate shall have:
	» Responsible for leading the development and delivery of consultancy or coaching services that have strategic impact on the individuals', teams' or organisations' professional development.	Minimum 5 years' experience with 1500 working hours as a lead consultant or lead coach in project management consulting or coaching activities with <b>strategic</b> impact on the individuals', teams' or organisations' professional development.
	» Fulfils the function of lead consultant or lead coach, team lead consultant or team lead coach with a strategic impact on the individuals, teams or organisations professional development and alike.	

<b>Certified Executive Trainer in project management</b>		
Project Management, Programme Management, Portfolio Management	» Acts as a Trainer with profound subject matter expertise for individuals and / or groups of individuals in project management.	Within the last 8 years, the Candidate shall have:
	» Responsible for leading the development and delivery of training programmes, workshops, lectures or seminars with practical training elements that have a strategic impact on the individuals', teams' or organisations' professional development.	Minimum 5 years' experience with minimum 1500 working hours as a lead trainer in project management training activities with a strategic impact on the individuals, teams or organisations professional development.
	» Fulfils the function of lead trainer or training team leader in teams with other trainers with a strategic impact on the individuals', teams' or organisations' professional development and alike.	

## IPMA LEVEL B

All experience for Level B must have been obtained within the last 5 years

Domains	Role Description	Eligibility
<b>Certified Senior Consultant and Coach in project management</b>		
Project Management, Programme Management, Portfolio Management	» Acts as Consultant and / or Coach with deep C/C subject matter expertise for individuals and groups of individuals in project management.	Within the last 5 years, the Candidate shall have:
	» Responsible for developing and delivering consultancy or coaching services on individual, team or organisational level.	Minimum of 3 years' experience with minimum total 1000 working hours as consultant or coach in project management consulting or coaching activities.
	» Fulfils the function of consultant or coach, team lead consultant or coach in a team with other consultants, coaches and / or trainers and alike.	
<b>Certified Senior Trainer in project management</b>		
Project Management, Programme Management, Portfolio Management	» Acts as a Trainer with deep subject matter expertise for individuals and / or groups of individuals in project management.	Within the last 5 years, the Candidate shall have:
	» Responsible for developing and delivering training programmes, workshops, lectures or seminars with practical training elements.	Minimum 3 years' experience with minimum 1000 total working hours as a trainer or lead trainer in a team in project management training activities
	» Fulfils the function of trainer or lead trainer in a team with other trainers and alike.	

IPMA LEVEL C		
All experience for Level C must have been obtained within the last 3 years.		
Domains	Role Description	Eligibility
Project Management, Programme Management, Portfolio Management	<b>Certified Consultant and Coach in project management</b> <ul style="list-style-type: none"> <li>» Acts as Consultant and / or Coach with moderate subject matter expertise for individuals and groups of individuals in project management.</li> <li>» Responsible for delivery or support of delivery of consultancy or coaching services on individual, team or organisational level.</li> <li>» Fulfils the function of consultant or coach, junior consultant or coach, probationary consultant or coach, co-consultant or co-coach and alike with limited or moderate responsibilities.</li> </ul>	
	<b>Certified Trainer in project management</b> <ul style="list-style-type: none"> <li>» Acts as a Trainer with moderate subject matter expertise for individuals and / or groups of individuals in project management.</li> <li>» Responsible for delivery or support of delivery of training programmes, workshops, lectures or seminars with practical training elements.</li> <li>» Fulfils the function of trainer, co-trainer, probationary trainer and alike.</li> </ul>	Within the last 3 years, the Candidate shall have: minimum 6 months with minimum 500 working hours in project management training activities.

Table 4. IPMA 4-L-C System eligibility criteria for Consultant and Coach; and Trainer

### 3.3. Complexity of projects, programmes and portfolios

Whilst understanding the complexity of projects, programmes and portfolios is important to CC and T roles, the complexity section of ICR4 is not applicable to the certification of CC and T roles.

## Chapter 4. Certification Process Requirements

### 4.1. Assessment paths for initial certification

4.1.1 The CB's Assessments shall comply with the regulations specified in the IPMA ICR4-Public, Chapter 3, about:

- » Assessment requirements
- » Sufficiency of evidence

### 4.2. Assessment paths by level:

4.2.1 The assessment paths for each level and role are defined and shall be applied by the CB as stated below.

There are assessment paths for each level of the certification of IPMA Consultants and Coaches and IPMA Trainers.

» **IPMA® Level A:**

Certified Executive Consultant and Coach in project management (CECC)

» **IPMA® Level A:**

Certified Executive Trainer in project management (CET)

» **IPMA® Level B:**

Certified Senior Consultant and Coach in project management (CSCC)

» **IPMA® Level B:**

Certified Senior Trainer in project management (CST)

» **IPMA® Level C:**

Certified Consultant and Coach in project management (CCC)

» **IPMA® Level C:**

Certified Trainer in project management (CT)

Assessment paths for **IPMA® Level A** – Certified Executive Consultant and Coach  
and Certified Executive Trainer are shown at the figures below.

