

Upgrade assessment to Chartered Member

Preparing for your video assessment

Issue 2

Introduction

The purpose of the upgrade assessment is to establish if your experience meets the membership standards 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 video assessment.

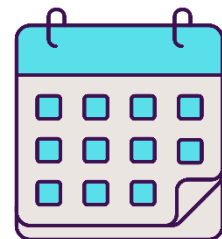
Before preparing for an upgrading assessment, ensure you have completed our Pre-assessment Tool and received confirmation of your eligibility. For more information on these steps, visit [our website](#).

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



Booking your assessment

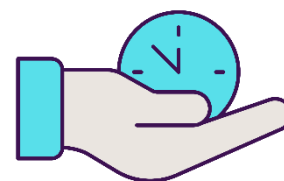
Before undertaking your assessment, you should check that you have received confirmation from the CIPD that you are eligible to upgrade. You'll then be able to make a decision on whether to go ahead with your upgrade assessment. If you want to go ahead, please call our customer services team on **+44(0)20 8612 6208** book your video assessment at a date and time convenient for you. There's a non-refundable assessment fee of £120 to upgrade to Chartered Member 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 Member 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 Member 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 examples 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 where you've led the development and delivery of a people approach or intervention, that has created medium-term value for your organisation, 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, the wider organisational considerations (culture, processes, systems and structures) that you had to take into account, and the evidence you drew on to gain insight. You'll also need to describe and evidence how this work created value for your stakeholders (the 'so what' described below).
- ✓ An example of when you've taken a lead role in planning and implementing medium-term change. You'll need to be able to talk about how this work contributes/contributed to the organisation's strategy, and the value it created for your stakeholders (the 'so what' described below) as well as the levers you used to create and sustain the change. You'll also need to



explain how you gave a voice to those impacted by the work and how you used one of coaching, facilitation, consulting or mentoring to support the change.

- ✓ An example of a difficult decision you have taken as a people professional in the face of opposition. You'll also need to talk about how ethics and values influenced your decision and how you managed opposition to your approach, as well as the outcome.
- ✓ An example of how you've built people capability in others, such as developing other people professionals, or building people capability in others.
- ✓ Examples of how you connect with other people professionals to inform your own thinking. You'll also need to talk about an example of insights you have gained 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 Member level 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/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 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 that 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 Member only.

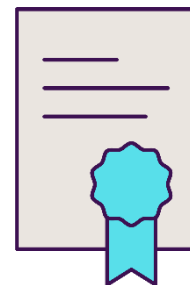
Please note, to ensure consistency of candidate experience, screen-sharing will not be possible.

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 Member. **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 Member 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

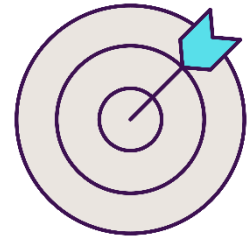
Details of CIPD's upgrading terms and conditions can be found [here](#).

Other information

If you've any questions, contact our membership upgrading team on +44(0)20 8612 6238 (09:00–17:30 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'): employee wellbeing programme in place.

Value created (the 'so what'): less sickness related to stress; significant shift in culture, driven by directors - more open approach to wellbeing 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 wellbeing events up 56%.

Other evidence of impact: organisation messaging can use the government mental health logo on all advertising as an endorsed workplace; wellbeing 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 job descriptions now in line with the 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.