

Upgrade Assessment to Chartered Member

Preparing for your telephone assessment

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1. INTRODUCTION

The purpose of the Upgrade assessment is to establish if your experience meets the membership requirements for Chartered Member. You'll need to demonstrate your experience by sharing specific examples of your work and clearly showing how they match the membership standards.

This guide is designed to help you prepare for your Upgrade to Chartered Member and give you an idea of what to expect from the telephone assessment.

Before preparing for an Upgrading assessment, ensure you have completed our Pre-Assessment Tool and received confirmation of your eligibility*. For more information on these steps, visit **our website**.

You can then book your Upgrade telephone assessment and start preparing.



2. PREPARING FOR YOUR ASSESSMENT

Before undertaking your assessment you should check that you have received confirmation from the CIPD that you are eligible to Upgrade. You should then ensure you are very familiar with the membership requirements for the grade you wish to apply for. The membership standards for Chartered Member can be found **here**.

The membership standards are taken directly from the new Profession Map – but you won't be assessed on every standard. We have provided more information below on what you'll be asked and what to prepare.

Preparing your examples

We strongly recommend that you prepare your examples in advance and consider the impact of your work. Further guidance of what we mean by 'impact' is given next.

* If you have recently sent your CV for a free review and we've advised that now is a good time for you to upgrade, you do not need to complete the Pre-Assessment Tool and can book your telephone assessment.

You are likely to be asked examples of the following, **from the last five years**:

- ✓ An example of where you've led the development and delivery of a people approach or intervention, and how you aligned and integrated these with other people practices. You'll need to be able to describe how you understood your stakeholders' needs, and the wider organisation culture, processes, systems and structures that you had to take in to account. You'll also need to describe how this work created value for your stakeholders (the 'so what' described below, and what evidence you have of this impact).
- ✓ An example of when you've taken a lead role in planning and implementing change. You'll need to be able to talk about how this work contributes/contributed to the organisation's strategy, and how you used one of coaching, facilitation, consulting or mentoring to support the change. You'll also need to explain how you gave a voice to those impacted by the work, how ethics or values played a role, and the levers you used to create and sustain the change. Finally, you'll need to describe how this work created value for your stakeholders (the 'so what' described below, and what evidence you have of this impact).
- ✓ An example of a difficult decision you had to take, and what evidence you used to make that decision. You'll also need to talk about how you managed any opposition to your approach, and the outcome.
- ✓ How you've built people capability in others, such as developing other people professionals, or building people capability in others.
- ✓ How you've connected with other people professionals over the last year to inform your own thinking.

You will also be asked at the beginning of the assessment to briefly summarise your organisation/client organisations, and the nature of your role.

What we mean by impact

When we refer to the 'impact' of your work, we're talking about the **value your work creates for stakeholders**. This is not the *output* of your work, but *how* your work has met the needs of different stakeholders in different ways.

It's not the 'what', but the 'so what'.

(For example, an *output* of your work might be that you've developed a new approach to performance management. But the *value created* is that managers are now having more focused development discussions, and employees feel the culture is more positive.)

You can evidence this value in two ways:

- **Data and metrics** which show the measurable value. For example: productivity measures, engagement survey results, absence data
- **Other evidence** which demonstrates change has taken place. Such as feedback from focus groups, skills gaps now being met, senior team regularly reviewing performance.

We'd expect most work at Chartered Member levels to use metrics as *part* of measuring impact – but this is dependent on what changes you're delivering. The timescales and scope of the impact we expect to see are:

- Medium- to long-term value for employees and/or organisations – value which is sustained over more than a year. The impact of your work is likely to be both operational and strategic, generated from your wider thinking to change the way things are done. It will affect other people and business practices and impact a wide range of people across the organisation, including customers and colleagues.

You'll need to be able to talk about the 'so what' impact that your work has had, and the evidence you have that demonstrates this. Evidence could include:

- The value created for stakeholders and the scale / scope of this value
- Feedback from key stakeholder groups
- Benefits delivered for stakeholders
- People, organisation, commercial measures (before and after)
- Business indicators or data (before and after)
- Cost savings

You can find some examples of what we mean by impact in the final section of this guidance.