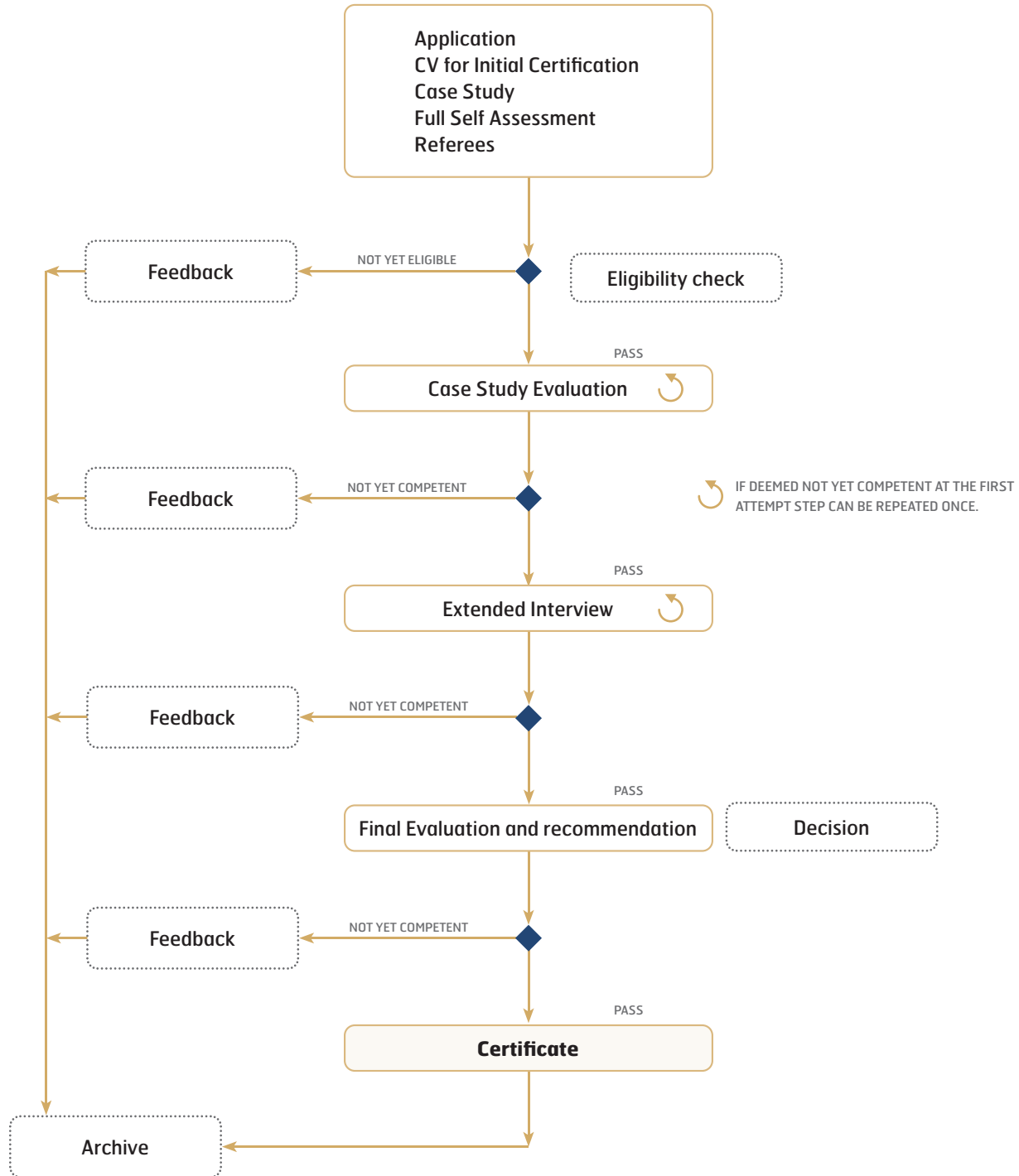


Figure 2. Assessment Path for IPMA® Level A Certified Executive Consultant and Coach

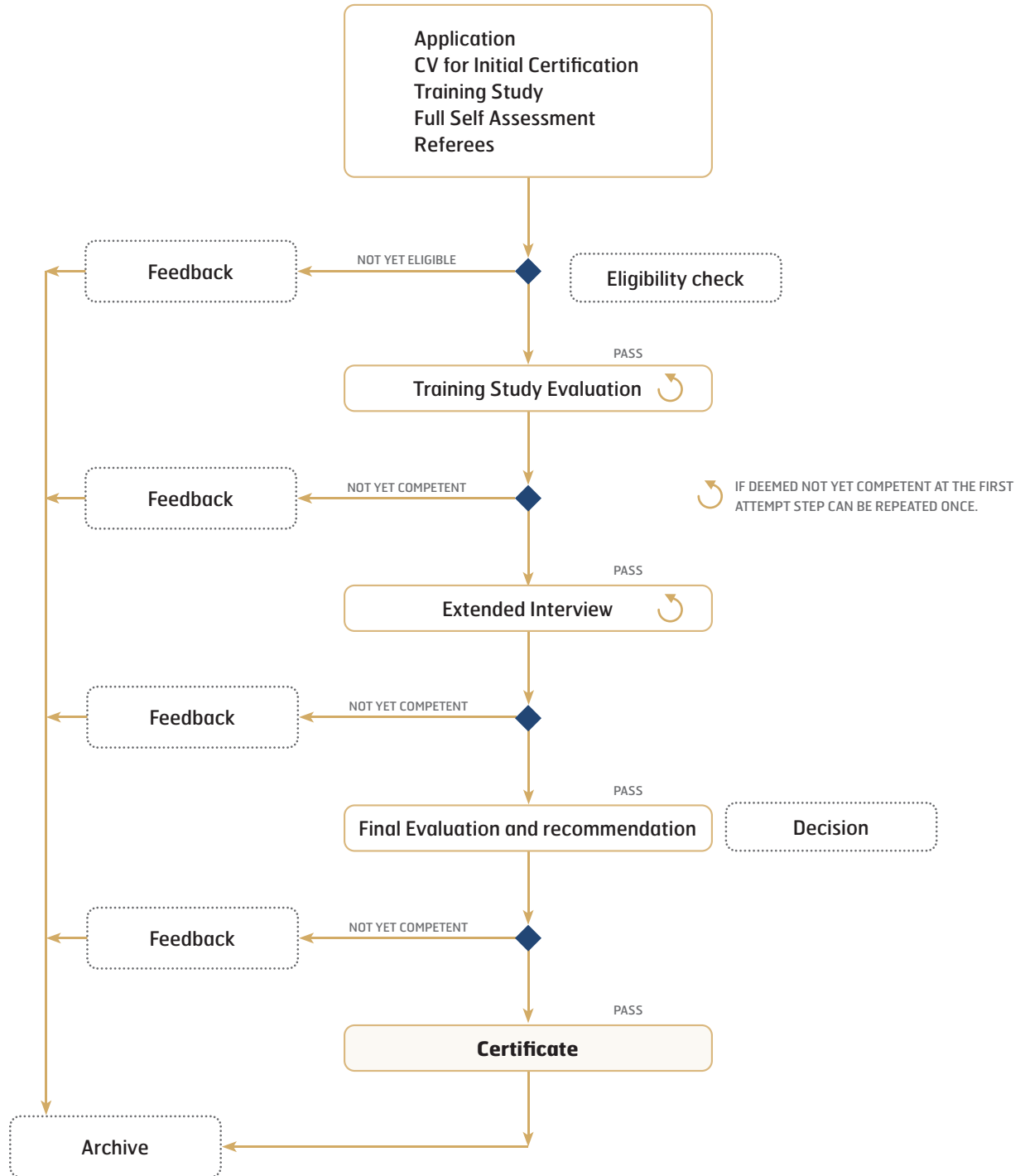


Figure 3. Assessment Path for IPMA® Level A Certified Executive Trainer



Assessment paths for **IPMA® Level B** – Certified Senior Consultant and Coach  
and Certified Senior Trainer are shown at the figures below.

