CIPD

Experience Assessment

Candidate guidance pack

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Section 1: Introduction

This pack is designed to guide you through Experience Assessment and help you achieve the level of membership you're applying for.

In this pack you'll find:

- a step-by-step guide to compiling a successful application
- hints and tips for each stage of the process
- the Experience Assessment timeframe.

You'll also find useful references linking you to our website for further information.

Section 2: How the membership standards are assessed

1. Specialists and generalists

The membership standards are relevant to people professionals in all sorts of roles, whether you're a generalist or a specialist. If you work in a particular specialism, you should think about the standards in the context of the area in which you work e.g. employee relations or learning and development (L&D). It's likely that you'll use examples which draw on your area of specialism, but we expect you to demonstrate a holistic knowledge of the wider people profession, and how different areas of the profession interact with – and impact – each other.

2. How the standards link to the new CIPD Profession Map

The membership standards are taken directly from the full standards in our new Profession Map. You'll be expected to demonstrate your knowledge of people, work and change as described inthe core knowledge areas of the new Map, and your approach to your work as described in the core behaviours.

While you may be a specialist, we're not assessing your knowledge as described in the specialist knowledge areas of the Map.

Section 3: Step-by-step guide to completing Experience Assessment

1. Familiarise yourself with this candidate guidance

This guidance gives you information on what's involved, what's assessed, and how long Experience Assessment takes. Please spend some time reading through it before you begin yourassessments.

We recommend you spend some time reviewing **the standards** for the level of membership you're applying, as all your assessments will be assessed against these. You can also find useful video guides and FAQs in the guidance and support area within the Experience Assessment portal.

Please contact our **support team** on **+44 (0)20 8612 6238** (09:00 – 17:30 UK time Monday to Friday), or alternatively you can e-mail us at **ea@cipd.co.uk** to tell us of any special requirements or reasonable adjustments you'd like us to consider in order to complete your Experience Assessment.

2. Plan your time

Experience Assessment is limited to a total of **eight weeks**, so you'll need to allocate enough time in your diary to complete and submit your assessments within this timeframe. We recommend you plan regular blocks of time to compile and submit your assessments (as opposed to doing them in a few sittings, working a whole day at a time).

As a guide, it should take around five days in total to complete all the written assessments, so please allow yourself sufficient time. It can be easy to underestimate how much time you might need,especially when life is busy. Make sure you plan in plenty of time to think about which examples to use for which questions, find any supporting evidence, write up your answers, and read any resources we direct you to.

Please also ensure that you've given enough time for your colleagues/clients to submit their stakeholder feedback. Make sure they know the deadline for your submission.

If you don't submit your assessments within the allocated time, you'll need to restart your application and, where applicable, pay the assessment fee again.

3. Set a date for your Professional Discussion

We'll contact you to agree a date for your Professional Discussion, which will be held over video link where possible. We'll also allocate you an assessor to conduct your discussion.

We'll contact you within 10 working days of you receiving access to the Experience Assessmentportal to arrange your Professional Discussion. If you've any questions, please contact our support team on **+44 (0)20 8612 6238** or email us at **ea@cipd.co.uk**

4. Start your assessments

You'll have **eight weeks** to submit your **knowledge and impact report, behaviour report** and **your Professional Development report** (which includes your **stakeholder feedback**) via the Experience Assessment portal. Your eight weeks will start from the day you receive your registration confirmation email, which is sent to you on the day you request to start your Experience Assessment.

Please refer to **section 5** for further details on each assessment.

5. Submit your assessments

You can complete and submit your assessments in any order – as long as you submit them within thespecified timeframe. **Please make sure you're happy with your assessments before submitting them. Once you've submitted an assessment, you won't be able to withdraw, amend or delete it.**

6. Professional Discussion (PD)

Your PD will take place three to six weeks after you submit your assessments. It'll be conducted, where possible, via video link, for example Skype/Zoom (or equivalent).

Please see **section 6** for guidance on how to prepare for your PD.

7. Your results and outcome document

You'll receive an email alert once we've uploaded your outcome and outcome document to our Experience Assessment portal.

Your outcome document will be available six weeks after your PD. Please ensure you download/print a hard copy of your document within two years of its upload.

