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.

Project Reflection & Presentation Guidelines

In order to demonstrate your competence as a Project Professional, CPP candidates are required to identify a project you have recently delivered 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. It is **not** 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 handover
- A conclusion that is linked to your previous discussion
- Clearly articulated and supported (SMART) recommendations
- Appendices, including the Business Case, Project Plan, sample Status Reports and other relevant and referenced project documents

As part of your reflection, you might also like to conduct one-on-one interviews key project stakeholders, such as the project sponsor and a client representative.

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

Part 2

You will then be required to make a **10-minute presentation** of your Project Reflection, followed by a **10-minute question and answer session** to complete this assessment activity. You will be contacted directly to schedule your presentation 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 the 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.

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:

- Business case
- Project charter
- Scope (WBS)
- Schedule
- Budget
- Stakeholder register
- Communications plan
- Procurement plan
- Position descriptions
- Risk register
- Human resource plan
- 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 the performing organisation 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 your stakeholder interviews and other primary data collection (stage two). 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.

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 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 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 http://ipm.edu.au/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.

EXECUTIVE SUMMARY .... *not included in word count…* 100 words

1 PROJECT OVERVIEW

1.1 Planned outputs .... 25 words

1.2 Intended outcomes .... 25 words

1.3 Strategic objectives .... 25 words

2 PROJECT PERFORMANCE

2.1 Performance against baseline plans

2.1.1 Performance against baseline scope .... 25 words

2.1.2 Performance against baseline schedule .... 25 words

2.1.3 Performance against baseline budget .... 25 words

2.2 Benefits delivered .... 25 words

2.3 Benefits yet to be realised .... 25 words

2.4 Changes .... 50 words

3 OPEN ACTIONS

3.1 Open project issues .... 25 words

3.2 Residual risks .... 25 words

3.3 Handover/training needs .... 25 words

3.4 Other required activities .... 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

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.

5 PROJECT MANAGEMENT TEMPLATES, TOOLS AND ASSETS .... 50 words

6 ACTION PLAN .... 200 words

7 APPENDICES .... *Not included in word count*

Total words: 1,000

Appendices

The following documents relevant to the project you have reviewed should be appended or linked to your report. You should independently prepare them for examination purposes is they do not already exist in the formats described.

Candidates who have successfully completed the Institute of Project Management's five (5) day Certified Project Officer (CPO) workshop **are not** required to submit appendices with their reflection – they have already demonstrated their competence in the preparation and interpretation of these key project documents.

Project charter

A project charter, endorsed by the relevant authorities.

At a minimum, the document must include:

- The project's purpose or justification, including measurable project outcomes and their link to organisational objectives
- High-level requirements (the scope)
- Target milestones (the schedule)
- The anticipated budget
- Project approval requirements (in other words, what constitutes project success, who decides the project is successful, and who signs off on the project)
- Critical success factors (such as any key assumptions, dependencies or risks)
- An assigned project manager, their responsibility, and authority level, and
- The name and authority of the sponsor or other person(s) authorising the Project Charter

You may use the template provided, or the workplace assets of your employer.

Stakeholder register

A stakeholder register / communication plan for your project with at least five (5) stakeholder entries.

At least two of your entries must be for high power / high interest stakeholders.

At a minimum, the document must include:

- Identifying information such as:
  - The project name
  - Its scheduled start and end dates, and
  - The document owner (usually the project manager)
- Definitions of key values, including:
  - Stakeholder categories (eg sponsor, client, supplier)
  - Stakeholder classifications (eg power v interest)
  - Stakeholder engagement levels (eg supportive, resistant)

Each entry must include:

- The stakeholder's organisational affiliation
- Their position in that organisation
- Their contact details
- Their category (eg sponsor, supplier, client)
- Their classification (eg power v interest)
- Their current v desired engagement level (eg supportive, resistant)

- Their requirements and expectations
- Any opportunities or unrealised potential they can bring to the project
- Their communication requirements and preferences
- How you intend to engage them (eg monitor, keep satisfied)
- Any delegations of authority that you or they may have in this regard
- A contact log detailing all your communications with them, and
- When you next intend to contact them

You may use the template provided, or one sourced from your workplace.

WBS, schedule & budget

A detailed WBS, schedule and budget for this project.

At a minimum, these assets must include **at least 15** linked, resource-allocated and costed tasks over two (2) hierarchy levels, with clearly marked dependencies and a critical path.

Ensure project management (QA) tasks such as team meetings, staff training, status reporting and project closure activities are also documented.

You can prepare your plan in Microsoft Project, or any other format.

Risk register

At least five (5) risk register entries for the project.

At a minimum, the document must include:

- Identifying information such as:
    - The project name
    - Its scheduled start and end dates
    - The document owner (usually the project manager)
- Organisational definitions of key values, including:
    - Risk categories and descriptors
    - Probability and impact ratings and descriptors
    - Risk assessment methodology / matrix
    - Risk threshold / treatment strategy
- Each entry must include:
    - Risk category
    - Risk name
    - Risk owner
    - Qualitative analysis of risk
    - Last and next review dates
    - Risk dictionary detail
        - Detailed risk description
        - Potential triggers & consequences
        - Current controls
        - Risk responses & reserves
        - WBS / schedule / budget impacts
        - Analysis of secondary and residual risks

The risk register should also address at least two significant risks associated with a procurement activity.

You may use the template provided, or one sourced from your workplace.

Position description

A detailed position description for one, key project team member.

At a minimum, the document must include their:

- Role
- Period and place of engagement
- Remuneration
- Responsibilities (relevant WBS tasks)
- Required competencies
- Training needs
- Delegated authority
- Accountabilities

For the purposes of assessment, specific training needs (including technical and interpersonal skills) should be identified, together with an individual training plan.

