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## Management of Portfolios



## Syllabus

*October 2014*

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## 1. Introduction

The *Management of Portfolios* (MoP) guidance provides advice and examples of how to apply principles, practices, and techniques that help optimize an organization's investment in change alongside its Business As Usual (BAU) work.

Qualifications are offered at two levels: Foundation and Practitioner.

The primary purpose of the syllabus is to provide a basis for accreditation of people involved with the selection and management of portfolios of projects and programmes. It documents the learning outcomes related to the use of MoP and describes the requirements a candidate is expected to meet to demonstrate that these learning outcomes have been achieved at each qualification level.

The target audience for this document is:

- Exam Board
- Exam Panel
- AXELOS Assessment Team
- Accredited Training Organizations.

This syllabus informs the design of the exams and provides accredited training organizations with a more detailed breakdown of what the exams will assess. Details on the exam structure and content are documented in the MoP Foundation and Practitioner Design documents.

## 2. Foundation Qualification

### 2.1 Purpose of the Foundation Qualification

The purpose of the Foundation qualification is to confirm that a candidate has sufficient knowledge and understanding to work as an informed member of a Portfolio Office or in a range of portfolio management roles. The Foundation qualification is also a pre-requisite for the Practitioner qualification.

### 2.2 Target Audience

This qualification is aimed at those involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and programme delivery, and benefits realization. It is relevant to all those involved in the selection and delivery of business change initiatives including: members of Management Boards and Directors of Change; Senior Responsible Owners (SROs); portfolio, programme, project, business change and benefits managers; and business case writers and project appraisers.

### 2.3 High Level Performance Definition of a Successful Candidate

This level aims to measure whether a candidate understands the principles, cycles, practices, techniques, roles, responsibilities, documents and organizational context within which portfolio management operates. Specifically to know and understand the:

- scope and objectives of portfolio management and how it differs from programme and project management
- benefits from applying portfolio management
- context within which it operates
- principles upon which successful portfolio management is based

- approaches to implementation, the factors to consider in maintaining progress, and how to assess the success of portfolio management
- purposes of the portfolio management definition and delivery cycles and their component practices, and relevant techniques applicable to each practice
- purpose and key content of the major portfolio documents
- scope of key portfolio management roles.

Only learning levels 1 (Knowledge) and 2 (Comprehension) are tested at Foundation level.

### 3. Practitioner Qualification

#### 3.1 Purpose of the Practitioner Qualification

The purpose of the Practitioner qualification is to confirm whether the candidate has achieved sufficient understanding of how to apply and tailor the MoP guidance and to analyse portfolio data, documentation and roles in relation to a scenario situation. A successful Practitioner candidate should, with suitable support, be able to advise on the implementation of appropriate practices and techniques, and apply the method to a live portfolio, but may not be sufficiently skilled to do this appropriately for all situations. Their individual expertise, the complexity of the portfolio, and the support provided will also influence the impact the Practitioner can achieve.

#### 3.2 Target Audience

This qualification is aimed at those involved in a range of formal and informal portfolio management roles encompassing investment decision making, project and programme delivery, and benefits realization. It is relevant to all those involved in the selection and delivery of business change initiatives including: members of Management Boards and Directors of Change; Senior Responsible Owners (SROs); portfolio, programme, project, business change and benefits managers; and business case writers and project appraisers.

#### 3.3 High Level Performance Definition of a Successful Candidate

Candidates should be able to apply and understand how to tailor MoP effectively. Specifically candidates should be able to demonstrate their ability to:

- define the business case to get senior management approval for portfolio management
- plan the implementation of portfolio management
- select and adapt MoP principles, practices and techniques to suit different organizational environments
- evaluate examples of MoP information (including documents and role descriptions)
- analyse the solutions adopted in relation to a given scenario.

The Practitioner syllabus will test learning at levels 3 (Application) and 4 (Analysis).

### 4. Learning Outcomes Assessment Model

A classification widely used when designing assessments for certification and education is the Bloom's Taxonomy of Educational Objectives. This classifies learning objectives into six ascending learning levels, each defining a higher degree of competencies and skills. (Bloom et al, 1956, Taxonomy of Educational Objectives).

