

# IPMA level B portfolio management

IPMA level B portfolio management is dedicated to the experienced portfolio manager. With the IPMA level B certificate, you prove that you can manage complex portfolios independently.

## Eligibility criteria

In the last 8 years (In exceptional situations extendable to 12 years):

*At least 5 years (60 non-overlapping months) of experience as a portfolio manager, of which at least 3 years (36 months) in a responsible leadership role in complex portfolios (complexity  $\geq 25$ )*

## Portfolio indicators

For portfolio management, numerical criteria for complexity are even less relevant than for projects and programmes. Relevant aspects such as:

- the degree of agreement within the managerial/management board on the strategy  
the degree of agreement within the managerial/management board on priority criteria
- the existence or non-existence or degree of functioning of a portfolio decision-making body
- The diversity of the project/programme portfolio and what that means for the role of the portfolio manager cannot be measured in figures

In addition, your role as advisor and/or co-decision-maker and/or as portfolio manager determines the complexity of the project and programme portfolio. Therefore, we urge you to pay extensive attention in the various documents to the following:

- how you found the portfolio at the time of your appointment as portfolio manager (and – if applicable – how you made adjustments to the 'relevant aspects' listed above)

- Which actions you have initiated or facilitated yourself to improve the decision-making process, reports, the management and/or effectiveness of (programmes and projects in) the portfolio.
- which actions you have initiated or facilitated yourself to initiate, adjust and/or stop/temporalise initiatives within the portfolio (including programmes and projects).

Concerning the weight/size of the portfolio itself, we can merely mention some tentative factors. These factors are shown in the tables below. These numbers are purely indicative. As with project and programme management, your substantiation of the portfolio complexity score will be decisive in determining whether your portfolio experience is seen as IPMA level B or level A.

<b>Factors of portfolio complexity</b>	<b>Indicative guidelines IPMA level B</b>
Period that you were the portfolio manager responsible	≥ 15 months
Number of parallel projects/programmes in the portfolio with:	
Complexity score at IPMA B level	≥ 3
Complexity score at IPMA C level	≥ 10
Number of times per year that the portfolio changes substantially (≥ 10% reallocation)	≥ 2 x
Budgeted number of hours of projects/programmes (per year)	≥ 25.000
Number of hours spent by you as portfolio manager on the portfolio	≥ 1.000

A detailed description of the admission requirements and complexity can be found in the Explanatory Note and Instructions. The templates, instruction and sample papers are available on [request](#).

