

Assessor Guidance Notes

Introduction

This document provides guidance and support to assessors of CIEHF Fellowship 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.

CPD

Note that Fellowship applications now require the submission of a CPD record as part of the application. In order to assess eligibility for Chartered status, this record should be included as part of the assessment. The exception to this is if the applicant is already a Registered Member with Chartered status, in which case they do not need to submit a CPD record with their application.

Conflict of interest

If you have a conflict of interest in carrying out any assessment, you must let the CIEHF Membership Team know immediately, so the assessment can be re-allocated to another assessor. A conflict could be that you have worked with, or are related to the applicant, 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 securely and must not be copied or shared, except between the Membership Team and assessors. The vast majority of applications will consist of electronic files which must all be deleted once an assessment has been completed and application finalised. Paper records must be destroyed. You have agreed to this by signing the CIEHF's Non-Disclosure Agreement.

The Membership Team will keep records of applications for a time as specified in the CIEHF's GDPR policy.

Guidance Notes

Before you start, you should be familiar with the information on the CIEHF website concerning Fellowship at <https://www.ergonomics.org.uk/membership/fellow/>. All applicants would have been advised to read this page including the FAQs at the end, before applying.

You should also note the requirements of the PAB Rules available from the CIEHF website at https://www.ergonomics.org.uk/about_us/ciehf_documents/.

Stage 1: Application preparation

Actioned by: applicant

A complete application will consist of the following documents:

- The application form
- Professional competency list
- 3 referee reports
- A detailed CV
- A publications list (optional)
- Up-to-date CPD submission

Actioned by: CIEHF Membership Team

- Confirm the current grade of the applicant and whether they have graduated from a CIEHF Qualifying Course or not.
- Confirm whether or not the applicant is currently Chartered.
- Check that at least one of the referees is a Fellow and that one of the referees is not employed by the same organisation to the applicant.
- Confirm membership criteria if applicant is of an equivalent professional grade in another IEA Federated Society (see list at <https://www.iea.cc/about/council.html>).

Stage 2: Assessment

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 will help you to formulate your overall decision about whether or not to accept the application.

Knowledge, Experience & Responsibilities over the last 10 years

ACTION: Review the knowledge and experience outlined in the application form, CV, Professional Competency list and any other supporting material, paying particular attention to length and type of experience.

Q1-Q6.

GUIDANCE: The applicant should have at least 10 years' full time (or part time equivalent) professional work experience in the practical application of ergonomics, and/or teaching, and/or research of ergonomics relevance. The applicant's employment record should show significant career progression and increase in professional responsibilities.

If the applicant is not already a Registered Member, special note should be made of the following:

- Teaching or research must be as part of a multi-disciplinary team and include practical applications.
- The applicant's experience must be in applied work.
- Mentored ergonomics work experience gained by graduate applicants following the award of their Qualifying Course degree may be included, subject to the Mentor's comments.
- Applicants are required to supply five pieces of evidence and these should demonstrate breadth across all five professional competency areas.

If the applicant is already an equivalent professional member from another IEA Federated Society, the Membership Team will have checked that the relevant application criteria matched or exceeded the CIEHF criteria for Registered Membership. If this is the case, then the applicant's competence should be taken as if they were a Registered Member of the CIEHF.

Note there is no requirement for an applicant to have practiced in more than one sector provided they have demonstrated knowledge and competence in practice across the breadth of the discipline.

Q5.

GUIDANCE: See the full list of Professional Competencies in Appendix 3. You should look for evidence of appropriate proficiency and application across all five Professional Competencies, based on the application form, CV and any other evidence submitted.

1. Ergonomics / human factors principles
2. Ergonomics / human factors theory and practice
3. Human capabilities and limitations
4. Design and development of systems
5. Professional skills and implementation

You would expect to see at least a level of proficiency across *all* competencies between 'Intermediate' (level 3) and 'Expert' (level 5). The evidence supplied by the applicant should cover all competencies and specifically back up any 'Expert' levels of proficiency claimed and reflect their seniority in the profession.

Senior Professional Responsibility

ACTION: Review the knowledge and experience outlined in the application form, CV and any other supporting material paying particular attention to the levels of senior professional responsibility.

Q7.

GUIDANCE: The applicant should provide evidence of senior professional responsibility (SPR) for a period of at least 5 years within the 10 year period of experience.

