

Assessor Guidance Notes

Introduction

This document provides guidance and support to assessors of CIEHF Technical 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 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 CIEHF 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 their data protection policy.

Guidance Notes

Before you start, you should be familiar with the information on the CIEHF website concerning Technical Membership at https://www.ergonomics.org.uk/Public/Membership/Technical_Member.aspx. 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/Public/About_Us/CIEHF_Documents.aspx.

Stage 1: Application preparation

Actioned by: applicant

A complete application will consist of the following documents:

- The application form
- Professional Competency list
- Referee reports
- Log book (6 - 12 entries)
- Documents as evidence of experience (minimum 5)
- Qualification certificates

Actioned by: CIEHF Membership Team

- Enter the total time covered by the applicant's log book

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

Referees

ACTION: Review the referee reports.

Q1-Q2.

GUIDANCE: Are the referee's comments sufficiently supportive of the applicant and is there evidence that they know the applicant and their work well enough to support the application for Technical Membership? For example, have they had a period of working with or supervising the applicant?

Log book

ACTION: Review the content of the log book

Q3-Q5.

GUIDANCE: The log book should contain details of a minimum of 6 and a maximum of 12 projects or activities. The examples of work undertaken in the log book should be relevant and give some evidence of self-reflection and personal development. Each record should comprise:

- Brief summary with detailed documentation as an appendix, if appropriate.

- Discussion of the salient components of ergonomics involved.
- Description of the outputs from the work.
- Details of how this work demonstrates the applicants approach to ergonomics and human factors.

The total time spent by the applicant on those projects must be a minimum of 200 days over a minimum 2-year period

Separate details should show any formal training or education received. Each record need not exceed one page, with text deployed economically (e.g. use of bullet points, compact sentences, etc.)

In the comments part of the checklist you need to briefly summarise why the log-book and supporting material confirms the applicant's fulfilment of the criteria (one or two sentences will normally be enough).

Knowledge & Experience

ACTION: Review the knowledge and experience outlined in the log book.

Q6 to 9.

GUIDANCE: The applicant should have at least 2 years' experience carrying out ergonomics and human factors as a significant part of the job role.

Q10.

GUIDANCE: The application form contains the full list of Competencies under each area. There should be a minimum of 23 competencies covered (i.e. a competency has a proficiency level of 1 or above). You would expect to see a proficiency level between 3 - 4 in the main identified area of expertise, with levels 1 - 4 in the other competency areas claimed:

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 should look for evidence of appropriate application of the Professional Competencies based on log book entries, reports and any other evidence submitted. The log book should indicate which entry addresses which competency.

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, 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 constructive feedback as to how and why you came to this decision, and what the applicant should do to meet the criteria should they wish to re-apply. This information will be fed back to the applicant by the Membership Team.

Please indicate your level of confidence in your decision. If you have come to a different decision than the second assessor and at least one of you is less than confident in the decision, we will ask you to discuss the application with the second assessor. If a joint decision can't be reached, the application and the assessments will be reviewed by the PAB topic lead and a final decision made.

NOTE: Assessor's feedback to the applicant

Please write your feedback to the applicant as if you were addressing them directly. For example:
Do say: 'Your application was well constructed, but please provide more detail for log book entry 1'
Don't say: 'The applicant needs to provide more detail on log book entry 1.'

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.