

Upgrade assessment to Chartered Fellow

Preparing for your video assessment

Issue 4

Introduction

The purpose of the upgrade 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.

This guide is designed to help you prepare for your upgrade to Chartered Fellow and give you an idea of what to expect from the video assessment.

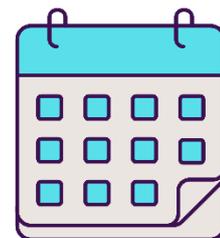
Before preparing for an upgrading assessment, ensure you have completed our Pre-assessment Tool and received confirmation of your eligibility. For more information on these steps, visit [our website](#).

You can then book your upgrade video assessment and start preparing.



Booking your assessment

Before undertaking your assessment, you should check that you have received confirmation from the CIPD that you are eligible to upgrade. You'll then 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)20 8 612 6208** to book your video assessment at a date and time convenient for you. There's a non-refundable assessment fee of £250 to upgrade to Chartered Fellow by this route, which must be paid by credit or debit card when you book your assessment. Please refer to the [CIPD's Upgrading Terms and Conditions](#) for more information.



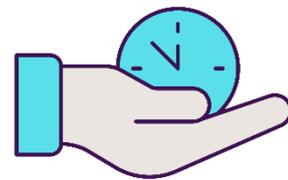
You'll need to make sure you have returned your CV and organisation chart (optional) at least **seven** days before your assessment, or we may not be able to carry out the video assessment.

Reasonable adjustments

If you require an adjustment to the assessment process, including any recent breaks in your career history due to family leave that you'd like to discuss, please call our membership upgrading team on +44(0)20 8612 6238 or email us at memupgrading@cipd.co.uk

Preparing for your assessment

You should ensure you are very familiar with the membership requirements for the grade 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.

At the beginning of your assessment, you will be asked to briefly summarise your current role and organisation (or client organisations), as well as other roles during the last five years. This is so the assessor can gain the additional context they require in addition to what you have provided in your CV. This is intended to be a brief contextual overview as opposed to discussing what you have done in your role.

A structured conversation will follow, where you will be asked to provide examples from your work during the last five years to explore your knowledge, behaviours and impact. It is important when preparing your examples that they fall within the last five years, they are of the relevant scope and complexity at Chartered Fellow level, and that they have been implemented and evaluated so you are able to evidence the impact of your work.

Preparing your examples

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



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

- ✓ An example of how an organisation's strategy and vision has shaped the people strategy, 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 the organisation's strategy.
- ✓ An example of when you've developed and implemented a people strategy or strategic people approach that has created long-term value for an organisation. You'll need to talk about the wider implications of your work and the evidence you drew on to make decisions during the development process, as well as the range of people practices this work drew on and how you aligned these. You'll need to be able to talk about 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 achieve and create sustained change, as well as how ethics

and different ethical perspectives informed your work. You'll also need to explain how you took the impact on people into account, and how you managed resistance or challenge 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, and/or how you've contributed to the development of the people profession.
- ✓ Examples of how you connect with other senior people professionals recently, and how this has informed your thinking.

What we mean by people practices

When we refer to 'people practices', we mean the HR work that you do as part of your people role.

The processes and approaches that you use across the employee lifecycle, which are described within the new Profession Map. For example, recruiting people, managing grievances, analysing people data, carrying out a learning needs analysis, creating talent pools or developing people policies.

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 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 that 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.

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
- 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
- scope and context information about your organisations and roles - size of organisation, number of employees impacted by your work, regions/sites responsible for, who you report to, how many direct reports you have
- key accountabilities, responsibilities and achievements for your current and previous roles, focusing particularly on the last five years. 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.



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

The video assessment

In the assessment, you'll need to provide evidence from the last five years, in the form of specific examples of your work and evidence of the impact your work has had, to showcase how you meet the membership standards. You will be assessed on the way you have already applied your knowledge and behaviours in the workplace.



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. While the context of your example is relevant, we suggest you keep this short.

The assessment will have a strengths-based approach, with the assessor giving you the best opportunity to demonstrate how you meet the membership standards. 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 the assessor feels 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.

Please ensure you are in an appropriate setting to have the video assessment. An area that is quiet, private and allows you the best opportunity to have the assessment conversation is ideal.

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.

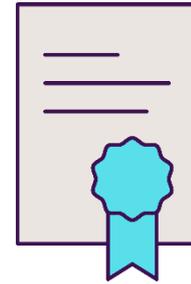
Please note, to ensure consistency of candidate experience, screen-sharing will not be possible.

Hints and tips

- Focus on the context of your organisation and scope of your role in the introduction section.
- Make sure you can provide examples from the last five years.
- Make sure you prepare for the examples outlined in the section 'Preparing for your assessment' 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 Fellow. **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.** 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.
- We expect to see good evidence of your ethical practice and evidence-based decision-making at Chartered Fellow level.
- Keep your examples succinct; it is important all areas are covered in the time allocated for the assessment.
- While preparing, you may want to refer back to recent development and/or performance reviews to remind yourself of the work that you've done.

After your assessment

Your results will be communicated to you within 10 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.



Terms and conditions

Details of CIPD's upgrading terms and conditions can be found [here](#).

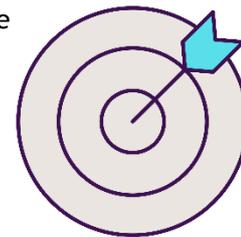
Other information

If you've any questions, contact our membership upgrading team on +44(0)20 8612 6238 (9:00–17:30 UK time, Monday to Friday), or email us at memupgrading@cipd.co.uk

More examples of impact

In your 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 reinvestment in our services.

Evidence for this in metrics: approx. £1.2m to be saved and reinvested over 10 years (on track two years in); commission-based reward generated over £5m more in sales in two years; over 2,000 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 that 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.