AXELOS have incorporated this into a Learning Outcomes Assessment Model which is used to

provide a simple and systematic means for assessing and classifying the learning outcomes for AXELOS qualifications.

This structured approach helps to ensure:

- A clear delineation in learning level content between different qualification levels
- Learning outcomes are documented consistently across different areas of the guidance
- Exam questions and papers are consistent and are created to a similar level of difficulty.

## MoP Learning Outcomes Assessment Model

	1. Knowledge	2. Comprehension	3. Application	4. Analysis
<b>Generic Definition from AXELOS Learning Outcomes Assessment Model</b>	Know key facts, terms and concepts from the manual/guidance.	Understand key concepts from the manual/guidance.	Be able to apply key concepts relating to the syllabus area for a given scenario.	Be able to analyse and distinguish between appropriate and inappropriate use of the method/guidance for a given scenario situation.
<b>MoP Qualification Learning Outcome Assessment Model</b>	Know facts, including terms, principles, cycles, practices, techniques, documents, roles and responsibilities from the guidance.	Understand the terms, principles, cycles, practices, techniques, documents, roles and responsibilities in relation to portfolio management and the organizational context within which they operate.	Be able to apply with appropriate tailoring, the principles, practices, techniques, roles and responsibilities to suit the organizational circumstances, and in particular: <ul style="list-style-type: none"> <li>(i) design and apply appropriate strategies to implement, sustain and measure portfolio management;</li> <li>(ii) appropriate use of portfolio definition practices and relevant techniques;</li> <li>(iii) appropriate use of portfolio delivery practices and relevant techniques; and</li> <li>(iv) appropriate use of portfolio documentation and involvement of the relevant roles</li> </ul> for a given scenario.	Be able to identify, analyse and distinguish between appropriate and inappropriate use of the guidance through appraisal of the justification, planning, design, implementation and operation of portfolio management for a given scenario.

### 5. Syllabus Areas

The syllabus is presented by syllabus areas. This is the unit of learning which may relate to a chapter from the manual/guidance or several concepts commonly grouped together in a training course module.

The following syllabus areas are identified.

Version 2.3

Page 4

Owner: Chief Examiner

Syllabus Area Code	Syllabus Area Title
OV	Overview
IS	Implement, sustain and measure
SO	Strategic and organizational context
PP	Portfolio management principles
DF	Portfolio definition cycle
DL	Portfolio delivery cycle
RD	Roles and documentation

#### Notes

i. Questions based on a syllabus area may refer to material from other sections of the MoP guidance.

## 6. Syllabus Presentation

For each syllabus area learning outcomes for each learning level are identified. Each learning outcome is then supported by a description of the requirements that a candidate is expected to meet to demonstrate that the learning outcome has been achieved at the qualification level indicated. These are shown as syllabus topics.

All Foundation level requirements are assumed to have been met for Practitioner level and are not directly assessed again, although Foundation level knowledge and understanding will be used when demonstrating Practitioner application and analysis learning outcomes.

Each of the syllabus areas is presented in a similar format as follows:

Syllabus Area Code		Syllabus Area :		Foundation	Practitioner	Primary References
DF [2]		MoP Syllabus Area [1]				
Level	Topic					
<b>Know fact, terms and concepts relating to the <i>syllabus area</i>. [3]</b>						
<b>Specifically to recall:</b>						
01 [4]	01 [5]	[6]		[7]		[8]
01	02					

#### Key to the Syllabus Area table

- |   |                    |   |
|---|--------------------|---|
| 1 | Syllabus Area      | Unit of learning, e.g. chapter of the reference guide or course module. |
| 2 | Syllabus Area Code | A unique 2 character code identifying the syllabus area.                |

3	<b>Learning Outcome</b> (topic header shown in bold)	A statement of what a candidate will be expected to know, understand or do.
4	<b>Level</b>	Classification of the learning outcome against the AXELOS OTE Learning Outcomes Assessment Model.
5	<b>Topic Reference</b>	Number of the topic within the learning level.
6	<b>Topic Description</b>	Description of what is required of the candidate to demonstrate that a learning outcome has been achieved at the qualification level indicated
7	<b>Foundation/Practitioner</b>	Shows at which qualification level the topic is assessed.  N.B A topic is only assessed at one qualification level.
8	<b>Primary Reference</b>	The main reference supporting the topic.

