Certification rules

Objective

The aim of certification as an "I2PM Certified Holistic Process Manager" is to gain public trust by having the Institute for Innovative Process Management e.V. (I2PM, certification body) recognize the competencies of individuals after they have passed an examination/test (analogous to recommendation by [1]). In order to achieve these competencies, the syllabus (to be founs in the website) defines learning objectives recognized by an board. The aim of teaching and examination this content is to ensure that the certified persons gain a process-oriented view of problems and opportunities relating to organizations and networks [2].

In particular, the certification is intended to ensure that participants not only have theoretical knowledge in the broad field of process management after completing the program, but are also able to apply this knowledge in specific business situations. The holistic competencies that the certificate certifies arise from the fact that the competencies to be tested include all phases of the BPM lifecycle, as well as questions of maturity and new trends, in addition to general process orientation.

The certification of the "I2PM Certified Holistic Process Manager" includes the necessity of a final examination, which must be taken once by the certificate holders [1]. This examination is designed to evaluate the knowledge and skills acquired by the participants and to ensure that they have successfully achieved the defined learning objectives. This examination guarantees the quality of the certification and ensures that graduates not only carry the certificate, but can also demonstrate the required competencies.

Contributors

A total of four roles are involved in the certification process:

1. **Certification body** (Board): The certification body is responsible for the development, implementation and monitoring of the certification program. It defines the standards, curricula, examination guidelines and procedures.
2. **Trainers**: The trainers are responsible for teaching the course content and preparing the candidates for the certification exam. They act as teachers and support the candidates in developing the required knowledge and skills according to the syllabus.
3. **Candidate** (participant): Is the person who undergoes the certification program in order to obtain the certificate. The candidate undertakes to fulfill the defined standards and requirements.
4. **Examiners**: The examiners are responsible for conducting the certification examinations and play a decisive role in the objective assessment of the candidates' performance.

The interaction of the four roles in the certificate program is of crucial importance for ensuring and increasing the quality and value of the certificate. Each role fulfills specific functions that together create an objective certification.

Examiner

In order to carry out the certification of persons, the candidate can prepare for the examination (a) in a training course or (b) independently using the syllabus and other documents (see website and references given). The examination always takes place under the responsibility of the I2PM as the certification body. In accordance with the recommendations of [1], the examination can be conducted (a) by a member of the I2PM Board (Board within certification body) or (b) by an examiner recognized by the I2PM Board.

The I2PM Board decides on the recognition and revocation of an 8 at its own discretion and sets the following general and specific requirements in analogy to ISO 17024 and the Vocational Training Act (cf. § 30 para. 1-2 BBiG):

- The examiner must know and understand the certification program.
  Specifically, examiners have developed the content of the certification program themselves or have worked in the area to be audited for several years
- Examiners must be able to apply the inspection procedure and the associated documents.
  Specifically: The examiners have been familiarized with the exam content and the test procedure.
- The examiners must be competent in the area to be audited (in the BPM or BPM-related field with at least a certificate of EQF 8).
  Specifically: Examiners are considered competent if they have at least a doctorate (EQF 8) in the field of process management or equivalent, or at least a master's degree in the field of process management and other recognized further training or certificates in process management (at least 300 work units) and also have more than 5 years of professional experience in process management.
- The language used must be spoken and written by the examiners.
  Specifically: The examiners are proficient in the language of the certificate course both orally and in writing (minimum level C1).
- The examiners must act objectively and no biased assessments may be made.
  Specifically: The examiners are informed in advance by the certifying body about the impartiality of assessments. In addition, the examiners are regularly checked by the certifying body on the basis of observations or feedback from participants, for example, to ensure that the examiner is still able to make an impartial assessment.
- The examiners must be associated with the certification body.
  Specifically: The auditors must be members of the I2PM as individuals or via their company.