Please be aware that we'll retain all data from your Experience Assessment submissions and final outcome document for two years following completion of the process. You'll be able to access and download your full assessment documents during this time. After two years, all submissions and personal data will bedeleted from the Experience Assessment portal. We will, however, archive a copy of your final outcome document only for a further five years. Should you wish to gain a copy of this during that time, please contact our support team at **ea@cipd.co.uk** After **seven years** from completion of the Experience Assessment process, all documents will be deleted from the Experience Assessment portal.

Please refer to our **privacy policy** for more information on how we process and store your personal data to comply with General Data Protection Regulation (GDPR).

Section 4: Checklist

This is a checklist for you to refer to as you progress through your assessments. We've made some recommendations of timings to help you plan. However, this checklist is a suggestion only; youmay prefer to work differently or adjust timings depending on your work and personal commitments. **Don't underestimate how much time you may need to draft and finalise your questions.**

Week 1

Read through this guidance.

Read through and familiarise yourself with the different assessments on the Experience Assessment portal.

Familiarise yourself with the resources within the Experience Assessment portal for yourknowledge and impact report, and plan in time to review them.

Use the Experience Assessment portal to invite your stakeholders to complete their feedback.

Put regular blocks of time in your diary to complete the assessments.

Weeks 2-3

- [ ] Brainstorm which work examples you could use for your knowledge and impact report and behaviour report.
- [ ] Decide which examples to use for each question.
- [ ] Allocate time to draft and write up the knowledge and impact report questions over the next two to four weeks.
- [ ] Allocate time to draft and write up the behaviour report questions over the next two to four weeks.
- [ ] Complete the reflection on your learning section within your Professional Development report.
- [ ] Complete your strengths and development areas section within your Professional Developmentreport.

Weeks 4-5

- [ ] Draft your answers to the knowledge and impact report questions.
- [ ] Locate the supporting evidence that you'll attach to your knowledge and impact report.
- [ ] Draft your answers to the behaviour report questions.

Weeks 6-7

- [ ] Finalise all your responses to the questions.
- [ ] Check if your stakeholders have submitted their feedback.

Week 8

- [ ] Read through all your assessments before submitting them.
- [ ] Make sure your stakeholder feedback has been submitted.
- [ ] Print off copies of your assessments ready for your PD.

Prior to your Professional Discussion(PD)

- [ ] Reread your assessments to remind yourself of what you submitted
- [ ] Refamiliarise yourself with the resources on the Experience Assessment portal that you used for your knowledge and impact report
- [ ] Remind yourself of the membership standards and prepare further examples of the work you'vedone and its impact

Section 5: Your online assessments

8. Knowledge and impact report

The knowledge and impact report looks at your knowledge of people, work and change, and how you've applied this knowledge to create value for your stakeholders. It assesses the **membership standards** which are taken from the new Map, so you may want to refer to these.

The knowledge and impact report is divided into sections:

1. Your knowledge and how you apply it.
2. Providing supporting evidence.
3. Names of people who can support your evidence.

1. Your knowledge and how you apply it

The examples you provide in your knowledge and impact report should be:

- taken from the last five years
- demonstrating the impact your work has had at the level you're applying for
- from an organisation you've worked for (or with if you're a consultant).

Each question has a word count associated with it. Don't worry if your examples are just under this word count, but anything too short is unlikely to be suitable. Likewise, don't exceed the word count foreach section, as anything over and above an additional 10% of the word count won't be assessed.

You can use different projects or pieces of work to show how you meet the membership standards. Depending on the nature of your work, you might have two or three pieces of workwhich cover several questions, or you might need to draw on a variety of examples.

Any question referring to your organisation can refer to your current organisation, an organisation you've recently worked for or, if you're a consultant, a client organisation.

There are some questions which refer you to resources – this could be an infographic, video, podcast, report or other information. The question will then ask you to reflect on that resource. We strongly recommend you review the resources before answering the question. You may also need to draw on your own understanding and thinking to answer the question fully. We've provided a link to the resources in the question, but there's also a 'resources' tab at the top of the Experience Assessment portal where you can access them. If a question asks you to reflect on acurrent or future work issue and you're currently not in work, you should choose an issue you've faced in the past.

There are also **two larger questions which specifically ask you to detail the impact of your work**– one focused on people practice* (or people strategy for Chartered Fellow) and one focused on change. Make sure you use examples which best demonstrate the impact your work hashad. You'll also need to attach supporting evidence of your work for these two examples – see the next page for more details. Please don't use the same example for both questions.