## 7. Important Points

The following points about the use of the syllabus should be noted.

### 7.1 MoP Guide References

The MoP guide references provided should be considered to be indicative rather than comprehensive, i.e. there may be other valid references within the guidance.

In practice, at Practitioner level, questions based on a syllabus topic may require knowledge of material from other sections of the MoP guidance. This will be clear from the context of the question and the scenario.

The references provided include sections (e.g. 4.7) and sub-sections (e.g. 4.3.4). Where a specific section is referenced, e.g. 4.9, this refers to that section only – it does not refer to its sub-section, e.g. 4.9.1 to 4.9.5. However, where a range of sections is referenced, e.g. 4.3 – 4.4, all sub-sections of the referenced sections are meant to be included.

### 7.2 Syllabus Exclusions

Examinations will be based on the main MoP guide and won't include items only addressed in the accompanying '*An Executive Guide to Portfolio Management*'.

The examples shown in the shaded boxes throughout the MoP guide are not examined.

<b>Syllabus Area Code</b>  OV	<b>Syllabus Area:</b>	<b>Foundation</b>	<b>Practitioner</b>	<b>Primary Reference</b>
	<b>Overview</b>			

Syllabus Area Code		Syllabus Area: Overview	Foundation	Practitioner	Primary Reference
OV					
Level	Topic				
		<b>Know facts, terms and concepts relating to an Overview of portfolio management.</b>			
		<b>Specifically to recall:</b>			
01	01	The definitions of portfolio and portfolio management.	9		2.3
01	02	The portfolio management model and the relationship between the principles, cycles, practices and relevant techniques.	9		2.4
01	03	The names of the portfolio definition practices.	9		6.1
01	04	The names of the portfolio delivery practices.	9		7.1
		<b>Understand the terms and concepts relevant to an overview of portfolio management.</b>			
		<b>Specifically to identify:</b>			
02	01	The scope of portfolios and portfolio management and the differences from projects/project management and programmes/programme management.	9		2.3
02	02	The local circumstances that will affect how the MoP principles and practices will be adapted and how cost effective approaches can be adopted.	9		2.2
02	03	The objectives and benefits of portfolio management.	9		2.2, 2.5
		<b>Be able to apply and tailor MoP to a scenario.</b>			
		<b>Specifically to:</b>			
		There are no level 3 topics for this syllabus area.*			
		<b>Be able to identify, analyse and distinguish between appropriate and inappropriate application of the syllabus area to a scenario.</b>			
		<b>Specifically to analyse:</b>			
		There are no level 4 topics for this syllabus area.*			

\* Overview topics are not specifically included at Practitioner level as they may be examined within the other relevant syllabus areas.



Syllabus Area Code		Syllabus Area:	Foundation	Practitioner	Primary Guide Reference
IS		Implement, sustain and measure			
Level	Topic				
<b>Know facts, terms and concepts relating to implementing, sustaining and measuring portfolio management.</b> <b>Specifically to recall:</b>					
01	01	The three broad approaches to implementing portfolio management.	9		5.3
01	02	The benefits of assessing the impact of portfolio management.	9		Appendix F
<b>Understand how to implement, sustain and measure portfolio management.</b> <b>Specifically to identify:</b>					
02	01	When each approach to implementation is most relevant, the advantages of planned approaches to implementation, and the first seven steps (and their benefits) in a staged implementation of portfolio management.	9		5.3, 2.2
02	02	The factors to consider in sustaining progress.	9		5.4
02	03	Approaches to assessing portfolio management maturity and the impact of portfolio management including examples of performance metrics that can be employed.	9		7.2.2.5 & Appendix F
<b>Be able to apply and tailor the recommended approaches taken to implementing, sustaining and measuring portfolio management to a scenario.</b> <b>Specifically to:</b>					
03	01	Identify appropriate approaches when implementing, sustaining, and measuring portfolio management for a given scenario, including: <ul style="list-style-type: none"> <li>1. Selection of an appropriate approach to implementation.</li> <li>2. Coordination of portfolio management with key corporate functions.</li> <li>3. Designing and evaluating approaches to portfolio governance.</li> <li>4. Designing a strategy to sustain progress.</li> <li>5. Building and maintaining organizational energy to support effective operation of the portfolio definition and delivery cycles.</li> <li>6. Assessing progress encompassing process maturity and evidence of impact.</li> </ul>	9		5.3, Chapter 3  4.4, 4.6, 7.7, 5.4, 4.3  4.7, 5.5  Appendix F
<b>Be able to identify, analyse and distinguish between appropriate and inappropriate application of the recommended approaches to implementing, sustaining and measuring portfolio management within a scenario.</b> <b>Specifically to analyse:</b>					