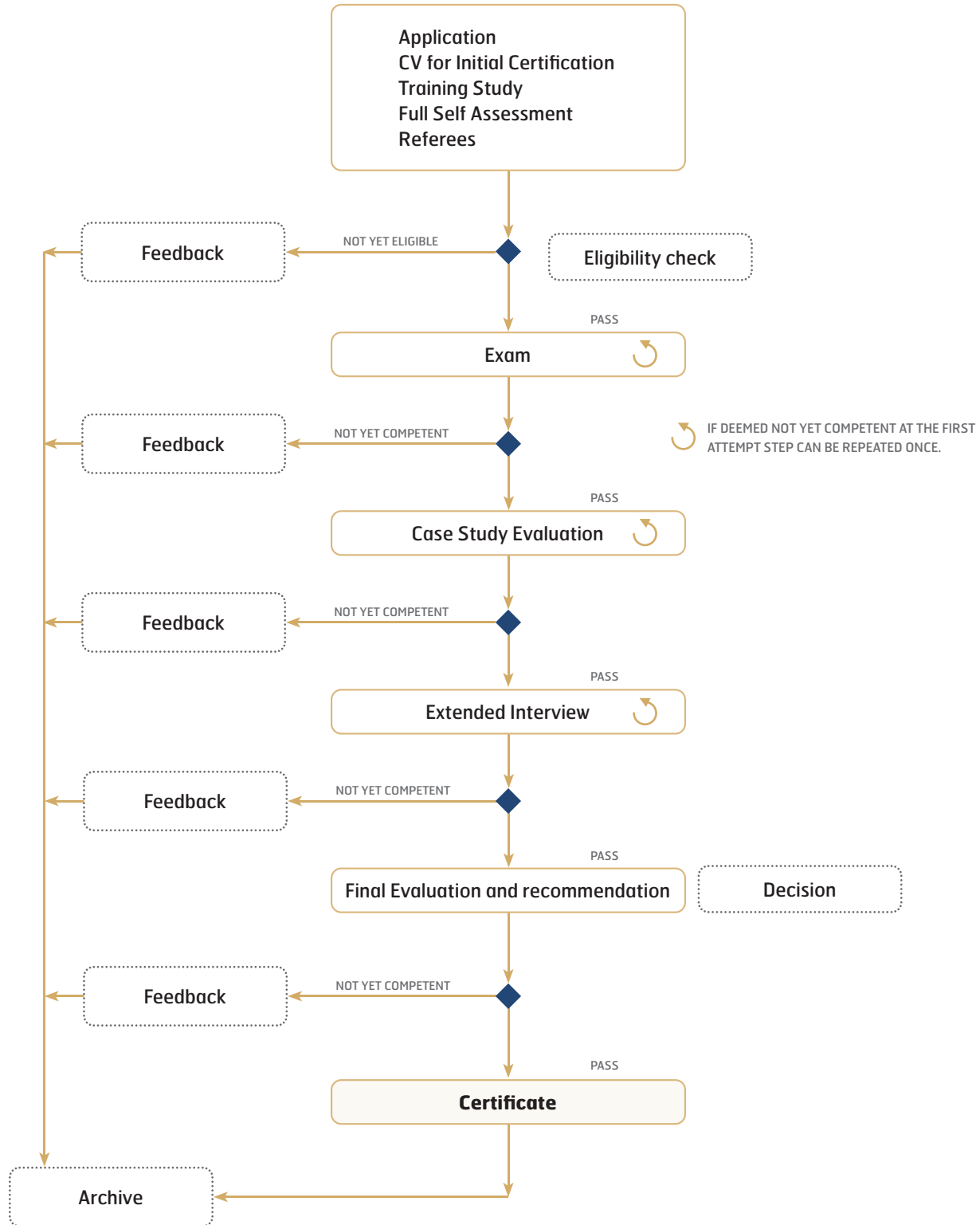


Figure 4. Assessment Path for IPMA® Level B Certified Senior Consultant and Coach