(The exception to this is at Chartered Fellow level where you may have developed a wide people strategy, and also led a significant change piece within that strategy.)

*When we talk about **people practice**, we mean people processes and approaches used in HR,L&D and OD, and other people specialisms.

What do 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 isn't 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 performancemanagement. 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 eg productivity measures, engagement survey results, absence data
- **other evidence** which demonstrates change has taken place eg feedback from focus groups; skills gaps being met; senior team regularly reviewing performance; having performance reviews enabling the talent team to identify high potential individuals.

We'd expect most work at Chartered Member and 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:

- **Associate Member**: short- to medium-term value for employees and/or your organisation –value which is sustained over a few months or more. The impact of your work is likely to be operational, changing the day-to-day people approach for customers, clients or team.

- **Chartered Member**: 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.

- Chartered Fellow: 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 changethe thinking around people, creating mindset shifts, with a significant effect in the organisation, sector, or profession.

In the final section of this document we've provided some examples of what impact might look like at each level.

1. Providing supporting evidence

This section of your knowledge and impact report asks you to provide evidence demonstrating the work you've done and the impact it's had. The evidence **relates to two specific questions in the report**; we've made it clear which questions this applies toin your assessment.

It's up to you what to submit. We're looking for evidence that best showcases the work you've delivered in those two examples, and the impact it's had. You should include a minimum of one document and a maximum of six documents. Examples of evidence you may want to submit are:

- evidence of the impact of your work (such as KPIs, metrics or the wider value created)
- plans
- presentations
- reports
- policy documents.

Accepted file types include Word, Excel, PowerPoint, PDF and images (gif, jpeg and png).

2. Names of people who can support your evidence

In this section of your knowledge and impact report you'll be asked to name two individuals who are able to corroborate your work and the impact you've had.

You can name your line manager, clients or colleagues (eg senior managers or project sponsors) to verify your knowledge and impact report. If appropriate, you can name the same individuals selected to complete your stakeholder feedback. You don't need to tell us which pieces of work each individual can corroborate.

Please note we may contact the individuals to verify the information.

Hints and tips

- Familiarise yourself with the resources and start completing the knowledge and impact Report as soon as possible. Keep a copy handy so you can add examples as they occur to you.
- Talk to your line manager, colleagues and customers/clients about yourwork. They're often best placed to identify areas of your work that's had the best impact.
- Refer to your recent development and/or performance reviews to remind yourself of the feedback you've received and the work you've done.
- Identify the role you played in a project or piece of work each time.
- Keep referring to the membership standards.
- Make sure you fully address each question.
- Only pick examples that allow you to fully answer the questions. You might want to test a fewout with a colleague before deciding on the right one.
- Be specific with the examples you provide, and, where possible, use examples of work you've completed. This'll ensure that you've fully answered questions about impact.
- Avoid using acronyms or internal speak.
- Where questions refer to resources, make sure you read the resource provided on the Experience Assessment portal first – but also draw on your own thinking and understanding when answering the question.
- Use the Experience Assessment portal to submit your supporting documents.
- When you upload your supporting evidence, you'll be asked to list each document out. Please make sure you clearly describe which example each piece of evidence relates to.
- Avoid using large zip files to upload multiple documents.
- If it helps, you can combine a few short, related pieces of evidence into onesupporting document.
- Refer to your supporting documents wherever appropriate but keep these brief and relevant.
- Make sure all supporting documents are in English.

We respect your confidentiality

The information you provide will only be used as part of your application for membership. We understand that some of the projects/work you discuss, and use as evidence, may be of a sensitive nature. Please feel free to remove sensitive information,such as the names of people, or information deemed commercially sensitive.

9. Behaviour report

In your behaviour report you'll be asked to provide examples of your recent work to show how you meet the behaviour standards for the level of membership you're applying for. Your examples will need to be taken predominantly from the last five years. The behaviour report assesses the membership standards taken from the Map so you may want to refer to these.

One of the questions focuses on ethical practice. Please note for **Chartered Member and Chartered Fellow level** only, ethical is a term which is often subjective. We recommend you use the following as a definition to guide your response:

- actions/decisions/behaviours in line with the law or the organisation's values
- actions/decisions/behaviours which apply ethical values (fairness, honesty, openness,integrity).