Syllabus Area Code		Syllabus Area:	Foundation	Practitioner	Primary Guide Reference
IS		Implement, sustain and measure			
04	01	Whether recommended approaches to implementing, sustaining, and measuring portfolio management have been undertaken appropriately in the context of a given scenario, with reasons.		9	5.3 Chapter 3 4.4, 4.6, 7.7 5.4, 4.3 4.7, 5.5 Appendix F

Syllabus Area Code		Syllabus Area: Strategic and organizational context	Foundation	Practitioner	Primary Guide Reference
SO	Level	Topic			
		<b>Know facts, terms and concepts relating to the relationships between portfolio management and other corporate functions and activities with a role in delivering strategic objectives.</b> <b>Specifically to recall:</b>			
01	01	The 6 key functions/activities that portfolio management needs to coordinate with to achieve strategic objectives.	9		3.1
		<b>Understand the key aspects of the relationships between the portfolio and other corporate functions and activities with a role in delivering strategic objectives.</b> <b>Specifically to identify:</b>			
02	01	How portfolio management and business as usual (BAU) coordinate to deliver strategic objectives.	9		3.2
02	02	How portfolio management and strategic planning coordinate to deliver strategic objectives.	9		3.3
02	03	How portfolio management and budgeting and resource allocation coordinate to deliver strategic objectives.	9		3.4
02	04	How portfolio management and programme and project management coordinate to deliver strategic objectives.	9		3.5
02	05	How portfolio management and performance management coordinate to deliver strategic objectives.	9		3.6
02	06	How portfolio management supports effective corporate governance.	9		3.7
		<b>Be able to apply and tailor MoP to a scenario.</b> <b>Specifically to:</b>			
		There are no level 3 topics for this syllabus area.*			
		<b>Be able to identify, analyse and distinguish between appropriate and inappropriate application of the syllabus area to a scenario.</b> <b>Specifically to analyse:</b>			
		There are no level 4 topics for this syllabus area.*			

\* Strategic and organizational context topics are not specifically included at Practitioner level because they are examined with the Implement, sustain and measure syllabus area in Question 1.

Syllabus Area Code		Syllabus Area:	Foundation	Practitioner	Primary Reference Guide
PP		Portfolio management principles			
Level	Topic				
<b>Know facts, terms and concepts relating to the principles upon which efficient and effective approaches to portfolio management are built.</b>					
<b>Specifically to recall:</b>					
01	01	The names of the five principles upon which effective portfolio management is based.	9		Figure 2.1
<b>Understand the principles upon which efficient and effective approaches to portfolio management are built.</b>					
<b>Specifically to identify:</b>					
02	01	The keys to success in relation to principle 1: Senior management commitment and specifically, the ways in which: <ul style="list-style-type: none"> <li>1. Senior management engagement supports effective portfolio management.</li> <li>2. Senior managers should support portfolio management.</li> </ul>	9		4.3
02	02	The keys to success in relation to principle 2: Governance alignment, and issues to consider in an effective portfolio governance structure.	9		4.4
02	03	The keys to success in relation to principle 3: Strategy alignment, and specifically: <ul style="list-style-type: none"> <li>1. Approaches and techniques to align programmes and projects with organizational strategy.</li> <li>2. Techniques that facilitate strategic alignment even where strategic measures are not clearly defined.</li> </ul>	9		4.5
02	04	The keys to success in relation to principle 4: Portfolio Office, and specifically: <ul style="list-style-type: none"> <li>1. The services it provides.</li> <li>2. How it differs from a programme or project office.</li> </ul>	9		4.6
02	05	The keys to success in relation to principle 5: An energized change culture and specifically: <ul style="list-style-type: none"> <li>1. The elements of an energized change culture.</li> <li>2. The energy states.</li> <li>3. Sources of organizational energy.</li> </ul>	9		4.7, 5.5
<b>Be able to apply and tailor the portfolio management principles to a scenario.</b>					
<b>Specifically to:</b>					
		There are no level 3 topics for this syllabus area.*			
<b>Be able to identify, analyse and distinguish between appropriate and inappropriate application of the portfolio management principles to a scenario.</b>					
<b>Specifically to analyse:</b>					
		There are no level 4 topics for this syllabus area.*			