Applicants can select from a range of skills and abilities that they may have exercised in delivering their professional performance. The examples of professional attributes given below are intended as a guide and do not preclude other forms of SPR. The evidence presented must be explicit and convincing and must include at least four of the following:

- a. Team or capability group leadership and mentoring within an ergonomics context.
- b. Significant resource management responsibilities; say, at least £300k per year.
- c. A leading role in managing, developing and delivering approved ergonomics courses.
- d. A leading role in initiating, developing and managing medium and / or large projects, and delivering their outcomes.
- e. Taking the lead in initiating and managing research programmes.
- f. The active promotion, development and growth of ergonomics within an organisation, to ensure it is an integral part of processes, products and activities rather than just a tick in a box.

- g. The planning of ergonomics interventions to major industrial or public sector programmes (say, >£5m) and the control of their progress and outcomes.
- h. Being familiar with the technical language used by those with different professional backgrounds to work effectively in multidisciplinary projects and programmes.
- i. Interpretation and/or adaptation of ergonomics standards and specifications to particular applications and situations.
- j. The development, modification and validation of new or existing tools, techniques or methods to enhance an ergonomics activity or application.
- k. Identifying and meeting end user needs in organisational outputs or products.
- l. Any other examples of SPR.

Referees

ACTION: Review the referee reports.

Q8-Q9.

GUIDANCE: The applicant's referee reports should show explicit and convincing support based on demonstrable knowledge of the applicant's career, including experience and achievements. The reports should show insight into the applicant's professionalism, attitudes and motivation towards ergonomics and human factors. Watch out for simple repetition of the applicant's CV.

CPD

ACTION: Review the CPD record, if submitted.

Q10-Q11.

GUIDANCE: The CPD record should cover 5 activities over a 12 month period immediately prior to the date of the application. For the assessment, you should look for demonstration of appropriate (in terms of scope and variety) and substantial (in terms of depth and quality) professional development with respect to learning, practice (i.e. work undertaken), and planned development. You should judge whether the skills and knowledge acquired during the year has been sufficient to show the applicant has kept up-to-date.

The applicant should detail in the CPD description what they did, reflecting on what they learnt and how it improved their professionalism. Their forward plan should show 3 activities that at least demonstrate maintenance of competence and proficiency.

CPD activities could include:

- Presentation of research, learning from experience and/or findings from practical or applied ergonomics at seminars or conferences.
- Publication of a book, article or text that is used across the industry in support of ergonomics.
- Communication of learning, teaching or mentoring of others in ergonomics.
- Contribution to the development of standards or best practice documentation.
- Contribution to the activities of the CIEHF.
- Interaction with other strategic thinkers within their community of expertise or across CIEHF membership.

Additional information

ACTION: Review the additional information.

Q12-Q13.

GUIDANCE: Look for professional recognition and particular involvement with the Institute's activities and the wider community.

Summary

Q14.

ACTION: Go back to the start of the application form and review the summary.

GUIDANCE: Has the applicant made an effort to support their claim for eligibility, bringing their application together into a sound argument? This should not just be a list of the contents of their application but a coherent commentary that paints a picture of their professional development and achievements.

Stage 3: Feedback & Decision

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: The Membership Team will use your comments to feed back to the applicant, so 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 should always add a comment so the applicant gets some positive feedback for the effort they have made in compiling their application. For example, you could highlight, say, three particularly good parts of their application. You might also comment on anything that could be further improved, such as CPD entries, but please detail how it might be improved.

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, this will be used by The Membership Team to gather more information. 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: Applications may be declined for a number of reasons including:

- Insufficient breadth of knowledge or experience.
- Insufficient evidence for competence claims.
- Insufficient support from mentors or referees.

One of these may not be reason in itself to decline an application and further information should always be sought before a decline decision is made.

If you cannot accept the application even with further information, then your decision should be to decline the application. You should give detailed feedback as to how and why you came to this decision, and what they might do in the future should they wish to re-apply. This information will be fed back to the applicant by The Membership Team.

Note: For quality purposes, a Decline decision by both assessors will trigger a review of the application and decision by the Topic Lead. If the Topic Lead is one of the assessors, the Deputy Topic Lead will be asked to carry out the review.

Assessment completion

Once you have completed the checklist, email the form back to the Membership Team at **membership@ergonomics.org.uk**.

The Membership Team will then take the necessary next steps. If one or both assessors have selected 'Discuss', you will be asked to contact each other and come to an agreed decision.

Please note that the completed Assessor Checklist may be shared with the applicant.

Please also note that once the final decision by the assessors has been reached, the assessor feedback is compiled into an Assessment Summary Report which is sent to PAB members for final ratification. This is a final check to ensure that assessors are in agreement and that the decision appears fair, based on the feedback of both assessors. So please ensure your feedback is clear and unambiguous and backs up your decision.