

# Assessor Guidance Notes

## Introduction

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This document provides guidance and support to assessors of Registered Consultancy membership applications.

### Inclusions

The guidance notes have headings that match those on the checklist. For each section, these notes include:

- The action you need to carry out.
- The questions on the checklist you need to answer in that section.
- Guidance.

### Conflict of interest

If you have a conflict of interest in carrying out any assessment, you must let CIEHF admin know immediately, so the assessment can be re-allocated to another assessor. A conflict could be that you work with or are related to the main contact or one of the consultants, or you have some other, perhaps commercial, interest in the application.

### Data confidentiality and protection

All documents relating to an application are confidential, must be kept as secure as possible and must not be copied or shared, except between CIEHF admin and assessors. The vast majority of applications will consist of electronic files which should all be deleted once an assessment has been completed and application finalised. Paper records should be destroyed. You are bound in these regards by signing a Non-Disclosure Agreement.

CIEHF Admin will keep records of applications for a time as specified in their data protection policy.

## Guidance Notes

Before you start, you should be familiar with the information on the CIEHF website concerning Registered Consultancies at [https://www.ergonomics.org.uk/Public/Awards\\_Accreditation/Consultancies.aspx](https://www.ergonomics.org.uk/Public/Awards_Accreditation/Consultancies.aspx).

You should also note the requirements of the PAB Rules available from the CIEHF website at [https://www.ergonomics.org.uk/Public/About\\_Us/CIEHF\\_Documents.aspx](https://www.ergonomics.org.uk/Public/About_Us/CIEHF_Documents.aspx).

### Stage 1: Application preparation

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*Actioned by: applicant*

A complete application will consist of the following documents:

- The application form.
- Detailed CVs of the consultants.

*Actioned by: CIEHF Admin*

- Confirm the current grade of the main contact.
- Check all relevant CVs have been included.

### Stage 2: Assessment

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*Actioned by: Assessor*

Throughout the assessment, enter Yes or No to the questions on the checklist and enter comments to substantiate your responses. This is especially important where you find issues with the application. Doing this should also help you to formulate your overall decision about whether or not to accept the application.

#### Consultancy expertise

**ACTION:** Review each consultant's CV against the expertise and proficiency they have claimed.

**Q1 & 2.**

**GUIDANCE:** Is there evidence in the CV that each consultant has specific expertise at the proficiency level claimed? If you are unsure, you should ask for additional information, such as a report, to back up the claim.

**Q3.**

**GUIDANCE:** Is there evidence that each consultant has specific experience in the sector claimed?

#### Consultancy CPD

**ACTION:** Review the CPD activity table.

**Q4.**

**GUIDANCE:** Do the activities show that consideration has been given to both the consultancy services and individual consultants professional development needs? You should take into account the total number of consultants in the consultancy.

## Consultancy profile

**ACTION:** Visit the consultancy website and review the information about the ergonomics and human factors services offered.

**Q5 & 6.**

**GUIDANCE:** Overall, do you consider that the consultancy could deliver the expertise claimed?

## Stage 3: Feedback & Decision

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*Actioned by: assessor*

**ACTION:** Add your final comments and feedback to the checklist, together with your decision whether to accept the application or not.

**GUIDANCE:** Your feedback should always be informative, useful and constructive, even if your decision is to decline the application. The feedback should be a helpful part of the journey to a successful application.

The options for your decision are:

**Accept:** If your decision is to accept the application as it stands, you should choose this option. You need not add any further comments.

**Discuss:** If you have enough information but before you give your decision, you would like to discuss one or two points about the application with the other assessor, select this option, and detail the discussion points on the checklist.

**More information:** If you would like more information from the applicant before you make your decision, choose this option. You should add sufficiently detailed feedback to ensure the applicant can understand what you need, *including reference to the specific area of expertise*. Please take time to read back over your feedback as if you were the applicant. Is it clear and unambiguous? This is the area where there are most issues, when the applicant is given the feedback but then asks for more detail as to what the assessor is looking for.

**Decline:** If you cannot accept the application even with further information, then your decision should be to decline the application. You should give detailed feedback for the applicant as to how and why you came to this decision, and what they might do in the future should they wish to re-apply.

In all cases, once you have completed the checklist and have reached your initial independent decision, you should email the form back to CIEHF Admin at **membership@ergonomics.org.uk**

If one or both assessors have selected 'Discuss', you will be asked to contact each other and come to an agreed decision.