\* Portfolio management principles topics are not specifically included at Practitioner level because they are examined with the Implement, sustain and measure syllabus area in Question 1 (Senior management commitment, Governance alignment, Portfolio Office and Energized change culture) and with the Portfolio definition cycle (Strategy alignment) syllabus area in Question 2.

Syllabus Area Code		Syllabus Area: Portfolio definition cycle	Foundation	Practitioner	Primary Guide Reference
DF					
Level	Topic				
<b>Know facts, terms and concepts relating to the portfolio definition cycle. Specifically to recall the purpose(s) of:</b>					
01	01	The portfolio definition cycle and its key output.	9		5.6.1
01	02	The portfolio definition practices: 1. Understand 2. Categorize 3. Prioritize 4. Balance 5. Plan	9		6.2.1 6.3.1 6.4.1 6.5.1 6.6.1
<b>Understand the terms and concepts relating to the portfolio definition cycle. Specifically to identify:</b>					
02	01	The results of a well functioning portfolio definition cycle and the implications where this is not the case.	9		5.6.2, 5.6.3
02	02	The techniques, key features and uses, of: 1. Three point estimating and reference class forecasting. 2. Driver-based strategic contribution analysis. 3. Multi-criteria analysis. 4. Decision conferencing. 5. Clear line of sight planning.	9		6.4.2, 7.2.2.2, Glossary 4.5 6.4.2 6.4.2, Glossary 6.6, Glossary
02	03	What is involved and the keys to success in the understand practice.	9		6.2.2
02	04	What is involved and the keys to success in the categorize practice.	9		6.3.2
02	05	What is involved and the keys to success in the prioritize practice.	9		6.4.2, 6.4.3
02	06	What is involved and the keys to success in the balance practice.	9		6.5.2, 6.5.3
02	07	What is involved and the keys to success in the plan practice.	9		6.6.2
<b>Be able to apply and tailor the practices and techniques of the portfolio definition cycle to a scenario. Specifically to:</b>					
03	01	Identify appropriate practices and techniques within the portfolio definition cycle when: 1. Understanding the current portfolio. 2. Splitting the portfolio into organizationally appropriate categories or segments. 3. Using appropriate approaches to prioritize the portfolio. 4. Considering what factors need to be taken into account in balancing the portfolio. 5. Completing a portfolio strategy and delivery plan.	9		6.2 6.3 6.4, 4.5  6.5 6.6

Syllabus Area Code  DF	Syllabus Area:  Portfolio definition cycle	Foundation	Practitioner	Primary Guide Reference
<b>Be able to identify, analyse and distinguish between appropriate and inappropriate application of portfolio definition practices and techniques to a scenario.</b> <b>Specifically to analyse:</b>				
04	01 Whether the approaches adopted are appropriate, with reasons, in a given scenario when: <ol style="list-style-type: none"> <li>1. Understanding the current portfolio.</li> <li>2. Categorizing the portfolio.</li> <li>3. Prioritizing the portfolio.</li> <li>4. Balancing the portfolio.</li> <li>5. Completing a portfolio strategy and delivery plan.</li> </ol>		9	6.2 6.3 6.4, 4.5 6.5 6.6

