

Upgrade assessment to Chartered Fellow

Preparing for your telephone assessment

Please note this guidance is valid for all Associate members or Chartered Members who wish to upgrade to Chartered Fellow on or after 30 September 2019.

1. INTRODUCTION

The purpose of the telephone assessment is to establish if your experience meets the membership standards for Chartered Fellow. You'll need to demonstrate your experience by sharing specific examples of your work and clearly showing how they match the membership standards. More information on the levels of membership – and the membership standards – can be found [here](#).

2. ELIGIBILITY TO UPGRADE

You can apply to upgrade if you hold the following:

- **Associate membership** having successfully completed an Advanced Diploma in Human Resource Management or Development or an equivalent, recognised CIPD postgraduate qualification.
- **Chartered Membership** via any route.

3. PRE-SCREENING

If you believe that you're eligible, the first step is to send an up-to-date copy of your CV to upgradecvscreening@cipd.co.uk for review. You may also want to send a copy of an organisation chart which shows your role within the context of your organisation; this is optional. We'll review your CV and contact you to confirm your eligibility and to advise you on how well your experience matches the requirements for Chartered Fellow.

Please ensure **your CV** covers details of the following:

- Employment dates
- The roles you've held and the organisations you've worked for – or clients you've worked with if you're a consultant – focusing particularly on the last five years
- Key accountabilities, responsibilities and achievements for your current and previous roles, focusing particularly on the last five years

4. BOOKING YOUR ASSESSMENT

Once you've had feedback from the CIPD on your eligibility, and advice based on your CV, you'll be able to make a decision on whether to go ahead with your Upgrade assessment. If you want to go ahead, please call our Customer Services team on **+44 (0)208 6208** to book your telephone assessment at a date and time convenient for you. There's a non-refundable assessment fee of £250 to upgrade to Chartered Fellow, which must be paid by credit or debit card when you book your assessment. Please refer to [CIPD's Upgrading Terms and Conditions](#) for more information.

You'll need to make sure you have returned your CV, organisation chart (optional) and colleague feedback (see section 6, below) at least seven days before your assessment, or we may not be able to carry out the telephone assessment.

5. 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 level you wish to apply for. The Chartered Fellow membership standards, 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 below.

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

- ✓ An example of how an organisation's strategy and vision has shaped your work, and the way external influences affect the organisation's performance. You'll need to be able to discuss the organisation's business or operating model, and how this has created value for stakeholders. You'll also need to talk about how you have contributed to the development of this organisation's strategy.
- ✓ An example of when you've developed and implemented a people strategy or strategic people approach which has created long term value for an organisation or the people profession. You'll need to talk about the range of people practices this work drew on, how you aligned it to a range of people and business practices, and the wider implications of your work. You'll also need to talk about the evidence you drew on to make decisions during the development process, and 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 leading role in long term organisation change. You'll need to talk about the levers you used to create sustained change, as well as how ethics or values informed this work. You'll also need to explain how you took the impact on people into account, and how you managed any resistance from senior stakeholders. You'll need to be able to talk about the value your work created, and the evidence that demonstrates this impact.
- ✓ An example of how you've built the capability of people professionals, or how you've contributed to the development of the people profession.
- ✓ How you've connected with other senior people professionals recently, and how this has informed your 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 focussed 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. Eg productivity measures, engagement survey results, absence data
- **Other evidence** which demonstrates change has taken place. Eg feedback from focus groups, skills gaps now being met, senior team regularly reviewing performance

We'd expect most work at Chartered Fellow 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:

- Long-term value for organisations or the profession – value which is sustained over a period of years. The impact of your work is likely to fundamentally change the thinking around people, creating mindset shifts, with a significant effect in the organisation, sector, or profession.

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 / benefits created for stakeholders and the scale / scope of this value
- Feedback from key stakeholder groups
- 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.

6. COLLEAGUE FEEDBACK

You'll need to ask one individual who you currently work with (or have worked with recently) to give an example of your recent work and the impact it's had, to show how you operate at the level of membership for which you're applying. This individual could be your line manager, a senior customer / client within the business (for example, a director, senior business manager)

or, if you are a consultant, a senior client you've recently worked for. Make sure they are someone who can fully answer the question asked and can describe the impact your work has had.

You should ask them to complete the colleague evidence form and ensure it's returned to CIPD at least 7 days prior to your assessment. It should be returned to MemUpgrading@cipd.co.uk.

7. 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 Fellow only.

Please note: your assessor is based in the UK. However, the telephone system we use to contact you is based in 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 5, 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 Fellowship. **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.

8. TERMS AND CONDITIONS

Details of CIPD's Upgrading Terms and Conditions can be found [here](#).

9. AFTER YOUR ASSESSMENT

Your results will be communicated to you within ten working days of the assessment by email. If your Upgrade assessment is successful we are not able to provide any further feedback. If your assessment is unsuccessful, we will provide you with an overview of the reasons why, and any recommendations from the assessor.

10. OTHER INFORMATION

Contact us

If you've any questions, contact our **EA Support team** on **+44 (0)20 8612 6238 (09:00-17:30 UK time, Monday to Friday)**, or e-mail us at MemUpgrading@cipd.co.uk.

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'): Development of reward strategy for the organisation

Value created (the 'so what'): reward approach to deliver business strategy; differentiated approach to drive the right culture; consistency in messaging on the value of our people; appropriate cost savings over the next 10 years which will enable re-investment into our services.

Evidence for this in metrics: Approx. £1.2m to be saved and re-invested over 10 years (on track two years in); commission-based reward generated over £5m more in sales in two years; over 2000 support staff now receiving performance-based rather than cost of living, which has generated 520 additional sales leads over two years.

Other evidence of impact: Creation of culture that generates a sales-driven business; business strategy supported by (and also driven by) approach to reward; employees able to improve their pay; board have given excellent feedback; industry award won for most engaging HR change.

Example 2:

Output (the 'what'): Creation of strategic approach to learning and development, and talent

Value created (the 'so what'): Approach to L&D now enables development of talent pools and performance development plans; supports organisation strategy; critical skills gaps identified and met through compulsory skills-build programmes in key business areas; organisation now able to compete in market for critical skills.

Evidence for this in metrics: £3m budget now assigned to people development (was £800k); 21 business critical-roles have plans to mitigate risk of not being filled; four separate talent pools in place for key business areas.

Other evidence of impact: Three-year budget now planned and assigned to development work; development philosophy and principles in place to use for future people decision making; progression and role creation which can be used for other professions in the organisation; mitigation of risk for business critical roles through succession planning; high potential programme now in place.