You may find our factsheet on ethical practice useful:cipd.co.uk/knowledge/culture/ethics/role-hr-factsheet

Hints and tips

- Read the behaviour report and start completing it as soon as possible. Keep a copy handy so you can add examples as they occur to you.
- Discuss the questions with your line manager and colleagues. They're often best placed to point out the good examples of your work.
- Refer to your recent development and/or performance reviews to remind yourself of the feedback you've received and the work you've done.
- Keep to the word count. Don't worry if your examples are just under, but anything too short is unlikely to be suitable. Likewise, don't exceed the word count in each section as anything over and above an additional 10% of the word count won't be assessed.

10. Your Professional Development report

Your Professional Development report has three assessments:

1 Reflection on your learning
2 Your strengths and development areas
3. Stakeholder feedback – to be completed by two stakeholders of your choice

This report will also be used to think about your future professional development.

1. Reflection on your learning

This is to understand more about your ongoing development as a people professional, which is part of our requirement for membership. It's where you tell us about your development experiences and learning, and the way they've impacted your practice.

When we talk about 'development experiences and activities', we mean any learning you've experienced. It could be formal learning such as a webinar or training, or a collaboration session you've been a part of at work. It may be something you've read, or a discussion with colleagues or your wider network or collaborating with peers at a conference. Or it could be learning you've had as part of your role, such as leading a new approach to people practice, research, or in-depth learning about new sectors when working with new clients.

2. Your strengths and development areas

We're also interested in your perspective of your strengths and areas for development. In this section you'll be asked to select three areas of strength and three areas for development from our core knowledge, core behaviours and specialisms. You'll can also tell us why you've made your selection. Please note we're not assessing specialisms, but it's useful for us to know where you feel your strengths and development areas lie as part of your ongoing professional development.

3. Stakeholder feedback

You'll need to ask two people you work with to provide feedback on the impact your work has had, and your strengths and areas of development. This should take no longer than 45 minutes for your colleagues to complete.

We recommend that one of the people you select is your line manager. If this isn't possible, please choose an appropriate replacement – such as someone at a similar level who has a good understanding of the people profession and your work. The second individual should be a colleague or client you work closely with. You'll need to use the Experience Assessment portal to invite your colleagues/clients to support yourapplication. They'll then submit their evidence via the Experience Assessment portal themselves.

Don't worry – we'll provide them with guidance once they've accepted your invitation.

Please allow enough time for your colleagues/clients to submit their evidence; make sure they know the deadline for your submission. It may be a good idea to ask them to complete it a couple of weeks before the deadline, so you have some contingency. Stakeholder feedback will not be shared with you in full, but we'll use their feedback to inform the assessment. We may share strengths and development areas with you, where appropriate, in the PD and the outcome document.

Hints and tips

- The people you choose may be a mix of people professionals, business managers and clients..
- They need to be available during the eight-week timeframe to complete the feedback on time. Make sure they know the deadline for your submission.
- Once you've identified the two people, please contact them as soon as possible to see if they're willing to provide feedback. This will give them the maximum possible time to completetheir submission.
- It should take around 45 minutes to complete.
- It's your responsibility to make sure we receive all stakeholder feedback, but we'll keep you informed if we're still waiting for any to arrive.
- It's okay to use the same people named in your knowledge and impact report, if they're the best people to provide this feedback.

Section 6: Your Professional Discussion (PD)

Your PD will be conducted where possible via video link (eg Skype, Zoom orequivalent) with an assigned assessor. The PD will assess you against the membership standards of the level you're applying for.

The PD will take place three to six weeks after the deadline for completing your online submissions. Please remember you'll need to be able to speak to your assessor in **private, with no distractions, so you may want to book a suitable room beforehand.**

It should last approximately **two to two-and-a-half hours**. However, we'll schedule three hours to allow for some flexibility. The purpose of the PD is for the assessor to give you thebest opportunity to demonstrate how you meet the standards.