Syllabus Area Code		Syllabus Area: Portfolio delivery cycle	Foundation	Practitioner	Primary Guide Reference
DL					
Level	Topic				
<b>Know facts, terms and concepts relating to the portfolio delivery cycle. Specifically to recall the purpose(s) of:</b>					
01	01	The portfolio delivery cycle.	9		5.7.1
01	02	The portfolio delivery practices: 1. Management control 2. Benefits management 3. Financial management 4. Risk management 5. Stakeholder engagement 6. Organizational governance 7. Resource management	9		7.2.1 7.3.1 7.4.1 7.5.1 7.6.1 7.7.1 7.8.1
<b>Understand the terms and concepts relating to the portfolio delivery cycle. Specifically to identify:</b>					
02	01	The results of a well functioning portfolio delivery cycle and the implications where this is not the case.	9		5.7.2, 5.7.3
02	02	The techniques of: 1. Management by exception 2. One version of the truth 3. Staged release of funding 4. Clear line of sight reporting 5. Champion-challenger model	9		7.2,2.3, Glossary 7.2.2.3, Glossary 7.2.2.2, 7.4.2 7.2.2.3, Glossary 7.6.2, Glossary
02	03	What is involved, the main elements, and keys to success of the management control practice.	9		7.2.2
02	04	What is involved, the main elements, and keys to success of the benefits management practice.	9		7.3.2
02	05	What is involved, the main elements, and keys to success of the financial management practice.	9		7.4.2
02	06	What is involved, the main elements, and keys to success of the risk management practice.	9		7.5.2
02	07	What is involved, the main elements, and keys to success of the stakeholder engagement practice.	9		7.6.2-4
02	08	What is involved, the main elements, and keys to success of the organizational governance practice.	9		7.7.2
02	09	What is involved, the main elements, and keys to success of the resource management practice.	9		7.8.2
02	10	The challenges and solutions to effective dependency management.	9		7.5.3



Syllabus Area Code		Syllabus Area:	Foundation	Practitioner	Primary Guide Reference
DL		Portfolio delivery cycle			
<b>Be able to apply and tailor the practices, techniques and responsibilities of the portfolio delivery cycle to a scenario.</b> <b>Specifically to:</b>					
03	01	Identify appropriate practices and techniques within the portfolio delivery cycle encompassing: <ol style="list-style-type: none"> <li>1. Management control</li> <li>2. Portfolio-level benefits management</li> <li>3. Portfolio-level financial management</li> <li>4. Portfolio-level risk management</li> <li>5. Portfolio-level stakeholder engagement</li> <li>6. Portfolio-level resource management</li> </ol>		9	7.2 7.3 7.4 7.5 7.6 7.8
<b>Be able to identify, analyse and distinguish between appropriate and inappropriate application of portfolio delivery practices and techniques to a scenario.</b> <b>Specifically to analyse:</b>					
04	01	Whether the approaches adopted are appropriate, with reasons, in a given scenario to: <ol style="list-style-type: none"> <li>1. Management control</li> <li>2. Portfolio-level benefits management</li> <li>3. Portfolio-level financial management</li> <li>4. Portfolio-level risk management</li> <li>5. Portfolio-level stakeholder engagement</li> <li>6. Portfolio-level resource management</li> </ol>		9	7.2 7.3 7.4 7.5 7.6 7.8

Syllabus Area Code		Syllabus Area:	Foundation	Practitioner	Primary Guide Reference
RD		Roles and documentation			
Level	Topic				
<b>Know facts, terms and concepts relating to the main portfolio management roles and key documentation.</b> <b>Specifically to recall:</b>					
01	01	The purposes of the main portfolio management roles identified in MoP: <ol style="list-style-type: none"> <li>1. Portfolio Direction Group/Investment Committee</li> <li>2. Portfolio Progress Group/Change Delivery Committee</li> <li>3. Business Change Director/Portfolio Director</li> <li>4. Portfolio Manager</li> <li>5. Portfolio Benefits Manager</li> </ol>	9		Appendix B
01	02	The purposes of the main portfolio management documentation: <ol style="list-style-type: none"> <li>1. Portfolio Management Framework</li> <li>2. Portfolio Benefits Management Framework</li> <li>3. Portfolio Strategy</li> <li>4. Portfolio Delivery Plan</li> <li>5. Portfolio Benefits Realization Plan</li> <li>6. Portfolio Financial Plan</li> <li>7. Portfolio Resource Schedule</li> <li>8. Portfolio Stakeholder Engagement and Communication Plan</li> <li>9. Portfolio Dashboard Report</li> </ol>	9		Appendix E
<b>Understand the definitions and concepts relevant to the main portfolio management roles and key documentation.</b> <b>Specifically to identify:</b>					
02	01	The responsibilities of the main portfolio roles identified in MoP: <ol style="list-style-type: none"> <li>1. Portfolio Direction Group/Investment Committee</li> <li>2. Portfolio Progress Group/Change Delivery Committee</li> <li>3. Business Change Director/Portfolio Director</li> <li>4. Portfolio Manager</li> <li>5. Portfolio Benefits Manager</li> </ol>	9		Appendix B