Board

The Board (team responsible for the certification body of I2PM) is elected and voted out of office at the I2PM General Assembly. It consists of at least two people who also fulfill the requirements for examiners. Permanent members are always the coordinators of the I2PM

expert groups "Agile Process Management" and "Innovative BPM Body of Knowledge", in whose field and responsibility the certificate generally falls.

The responsibilities of the Certification Board include:

- **Development of certification standards**: The Board is responsible for establishing and updating certification standards. This includes defining the required knowledge, skills and competencies expected of program participants.
- **Creation and maintenance of the syllabus**: The Board develops the curriculum of the certification program, which defines the topics, learning objectives and the course of the program. This syllabus should meet the certification standards and ensure that participants acquire the required competencies.
- **Qualification of examiners and trainers**: It is the Board's responsibility to ensure that the examiners and trainers involved in the certification process have the necessary qualifications and expertise.
- **Establishing the audit guidelines**: The Board establishes the examination guidelines (this document) to ensure that the examinations meet the defined standards. This also includes the type of examination questions, the assessment process and the criteria for passing the examination.
- **Monitoring and quality assurance**: The Board continuously monitors the certification process to ensure that it meets the highest quality standards. This includes regular reviews of the syllabus, the examination guidelines and the performance of the examiners - particularly with regard to up-to-dateness.
- **Complaints management**: A certification board is responsible for the management of complaints. This includes setting up mechanisms to receive complaints, investigate and implement corrective actions when necessary.

Trainer

The candidate can choose a suitable trainer or acquire the competencies through self-study. The I2PM does not certify trainers, but only issues recommendations:

- **Specialist expertise**: Trainers should have extensive specialist knowledge in the field of process management (BPM). This includes an in-depth understanding of BPM fundamentals, advanced BPM concepts, methods and current developments in the industry.
- **Industry knowledge**: An understanding of the specific requirements and practices in different industries is crucial. Trainers should be able to convey BPM concepts in different business contexts and respond to the individual needs of participants.
- **Teaching experience**: Experience in teaching and training is essential. Trainers should have proven methods of knowledge transfer to optimize the participants' learning process.
- **Practical experience**: Practical experience in the field of BPM is an advantage. Trainers who have gained practical experience in the implementation of BPM projects can share

realistic insights and case studies, which enriches the learning process for the participants.

- **Up-to-date knowledge**: Due to the constantly evolving BPM landscape, it is important that trainers have up-to-date knowledge. This can be ensured through continuous training, attending conferences and following industry trends.

Exam organization

The planning, implementation and follow-up of each examination is based on the DIHK's catalog of rules [3].

Before the test

1. Purpose of the exam	Achievement of the learning objectives according to the syllabus and certificate as a "holistic process manager".
2. Language level	Examination languages are English or German; level C1 is recommended but is the responsibility of the candidate
3. Admission requirement	Registration for the examination with the certification body, payment of the fee
4. Examination centers	Examination centers are organized by the examiners. The examination locations will be announced in good time. In addition, a central examination is offered twice a year in Germany.
5. Examination dates	Will be decided and announced by the examiners.
6. Registration	You can register for the exam by sending a message to exam@i2pm.net or by contacting the examiner directly.
7. Decision on admission	Decision of the examiner when participating in a course or decision of the certification body (e.g. according to capacity).
8. Examination fee	The fee is 26.40 euros. This is a cost price for the non-profit institute (certification body).
9. Number of questions and duration of the exam	There are 36 questions, all of which have the same weighting (passed yes or no). The duration of the exam is 45 minutes.
10. Structure of the examination	The examination tasks are set by the Board and are based on the syllabus.