You should also include an **organisational chart** for this project, showing the hierarchical relationships between this team member and the others.

Ensure you consider all relevant organisational and legislative constraints.

You may use the template provided, or one sourced from your workplace.

Status report

The status report should include:

- The project's name
- The project's overall health (or status)
- Earned value data, including
    - Schedule and cost performance indices
    - Estimates to complete
- Changes to the risk environment
- Issues or barriers to planned performance (exceptions)
    - Issue name
    - Date and time reported
    - Priority or severity of the issue
    - Likely impact of issue
    - Who owns it
    - Current activity
    - Estimated time of arrival

3 Presentation / Q&A

You will then be required to make a **10-minute presentation** of your Project Reflection, followed by a **10-minute question and answer session** to complete this assessment activity. You will be contacted directly to schedule your presentation 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 the 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 defence; these may include key project documents, stakeholder interview notes, and the like.

As you will see from the assessment criteria (below), your presentation 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 Q&A, 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 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!

Candidates who have successfully completed the Institute of Project Management's five (5) day Certified Project Officer (CPO) workshop **may not** be required to present on their project reflection if they have already demonstrated their competence in these skills through their workshop participation and presentations.

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 Presentation.

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 candidate has successfully completed a detailed project reflection 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:...

Institute of Project Management

Project Reflection	Mastered	Advanced	Proficient	Developing	Unsatisfactory
Analysis	Applies complex concepts, theory and evidence from past studies to formulate solutions to complex problems or issues	Applies a range of methods and approaches to solve increasingly complex problems	Views and reframes problems or issues from multiple perspectives to better identify possible solutions	Completes basic analysis of a problem or issue using standard methods, concepts and tools	Limited understanding of the relevant issues
Critical thinking	Designs, uses and evaluates research and research methods to accurately investigate complex problems, situations or issues	Applies the critical elements of a methodology or theoretical framework to flexibly and precisely complete a broader based investigation	Defines the critical elements of the methodology or theoretical framework for completing a routine inquiry or investigation	Collects information to investigate and gain an accurate understanding or perspective on a routine problem or issue	Supports diagnosis and opinions with few reasons and little evidence; argument is one-sided and not objective
Problem solving	Displays sound judgement when making decisions involving complex problems	Uses experience and information to generate a variety of high-quality alternative approaches to resolve a problem	Completes comprehensive problem analysis using a range of advanced processes, techniques and tools	Analyses problems accurately using a range of standard processes, techniques and tools	Fails to adequately identify and/or respond to problems
Recommendations	Frames solutions or guiding hypotheses that are sensitive to a variety of contextual factors	Decisively chooses the most effective solution after evaluating available solutions to a problem	Makes judgements and justifies decisions based on analysis of results from the problem solving process	Investigates and identifies a limited range of possible solutions for effectively addressing a problem	Insufficient, invalid or irrelevant recommendations.

Assessor notes:

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Project Reflection: 10-point style guide	PROFICIENT	DEVELOPING / UNSATISFACTORY
Grammar and spelling are correct.		
Plain, professional English is used.		
Acronyms and jargon are avoided / clearly explained.		
Information is organised into small, manageable paragraphs that cover one main idea.		
Key information is presented first, followed by the details.		
A table of contents and page numbering is used.		
Fonts are of an appropriate size and consistently used.		
Headings, subheadings, and bullets appropriate to the format are used to break up the information so it is easier to scan and process.		
Visual supplements (diagrams, illustrations, tables and charts) are legible, relevant and clearly explained.		
Page-breaks, line and paragraph spacing enable easy reading.		

Assessor notes:

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Presentation

Candidate name:...

Submitted date: ....

Assessor name: ....

Assessment date: ....

Presentation result

- ☐ The candidate has successfully completed a presentation of their project reflection to the required standard; **OR**
- ☐ The candidate has not yet met the required standard for their presentation; **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:...

Presentation	Mastered	Advanced	Proficient	Developing	Basic
Reflection	Sets and unrelentingly pursues the attainment of longer term professional, learning and career development opportunities	Sets short term professional, learning and career development goals	Assesses and critically reflects on own performance and learning to establish immediate learning and career opportunities	Regularly and proactively reviews personal strengths and weaknesses to promote awareness of areas for priority development	Relies on others to identify professional development needs and opportunities
Performance	Acts as a role model and coach to others seeking to learn and develop their professional skills and knowledge	Shows confidence and high levels of self-belief when taking action in familiar situations	Displays a high performance work ethic and the autonomy and commitment to achieve allocated responsibilities	Identifies the learning required to promote professional or work outcomes	Does not identify or display the requisite behaviours to succeed in the workplace
Interaction	Has the courage and capacity to adapt to new challenges or unfamiliar situations	Constantly assesses own performance and critically reviews personal impact on group outcomes	Maintains calm when confronted by the unexpected. Perseveres when confronted with difficult situations	Identifies and manages personal levels of stress. Reacts to pressure in a positive, controlled way	Does not identify or respond well to workplace pressure or stress
Clarity	The discussion would readily be understood by a non-expert audience	All but a relatively small number of highly technical pieces of the discussion would be understood by a non-expert audience	Most components of the discussion would be understood by a non-expert audience	Sufficient components of the discussion would be understood by a non-expert audience	A majority of the discussion of the presentation would not be understood by a non-expert audience
Q&A	Masterfully defends research by providing clear and insightful answers to questions; discussion was superior, accurate, and engaging	Competently defends findings by providing very helpful answers to questions; may occasionally need further reflection on minor points	Answers sufficient and with few errors; greater foundation needed from past work in area	Adequately defends research; answers questions, but often with little insight; frequently shows a need for deeper reflection on certain points	Does not adequately defend research; does not answer key questions; displayed poor grasp of material

Assessor notes:

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