Syllabus Area Code  RD		Syllabus Area:  Roles and documentation	Foundation	Practitioner	Primary Guide Reference
02	02	The recommended contents of the main portfolio management documentation: <ol style="list-style-type: none"> <li>1. Portfolio Management Framework</li> <li>2. Portfolio Benefits Management Framework</li> <li>3. Portfolio Strategy</li> <li>4. Portfolio Delivery Plan</li> <li>5. Portfolio Benefits Realization Plan</li> <li>6. Portfolio Financial Plan</li> <li>7. Portfolio Resource Schedule</li> <li>8. Portfolio Stakeholder Engagement and Communication Plan</li> <li>9. Portfolio Dashboard Report</li> </ol>	9		Appendix E  7.3.2       7.2.2.3
<b>Be able to apply and tailor MoP to a scenario. Specifically to:</b>					
03	01	Identify appropriate information, using typical contents, for inclusion in the relevant portfolio documentation: <ol style="list-style-type: none"> <li>1. Portfolio Management Framework</li> <li>2. Portfolio Benefits Management Framework</li> <li>3. Portfolio Strategy</li> <li>4. Portfolio Delivery Plan</li> <li>5. Portfolio Benefits Realization Plan</li> <li>6. Portfolio Financial Plan</li> <li>7. Portfolio Resource Schedule</li> <li>8. Portfolio Stakeholder Engagement and Communication Plan</li> <li>9. Portfolio Dashboard Report</li> </ol>	9		Appendix E 7.2.2.1 7.3.2 6.6.2 7.3,2 7.4.2 7.8.2 7.6.2 7.2.2.3
03	02	Identify appropriate application of the main portfolio management roles identified in MoP: <ol style="list-style-type: none"> <li>1. Portfolio Direction Group/Investment Committee</li> <li>2. Portfolio Progress Group/Change Delivery Committee</li> <li>3. Business Change Director/Portfolio Director</li> <li>4. Portfolio Manager</li> <li>5. Portfolio Benefits Manager</li> </ol>	9		Appendix B
<b>Be able to identify, analyse and distinguish between appropriate and inappropriate application of the syllabus area to a scenario. Specifically to analyse:</b>					

Syllabus Area Code  RD		Syllabus Area:  Roles and documentation	Foundation	Practitioner	Primary Guide Reference
04	01	Whether the following portfolio documentation is fit for purpose, with reasons: <ol style="list-style-type: none"> <li>1. Portfolio Management Framework</li> <li>2. Portfolio Benefits Management Framework</li> <li>3. Portfolio Strategy</li> <li>4. Portfolio Delivery Plan</li> <li>5. Portfolio Benefits Realization Plan</li> <li>6. Portfolio Financial Plan</li> <li>7. Portfolio Resource Schedule</li> <li>8. Portfolio Stakeholder Engagement and Communication Plan</li> <li>9. Portfolio Dashboard Report</li> </ol>		9	Appendix E 7.2.2.1 7.3.2 6.6.2 7.3,2 7.4.2 7.8.2 7.6.2 7.2.2.3
04	02	Whether the specified roles have been involved appropriately, with reasons: <ol style="list-style-type: none"> <li>1. Portfolio Direction Group/Investment Committee</li> <li>2. Portfolio Progress Group/Change Delivery Committee</li> <li>3. Business Change Director/Portfolio Director</li> <li>4. Portfolio Manager</li> <li>5. Portfolio Benefits Manager</li> </ol>		9	Appendix B