During the test

11. Exclusion of the public	The exam is only open to participants who have registered in advance and have been admitted.
12. Supervision and acceptance	Persons who supervise and conduct the examination must be examiners. Participants must be physically present to take the exam. A virtual exam/online exam is not offered.
13. Identification requirement and instruction	Participants must confirm their identity using official identification document. In addition, the participants are informed in advance about the procedure, the time and about deceptive acts.
14. Unauthorized aids	No aids are permitted in the examination. The use of aids leads to exclusion from the examination. Further consequences may be decided by the Board (e.g. permanent exclusion from the certificate, even retrospectively).
15 Withdrawal, non-participation	The candidate must confirm and justify their non-participation in writing before the examination tasks are announced. The Board may decide on further action.

After the test

16. Evaluation and score	The participant must receive at least ⅔ (24 correct tasks) of the points. After that, the test is considered passed.
17. Awarding of certificates	Upon passing the exam, the participant receives a certificate in German and English. The certificates are sent to the participants within a few days - preferably by e-mail.
18. Failed examination	If the participant answers fewer than ⅔ of the tasks correctly, the examination is deemed to have been failed.
19. Repetition of an examination	The examination can be repeated up to two times. The participant has a blocking period of 10 weeks before the next examination. Each new attempt counts as a new examination, so that all the above provisions apply again (esp. 6 & 8).

Further provisions

20. Confidentiality	Examiners and the Board do not make any statements about the result to third parties; only the validity of certificate numbers can be called up anonymously. Members of the Institute have a duty of confidentiality towards third parties regarding all examination procedures.
21. Objections	Objections to the examination result or other examination procedures can be made no later than four weeks after the examination has been submitted and must be addressed to the Board. The Board will decide on further action.
22. Inspection	Participants may view their examination by submitting a written request to the examiner. Copies or photographs may not be made. Online viewing is not possible.
23 Secrecy	The examination documents may not be passed on to third parties or published by either examiners or candidates (the second only in the exam situation).
24 Copyright	All examination documents are protected by copyright (rights held by I2PM) and may only be used with the confirmation of the Board.
25. Archiving	The examinations taken must be kept for two years.

Exam content

The main component of an examination is the examination questions, which the participants must answer after their training/self-study. The examiners use the answers to determine whether or not the certificate is awarded.

Only closed questions (MC questions) are used in the certification process, in which the participant has to choose between several predefined answer options [4]. The Board considers MC tasks to be very efficient, as large subject areas can be covered within a short period of time [5]. According to the recommendations of [5], a little more than two minutes are allowed for completing a task with four possible answers (one of which is correct). This results in 36 tasks in 45 minutes.

Based on [6], the Board has established the following rules for all MC questions in the certifications, which ensure that the content is only tested stubbornly, but rather that all competencies according to the syllabus (e.g. understanding and interpreting contexts) are also tested:

- **Select forward-looking, relevant topics, problems and actions**: The content of the questions must be significant for practice, the future and further training. Exceptional cases and other trivial content should be avoided.

- **Check at adequate taxonomic levels**: Using concrete applications such as graphs, tables, diagrams, data, quotations, problems, cases, pictures, etc. can avoid a mere retrieval of theoretical facts.
- **Authentically focused questions with homogeneous answers**: Tasks should be presented and formulated as concretely as possible and with suitable applications. The answers must also have a uniform content structure.
- **Clear solution**: Objective answers without opinions must be given. The right answer must be clearly recognizable and distinguishable from the wrong options.
- **Appropriate difficulty**: The level of difficulty of the tasks must be appropriate. If tasks are too difficult, even good candidates will fail. If the tasks are too easy, good candidates can be confused and poor candidates are rewarded.
- **Uniform, clear, concise, simple wording**: The tasks should always be presented in the same style. The wording of the questions and answers should be clear and comprehensible.
- **Avoid unwanted hints**: To avoid giving hints for solving the same or subsequent questions, the answer options, both in terms of language and content, should only ever match the current task. The correct answer should also not stand out visually, for example by being conspicuously longer, shorter or predominantly placed in the middle. The opposite of a correct answer must not be used as an incorrect answer. Parts of a correct answer should not appear in an incorrect answer. Absolutes such as 'always' are not used to turn a correct answer into an incorrect answer.