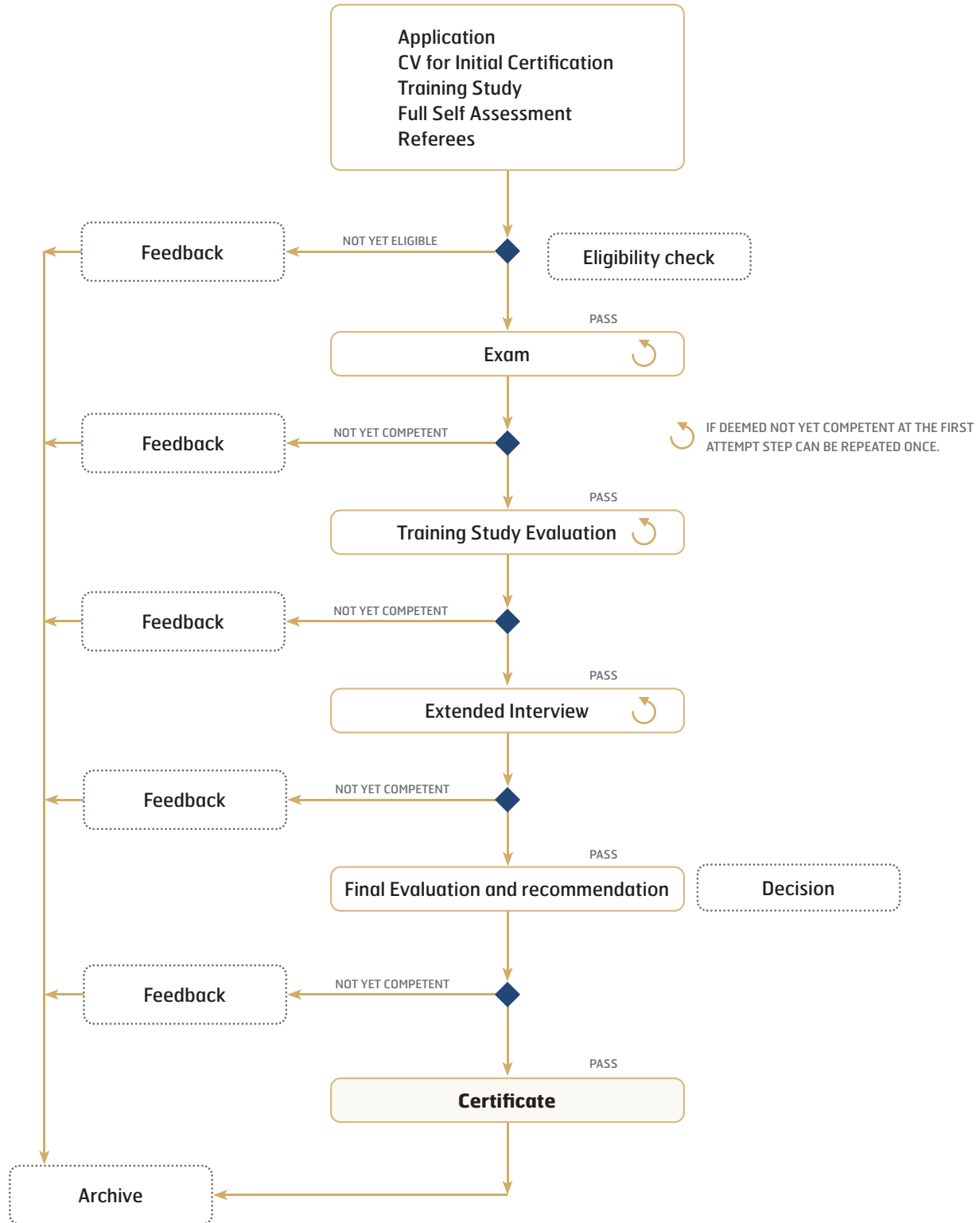


Figure 5. Assessment Path for IPMA® Level B Certified Senior Trainer

Assessment paths for **IPMA® Level C – Certified Consultant and Coach**  
and Certified Trainer are shown at the figures below.