3. YOUR CV

You must submit an up-to-date copy of your CV or **career summary**.

Please ensure your CV includes:

- Employment dates and timeframes.
- Your current role including key accountabilities, responsibilities, achievements and their impact. You need to demonstrate the scope and scale of the projects you have worked on. If you are a consultant, please include information about the roles undertaken/projects covered with the clients/organisations you work with.
- Previous roles and organisations you have been employed by, or organisations you work with as a consultant, particularly focusing on the last five years.

This will help the assessor to establish the context behind the more detailed examples you provide in your telephone assessment.

4. THE TELEPHONE ASSESSMENT

The assessment will last approximately 60 minutes and take the form of a structured conversation, so you'll need to be succinct and clear in the examples you're giving. The questions are designed to help you focus on providing specific evidence against the membership standards, so please use specific examples. Whilst the context of your example is relevant, we suggest you keep this short.

The assessor will usually ask an overall question, then probe for more information as necessary, and ask for further examples where required. You do not need to try and tell the assessor everything – their role is to get the best from you and make sure they ask questions which allow you the opportunity to demonstrate you meet the standards.

If they feel they have enough evidence – or if you are giving evidence which isn't directly relevant to the question being asked – they may stop you and ask a different question. Please don't worry about this, it's just to ensure that the time is being utilised to give you the best opportunity to showcase your experience.

We understand that some of your work may be of a sensitive nature. The information you provide is used only for the purposes of assessing your suitability to Upgrade to Chartered Member only.

Please note: your assessor is based in the UK. However, the telephone system we use to contact you is based in continental Europe, so is likely to come up on your phone as 'international' or 'Germany'.

Hints and tips

- ✓ Make sure you can provide examples from the last five years.
- ✓ Make sure you prepare for the examples outlined in section 2, above.
- ✓ It's really important that the examples are commensurate with the level applied for. So don't just answer the question – make sure the level of complexity, seniority, depth and breadth of your evidence is right for Chartered Membership. **The assessment decision is based purely on the evidence presented within your assessment;** you will not be given the opportunity to provide further clarification if you are unsuccessful.
- ✓ Emphasise your contribution – use 'I' instead of 'we'.
- ✓ **You'll need to demonstrate the impact of your contribution** as described in section 5, above. Whether that's through people and business metrics, or clear evidence of the value you created for stakeholders, you'll need to be clear on what this impact has been. The assessor will specifically ask for business metrics and data as well as other evidence, so please be prepared for this.
- ✓ Whilst preparing you may want to refer back to recent development and / or performance reviews to remind yourself of the work that you've done.

5. Examples of impact

In your telephone assessment you'll be asked to talk about the impact of your work – the 'so what' of the work you've done. We sometimes talk about this as 'the value your work has created'.

Below are some examples of impact and what 'good' looks like. These are examples only – they should give you an idea of how to describe impact and show you the amount of information we expect you to be able to provide.

Example 1:

Output (the 'what'): Employee well-being programme in place

Value created (the 'so what'): Less sickness related to stress; significant shift in culture, driven by directors – more open approach to well-being and mental health.

Evidence for this in metrics: 12% reduction in sick days relating to work stress, saving circa £300k; occupational health appointments averaging 38/year, down from 52/year; attendance at well-being events up 56%.

Other evidence of impact: Organisation messaging can use the government mental health logo on all advertising as an endorsed workplace; well-being champions in place and are stepping in before issues become formal through HR; organisation seen as 'best in sector', we're sharing our programme with other organisations; quotes from employees via the six-monthly survey show a positive response.

Example 2:

Output (the 'what'): New competency framework and role descriptions in place

Value created (the 'so what'): Organisation now able to recruit, develop and manage consistently against a set of behaviours; role clarity provided for 45-strong people team.

Evidence for this in metrics: 45 role descriptions in place; seven new behaviours developed alongside.

Other evidence of impact: all people team JDs now in line with CIPD's new Profession Map and representative of good practice at each level; people team now clear on roles and responsibilities; organisation now able to undertake accurate learning gap analysis, talent reviews and performance management (now being developed against this framework); framework structure for career progression and role creation which can be used for other professions in the organisation.