The Board is also committed to the following quality assurance measures in relation to the exam content:

- **Taxonomy levels**: Examination tasks can be classified by first assigning them to the respective levels [7]. A distinction is made between three levels, as shown in the syllabus. A subdivision into the three taxonomy levels according to [8] is applied.
- **Ongoing monitoring**: The level of an examination is regularly assessed and adjusted over time, depending on the examination results [9].
- **Contents**: All examinations consist entirely of tasks set by the board. Examinations held by examiners as part of a training course at a college/university may contain up to 50% of the college/university examiner's own questions. All rules of examination organization (in particular points and pass limits) apply analogously across all tasks.
- **Quality assurance**: The Board ensures a dual control principle for each individual task.

Using the methods and guidelines presented above, the Board has developed a set of questions for the holistic process manager exam. The questions are based on the main headings of the curriculum and test competencies in a balanced way across the topics. All questions have a single correct answer, which must be selected by ticking a box.

When compiling the examination questions for each candidate, the following breakdown of competencies according to Guilbert's taxonomy levels (K) is roughly observed:

- Approximately 60%: K1 Remembering facts

- Approximately 30%: K2 Interpreting data
- Approximately 10%: K3 Problem solving

Certificate

Upon passing the examination, the participant receives a certificate. The content of the certificate is based on ISO 17024 and includes the following content:

- Full name of the certified person
- Clear labeling (should fulfill the criterion of counterfeiting risks according to [1] through the possibility of consulting the board)
- Name of the certification body (I2PM)
- Reference to the certification program and its contents as short bullet points
- Date of issue
- Validity conditions (no conditions are currently planned)
- Expiration date (no recertifications are currently planned)

Reissues are possible if the candidate requests this from the Board. Regulations 6 & 8 of the examination organization apply analogously.

Sources

[1] DIN e.V. (2012): Konformitätsbewertung - Allgemeine Anforderungen an Stellen, die Personen zertifizieren (ISO/IEC 17024:2012); Deutsche und Englische Fassung EN ISO/IEC 17024:2012, Berlin: Beuth-Verlag

[2] Krieger, Winfried (2020): Webinare- alles ganz anders hier!: So gestalten Sie wirkungsvolle und nachhaltige Webinare, Hamburg: Springer Gabler

[3] DIHK (2015): Regeln zur Durchführung der Prüfung, [online] https://www.dihk-bildungs-gmbh.de/resource/blob/46128/cc166c056772a63965746bd14cbae072/pwd-pruefungsordnung-data.pdf

[4] Walzik, Sebastian (2015): Kompetenzorientiert prüfen: Leistungsbewertung an der Hochschule in Theorie und Praxis, 1. Aufl., Opladen/Toronto: Verlag Barbara Budrich

[5] Thommen, Jean-Paul/Peterhoff, Daniela (2008): Multiple-Choice-Aufgaben zur Managementorientierten Betriebswirtschaftslehre, 2 Aufl., Zürich: Versus

[6] Krebs, R. (2019). Prüfen mit Multiple Choice: Kompetent planen, entwickeln, durchführen und auswerten. Bern: Hogrefe.

[7] Bloom, Benjamin S. (1956): Taxonomy of Educational Objectives. Handbook 1: Cognitive Domain übers. von Füner, Eugen/Horn, Ralf (1972): Taxonomie von Lernzielen im kognitiven Bereich, 4. Aufl., Weinheim: Beltz Verlag

[8] Guilbert, J.-J. (1987). Educational Handbook for Health Personnel (6th ed.). Geneva: World Health Organization.

[9] Roloff, Sighard (2005): Erfolge nachweisen, in: Stelzer-Rothe, Thomas (Hrsg.), Kompetenzen in der Hochschullehre, Rinteln: Merkur Verlag S. 308-342