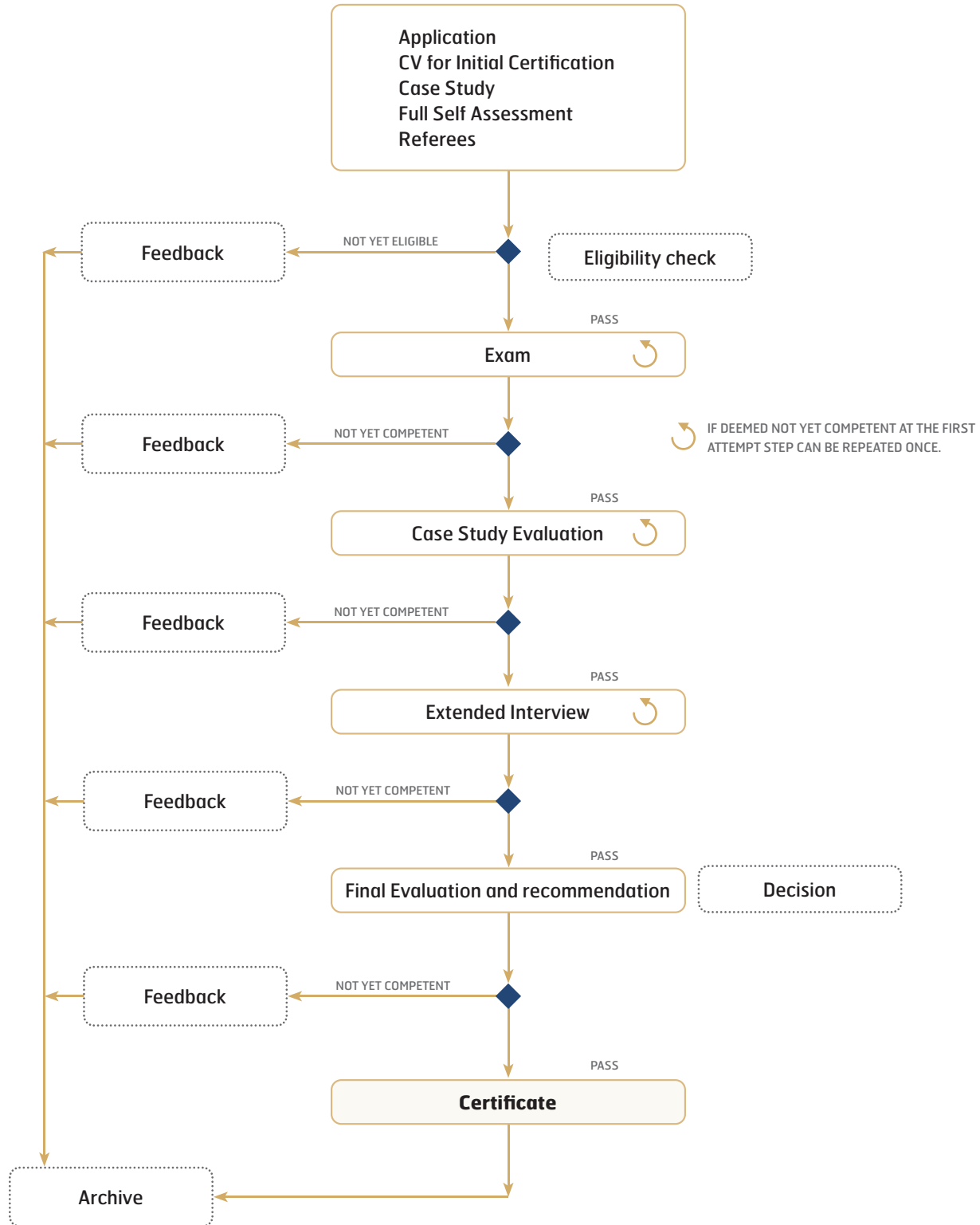


Figure 6. Assessment Path for IPMA® Level C Certified Consultant and Coach

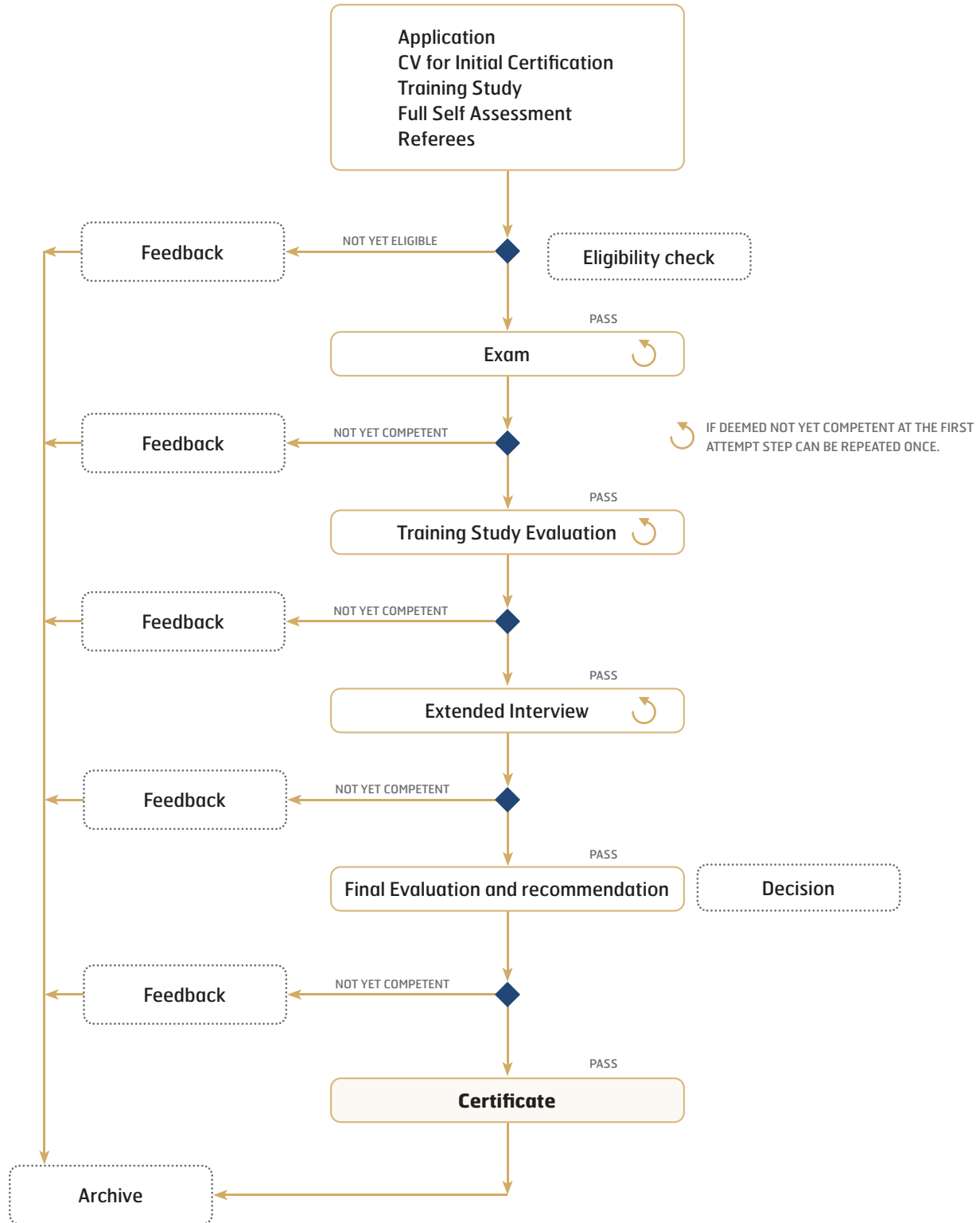


Figure 7. Assessment Path for IPMA® Level C Certified Trainer

### 4.3. Candidate failure on initial certification

4.3.1 Candidates shall be permitted to retake the specified parts (🔄) of the assessment once if they are unsuccessful on their first attempt within the scope of the same application. The CB shall publish the corresponding additional administration fee for re-taking a specific element.

4.3.2 The repetition of the extended interview shall have at least one new Assessor assigned by the CB:

### 4.4. Competence baseline for assessment

4.4.1 The frame of reference for the assessment process is the Competence Elements (CE) as defined in the IPMA Individual Competence Baseline 4 (IPMA ICB4) and in the IPMA Individual Competence Baseline for Consultants, Coaches and Trainers (ICB4CCT)). Hereafter, references to 'ICB' cover both IPMA ICB4 and ICB4CCT unless explicitly stated otherwise.

### 4.5. Competence Element (CE)

4.5.1 Like ICB4, ICB4CCT has a number of Competence Elements (CEs), each of which has a number of Key Competence Indicators (KCI). The assessment of a Candidate is undertaken at the CE level using evidence validated at the KCI level to make the assessment.

4.5.2 The IPMA ICB definition of individual competence is "the application of knowledge, skills and abilities in order to achieve the desired results in a work environment." Using this definition:

- » The assessment of a Level A Candidate shall be based on the demonstration of profound subject matter expertise of the CE applied in consulting/coaching/training assignments with a strategic impact on individuals, teams or organisations. For the purposes of evaluating Level A candidates, the demonstration of 'profound' subject matter expertise shall require the candidate demonstrate expertise significantly beyond the depth of expertise required at Level B.

- » The assessment of a Level B Candidate shall be based on the demonstration of deep subject matter expertise of the CE applied in consulting/coaching/training assignments for individuals, teams or organisations.
- » The assessment of a Level C Candidate shall be based on the demonstration of moderate subject matter expertise of the CE applied in consulting/coaching/training assignments for individuals, teams or organisations.

4.5.3 Exam questions and interview questions used for Levels A, B and C for CC and T shall be formulated in such a way that they allow Candidates to demonstrate application of knowledge, skills and abilities.

### 4.6. Coverage and achievement of Levels A, B and C for CC and T

4.6.1 No one-assessment method shall cover all CEs.

**There are two types of assessment possible:**

- » candidates who are IPMA PM certificate holders at Levels A, B, C or D do not undertake the exam
- » candidates who are not IPMA certificate holders, undertake the IPMA level D exam.

4.6.2 Candidates for CCT Levels A, B or C who undertake an IPMA level D exam, must demonstrate sufficient evidence of 80% of the project management domain CEs defined in ICB4.

4.6.3 To demonstrate sufficient evidence against a specific ICB4CCT CE, a Candidate shall demonstrate a minimum of 50% of the KCIs of each CE. The CB shall capture this evidence of attainment.

4.6.4 To achieve a Level A, candidates must demonstrate evidence of profound subject matter expertise of 80% of the CEs defined in the relevant part of ICB4CCT.

4.6.5 To achieve a Level B, candidates must demonstrate evidence of deep subject matter expertise of 80% of the CEs defined in the relevant part of ICB4CCT.

4.6.6 To achieve a Level C, candidates must demonstrate evidence of moderate subject matter expertise of 80% of the CEs defined in the relevant part of ICB4CCT.