The format of the PD will be a structured conversation. The assessor will ask about your career and follow up on some of the examples you've provided in your written assessments. They're also likely to ask for additional examples of your work. There'll be a focus on the value your work has created so we strongly recommend that you're able to explain the impact of your work on employees, the organisation or the profession (section 5 has more information on what we mean by impact, and in section 8 you'll find some examples of impact.). Some of the questions will be competency-based – for example, 'Tell me about a time when…'

You don't need to tell the assessor everything you know,and everything you've done! The assessor's role is to help you share your range of experience, so they'll lead the conversation and make sure you have the best opportunity to showcase yourwork against the membership standards.

11. Hints and tips

- Spend time preparing for your PD. Your assessor will be interested in your work and the impact of your work – not everything you know about the people profession.
- Remind yourself of the **membership standards** and be prepared to provide more examples of your work to show how you meet them.
- Review your knowledge and impact report, your behaviour report, and your professional development report. Be prepared to answer more questions about them. It's also an opportunity to expand on the evidence you've already shared in these submissions to ensure a clear understanding.
- You may also wish to revisit the resources we've directed you to within the Experience Assessment portal as part of the knowledge and impact report.
- Take your submissions and any additional notes and examples with you to use during thePD.
- Your assessor will only consider examples of work outside of the five years under exceptional circumstances. So, make sure you have examples of impact at the right level within this timeframe.

Section 7: Results and outcome document

We'll upload your outcome document to the Experience Assessment portal six weeks after your PD. You'll receive an email alert once it's available.

Your outcome document will:

- include the outcome of your application for membership
- recommend next steps to support your continuous professional development (CPD).

If successful, you'll be awarded the level of membership you've applied for. You'll be sent the relevant membership card and certificate approximately six weeks after receiving your outcome document.

Please ensure that you download/print your document within two years of it being uploaded. Please see section 3 for more information on how we process and store your personal data to comply with General Data Protection Regulation (GDPR) requirements.

Section 8: Other information

12. Examples of impact

In both your knowledge and impact report and your PD 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 good examples of impact. They should give you an idea of how to describe impact and show you the amount of information we expect you to provide.

Please note: some of the outputs described could be at different levels – for example, a new induction approach could be work that's performed at both Associate and Chartered Member level. It's the **knowledge and behaviours** that sit behind that work (including the level of complexity and thinking involved) – as well as the **impact** the work has – that determines the membership level.

Associate level

Example 1:

Output (the 'what'): change to our induction process.

Value created (the 'so what'): new starters are happier, staying longer; managers now know what to do when someone joins; this approach benefits other HR teams.

Evidence for this in metrics: 20% increase in retention for new starters; cost savings on re-recruitment circa £6k in four months.

Other evidence of impact: training team is identifying skills gaps early on and feeding into wider training plan; employees report they have clarity on expectations of their role in the first few months; the induction buddying programme is being extended to one year; positive feedback quotesfrom probation reviews; my manager has asked me to do the same for our approach to absence.

Example 2:

Output (the 'what'): new flexible working policy.

Value created (the 'so what'): employees able to have a better work-life balance; supports the mitigation of the risks of our long-hours culture.

Evidence for this in metrics: no drop in organisation performance measures since implementation; 15% of employees have put in a request since implementation a year ago - all approved.

Other evidence of impact: Employees using the policy report a better work-life balance; fewer complaints about working hours being dealt with by HR; senior team now discussing wider wellbeing issues; managers report from 1:1s that individuals with flexible working arrangements are more engaged with their work.

Chartered Member level

Example 1:

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 our 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 performancemanagement (now being developed against this framework); framework structure for career progression and role creation which can be used for other professions in the organisation.

Example 2:

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 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.

Chartered Fellow level

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; appropriatecost 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 members of the workforce now receiving performance-based rather than cost of living, generating 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 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 L&D 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 areas; organisation now able tocompete 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; mitigationof risk for business-critical roles through succession planning; high potential programme now in place.

13. We respect your confidentiality

The information you provide will only be used as part of your application for professional membership. We understand that some of the projects/work you discuss, and use as evidence, maybe of a sensitive nature. Please feel free to remove sensitive information, such as the names of people, or information deemed commercially sensitive.

14. Contacting us

If you've any questions, head to the guidance and support area within the Experience Assessment portal, where you'll find our FAQs and video guides as a starting point.

Or please contact our support team on +44 (0)20 8612 6238 (09:00-17:30 UK time, Monday to Friday), or email us at ea@cipd.co.uk