4.6.7 CBs shall construct the content of the assessment path so that evidence of the ICB4CCT CE KCIs can be drawn from across the assessment methods used.

## 4.7. Key certification steps

### Application (levels A, B and C)

4.7.1 The CB shall apply items described in Section 3.2 of IPMA ICR4-Public for applications from CC and T candidates.

4.7.2 The application shall include:

- » the Candidate's personal details;
- » the certification level and role being applied for; and
- » a signature of the Candidate, which may be in an electronic form or any other legally accepted format.

Both roles – CC and T – shall undertake the full self-assessment for all the levels they apply for.

### Full Self-assessment

4.7.3 For Levels A, B and C, the Applicant shall complete a full self-assessment (knowledge [optional], skills [optional] and abilities [mandatory]) for all CEs of the ICB4CCT for the relevant PM consulting, coaching or training level and role applied for.

4.7.4 The CB shall use the Applicant's self-assessment in the application phase to assess their suitability. The Applicant's self – assessment may be considered by the assessors in their initial preparation; however, it is not part of the calculation for a pass or not. The Applicants self-assessment may be re-used after the assessment has been completed and a recommendation has been made to the CB by the Assessor(s) in order to provide comparative feedback to the Candidate.

### Curriculum Vitae

4.7.5 The Applicant is to provide a detailed summary of the work conducted in the role of consultant, coach or trainer to meet IPMA regulations for CCT. Sufficient detail needs to be provided by the Applicant to enable the Assessors to assess suitability of the role and IPMA level being applied for.

4.7.6 The Applicant's CV, or equivalent document, for initial certification shall, as a minimum, include:

- » the name and contact details of the Applicant;
- » a career history including:
  - relevant consultant, coach or trainer roles in project, programme and portfolio management and positions held;
  - relevant formal education (university etc.);
  - degrees and coursework from accredited institutions of higher learning;
  - relevant professional certifications and qualifications;
  - relevant project, programme and portfolio management training;
  - relevant memberships (if any); and
  - relevant Professional Development (PD) including awards, achievements or publications such as books, articles, presentations.

### List of consulting and / or coaching assignments

4.7.7 For the IPMA® Consultant and Coach Applicant, experience in project, programme or portfolio management consulting and coaching is required. The CB shall ensure that the Applicant submits it for assessment on the eligibility criteria. The list of consulting and / or coaching assignments may be used by the Assessors in preparation for extended interview. List of consulting and / or coaching assignments can be included to Application form.

The Applicant shall demonstrate how he or she meets the eligibility criteria and submit a list of PM consultancy and / or

coaching assignments in a form provided by the CB. The CB shall provide the form with the following fields for information on the assignments:

- » Experience of consulting and / or coaching activities in project management with fields such as deliverables, duration, phases, management complexity, etc.;
- » role of the applicant and his or her responsibilities within the assignment/service provided;
- » total duration, time and workload of the applicant's engagement (fields to capture, for example – 5 years as 25% of a full-time job).

### Case Study

4.7.8 For the IPMA® Consultant and Coach certification the Applicant shall provide a case study representing his or her knowledge and experience in project management consulting and coaching areas. For Level C the Applicant's Case Study shall cover a minimum of one assignment; for Levels A and B the Applicant's case study shall provide a minimum of 2 assignments.

4.7.9 The Applicant for IPMA® Consultant and Coach certification shall submit representative consulting cases according to a form provided by the CB. The CB shall provide the form with the following fields for information on the case study:

- » background (type, scope, customer, other important interested parties, resources, etc.);
- » assignment objectives;
- » organisation description;
- » delivery of consultancy/coaching services;
- » roles and responsibilities of the applicant;
- » distinctive elements of the consultancy/coaching assignment;
- » results and client's satisfaction.

The major part of the case study shall address:

- » consulting and / coaching challenges and how these were addressed. The Applicant shall address the management challenges for at least 5 core and 5 specific consultant and coach CEs from the IPMA ICB4CCT standard.

- » reflections upon the consultancy or coaching results, analysis and lessons learned.

### List of training assignments

4.7.10 For the IPMA® Trainer certification a list of training assignments he or she delivered or supported is required. The Applicant shall demonstrate how he or she meets eligibility criteria and submit a list of PM training delivered in a form provided by the CB. The list of training assignments and feedback from training attendees can be included in the Application form.

The CB shall provide the form with the following fields for information:

- » the name, place, date and duration of each training;
- » number of persons attended each training;
- » attendees' feedback with the number and percentage of training attendees with positive (good and very good) feedback for each training.

### Training Study

4.7.11 For the IPMA® Trainer certification, the Applicant shall provide a training study which has been developed, delivered or supported by the Applicant to meet the requirements of the eligibility criteria for the level applied. For Level C, the Applicant shall provide a training study with a minimum of 1 training assignment; for Levels A and B the Applicant shall provide a training study with a minimum of 2 training assignments.

Each training assignment shall contain (but is not limited to) the following:

- » the content of transmitted information, including its relation to the IPMA ICB4CCT competence elements;
- » the organization of the training curriculum which includes structure, format and sequencing;
- » the training methods used;
- » results and client's satisfaction collected.

The major part of the training study shall address:

- » the outcomes of the training conducted;
- » reflections upon the training results, analysis and lessons learned.

Training includes teaching project, programme and portfolio management.

### Referees

4.7.12 Each Applicant shall provide names and contact details for at least two professional referees who are familiar with the Applicant's eligible work experience.

### Eligibility Check

4.7.13 The CB shall conduct the eligibility check according to the Section 3.2 the IPMA ICR4-Public.

### Exam (Levels B and C for CC and T)

4.7.14 Each CB ensures that all exams are conducted in a controlled environment that is appropriately supervised with documented procedures that ensure the exam, its papers, questions and any exam-related material is securely controlled. This includes the checking of candidate identities.

4.7.15 A candidate for Level B or C certification is required to pass the IPMA® Level D exam.

4.7.16 If a Candidate for Level B or C certification holds a valid IPMA® Level A, IPMA® Level B, IPMA® Level C or IPMA® Level D PM certificate, assessors shall accept this as evidence of PM knowledge and the candidate does not have to take the exam.

### Case Study Evaluation (For levels A, B and C for Consultants and Coaches)

4.7.17 The case study evaluation applies to candidates for IPMA Consultant and Coach certification. The CB assigned Assessors shall evaluate the case study of

each IPMA Consultant and Coach Candidate for Levels A, B and C.

4.7.18 The case study evaluation shall be conducted by the Assessors on the basis of the case studies that the candidate prepared at the application stage. Each case study shall be evaluated by CE by two assessors. They can 'pass' it or find it 'not yet competent'. If the latter, the candidate shall be notified and asked to present an updated case study.

4.7.19 If some CEs were not relevant in the case study, the candidate may be asked at the extended interview why this was the case and how he or she dealt with them in another consulting or coaching assignment.

### Training Study Evaluation (For levels A, B and C for Trainers)

4.7.20 The training study evaluation is applied to candidates for IPMA Trainer certification. The CB assigned Assessors shall evaluate the training study of IPMA Trainer Candidates for Levels A, B and C.

4.7.21 The training study evaluation shall be conducted by the Assessors on the basis of the training study that the candidate prepared at the application stage. Each training study shall be evaluated by CE by two assessors. They can 'pass' it or find it 'not yet competent'. If the latter, the candidate shall be notified and asked to present an updated training study.

4.7.22 If some competence elements were not relevant in the training study, the candidate can be asked at the extended interview why this was the case and how he or she dealt with them in another training programme assignment.

### Extended Interview

4.7.23 The Extended Interview applies to candidates for IPMA Consultant and Coach certification for Levels A, B and C and to candidates for IPMA Trainer certification for Levels A, B and C.



4.7.24 Two assessors shall be actively involved in the extended interview.

4.7.25 Prior to the interview, the Assessors shall familiarise themselves with the information provided by the Candidate during the application process and the assessment process.

4.7.26 The Assessors shall verify the identity of each Candidate via a government- or company-issued photo ID.

4.7.27 In advance of the interview, the Assessors shall identify which specific CEs and KCIs shall be assessed for each Candidate and shall ask questions they have previously prepared related to the materials provided. During the interview, the Assessors may use appropriate follow up questions as necessary.

4.7.28 The Assessors shall seek evidence from the Candidate up to the time duration of the interview. The Assessors may conclude the interview early if the evidence sought has been achieved.

4.7.29 During the extended interview of CC Candidates, core and specific consulting and coaching ICB4CCT CEs which were not covered in previous assessment steps should be assessed.

4.7.30 During the extended interview of T Candidates, core and specific training ICB4CCT CEs, which were not covered in previous assessment steps should be assessed.

4.7.31 IPMA Consultant and Coach candidates may be asked to make a brief but detailed presentation to the assessors on their case study. The candidate may illustrate their answers by presenting examples of documents in addition to the case study (e.g. from PM consulting assignments) during the extended interview.

4.7.32 IPMA Trainer candidates shall conduct a 15 – 20 minutes demo training session and explain how he or she

developed, prepared and/or conducted, supported or led the training for the clients.

4.7.33 At the end of the interview the assessors may provide feedback to the candidate.

#### Duration of extended interview at IPMA levels A, B and C

	Level A	Level B	Level C
Duration	120 mins	120 mins	90 mins

Table 7. Extended interview duration requirements for levels A, B and C

4.7.34 The pass / failure criteria is 80% of the relevant ICB-4CCT CEs assessed.

#### Final evaluation, decision and certificate (All levels)

4.7.35 During the final evaluation, the assessor(s) determine if the candidate has satisfactorily met all required criteria for the IPMA CCT level and domain being applied for. The lead assessor then forwards the final evaluation to the CB for ratification and final decision. The CB makes the decision as to whether the candidate has passed or is not yet competent based upon the recommendation of the assessors after checking that all procedures have been followed and the documentation is complete.

4.7.36 Certificate information is published on the IPMA website as public information, unless the candidate objects in writing to the CB. Certificates are valid for five years after which the certificate holder may apply for re-certification at the same level or certification at a new level with appropriate evidence.

#### Feedback (All Levels)

4.7.37 In cases where an applicant is not accepted as a candidate, or a candidate fails the initial certification pro-

cess, they are informed in writing about the reasons for the decision by the CB. As part of the continuous improvement process, applicants and candidates may also be asked to complete a feedback questionnaire about their experiences concerning the certification process. This feedback is not used as part of the candidate assessment or decision-making process.

#### **Archiving (All Levels)**

4.7.38 The CB ensures that all records are properly controlled and archived for a minimum of six years.

## Chapter 5. Re-certification

### 5.1. Re-certification rules and criterion

5.1.1 For IPMA CC and T re-certification, the CB shall apply the same rules as defined in IPMA ICR4.

5.1.2 Re-certification is due 5 years after initial certification for each CCT Level of certification and role. Successful candidates receive a new certificate for 5 years starting from the date of re-certification approval or expiry of the old certificate whichever is the earlier.

5.1.3 It is the responsibility of the certificate holder to initiate, through application, the re-certification process up to a maximum of 6 months from their certificate expiry date. An extension may be provided by the CB up to 12 months from the certificate expiry date with justification.

5.1.4 The requirements for the different levels on re-certification are described in the table below:

	LEVEL A	LEVEL B	LEVEL C
	Certified Executive Consultant and Coach in project management	Certified Senior Consultant and Coach in project management	Certified Consultant and Coach in project management
	Certified Executive Trainer in project management	Certified Senior Trainer in project management	Certified Trainer in project management
Role-related experience required by the Applicant	Minimum 1500 working hours in last 5 years	Minimum 1000 working hours in last 5 years	Minimum 500 working hours in last 5 years
	Minimum of 35 hours evidence of CPD per annum (175 hours total) since the last (re-)certification		

Table 8: Re-certification criteria for all IPMA CCT Levels

5.1.5 If the certificate holder fails to re-apply within the time period, a new application will need to be undertaken under the initial certification process.

5.1.6 The following outcomes are possible as a result of the assessment:

- » renewal of the certificate for a further 5 years at the same level without an interview;
- » renewal of the certificate at the same level following satisfactory evidence provided from follow-up activity such as interview, referee comments, review of complaints and request to the Applicant for additional information; or
- » non-renewal of the certificate following unsatisfactory

interview and/or evidence provided from follow-up activity.

5.1.7 If non-renewal is recommended, supporting documentation with explanation shall accompany the recommendation.

5.1.8 The CB shall ensure that the certificate holder is aware of their responsibility to monitor the expiry date of their certificate and to initiate the re-certification process. As a service to certificate holders, the CB may issue invitations for re-certification.

## 5.2. Assessment path for re-certification

5.2.1 The CB shall establish, document and put into operation the process and procedures for re-certification for all levels in accordance with the re-certification

scheme shown below, without additions, including for those certificates that have previously been issued by a different CB.

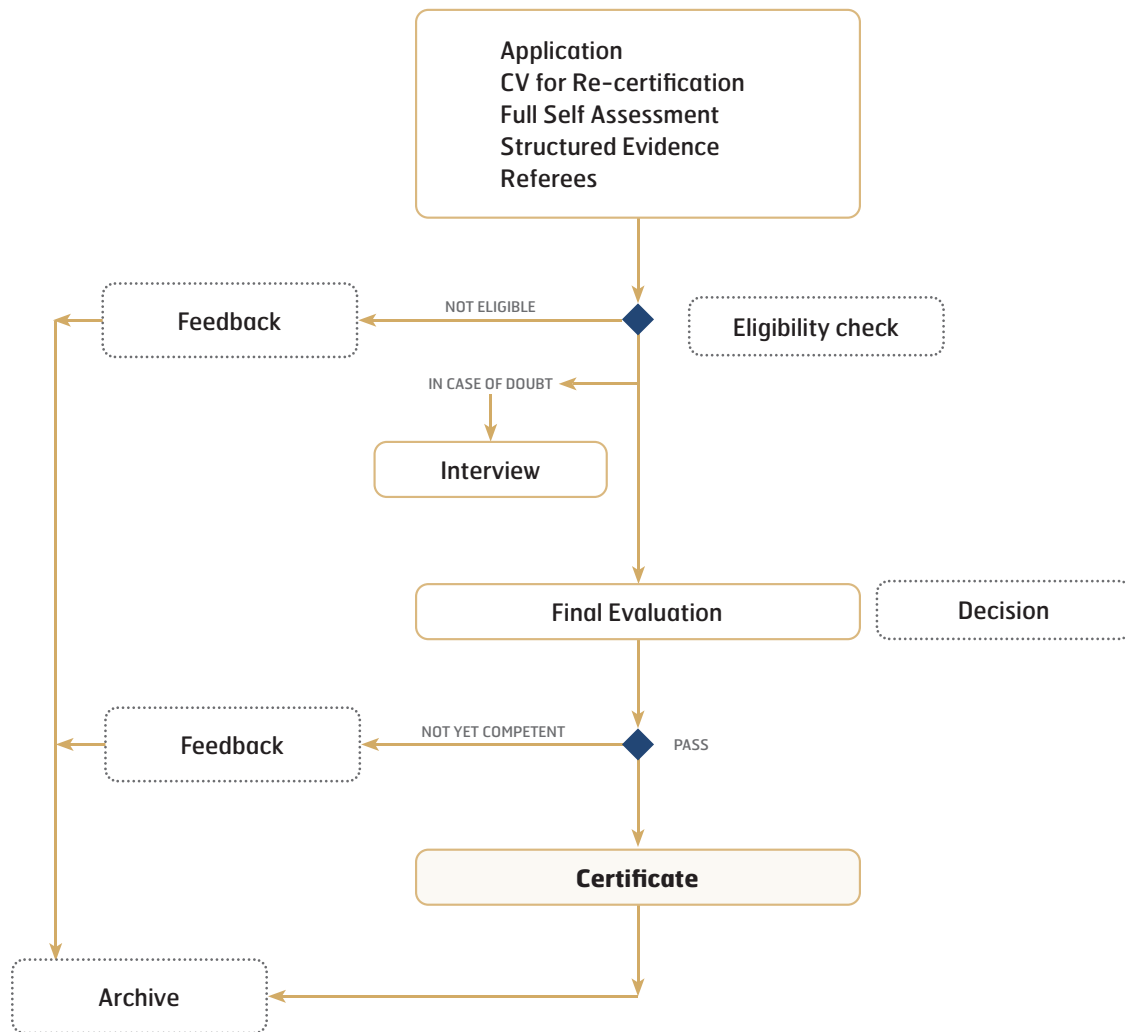


Figure 8: Re-certification Paths for all IPMA CCT levels

## 5.3. Re-certification step details

5.3.1 This section presents regulations for the re-certification steps of structured evidence and Interview which are different or in addition to those already described in the initial certification process.

5.3.2 The re-certification application shall be assessed by one Assessor. If there is any doubt as to the result, then the Assessor shall propose an interview, via the CB, and the Applicant shall be interviewed by two Assessors. The Assessors may also contact referees to complement the assessment.

### Structured evidence (re-certification)

- 5.3.3 In addition to CV evidence, the certificate holder shall provide sufficient evidence that they have undertaken a minimum of 35 hours CPD per annum since their last certification.
- 5.3.4 The Applicant shall provide details of referees who can be contacted to verify their continued level of engagement in CC or T assignments.
- 5.3.5 The CPD record shall be signed by the Applicant including as a minimum:
- » name of development activity;
  - » description of the activity;
  - » dates undertaken and hours claimed;
  - » CEs covered by the activity; and
  - » a summary statement reflecting on their learning from the CPD gained over the period and how they benefited.

### Interview (re-certification)

- 5.3.6 If any complaint has been received by the CB in writing against a re-certification Applicant about

their competence while being IPMA certified, it should be provided to the Assessor to consider.

- 5.3.7 If the Assessor, having evaluated the Applicant's documentation for suitability, considers it necessary to recommend an interview, the Assessor shall make the recommendation to the CB with a statement of what additional evidence is required. The CB shall decide if the interview takes place based on the Assessor's recommendation and evidence sought. If there is any doubt as to the result, then the Assessor shall propose an interview via CB and the Applicant shall be interviewed by two Assessors. The Assessors may also contact referees to complete the assessment.
- 5.3.8 The Applicant shall be asked to present the additional evidence sought at interview.
- 5.3.9 To contextualise the Applicant's claim of competence and professional development, the Applicant shall give the Assessors a 10-minute (maximum) presentation at the beginning of the interview.
- 5.3.10 The Interview shall last no longer than 1 hour in total.

## Chapter 6. Complaints and appeals

6.1.1 Each IPMA Certification Body (CB) publishes its process to deal with complaints and appeals in a fair, impartial, confidential and constructive manner.

6.1.2 The process ensures that all complaints and appeals are handled and processed within a three-month period from the date of receiving a complaint or appeal in

writing. Applicants and candidates may file an appeal in writing with the CB within 30 days from their certification decision. If the individual wishes to make a complaint about the CB, it should be sent to IPMA through the IPMA website for the attention of the IPMA Certification and Validation Management Board.