Guidance for upgrading to Chartered Fellow via written assessment

Preparing for your Upgrade Assessment

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The purpose of the Upgrade Assessment is to establish if your experience meets the membership standards for Chartered Fellow. 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 will help you prepare for your written assessment to upgrade to Chartered Fellow. It'll also give you an idea of what to expect from the online assessment.

Before you start

Before preparing for an Upgrade Assessment, make sure you've:

- Completed the Upgrade readiness checker
- Received confirmation of your eligibility via email

For full details on the process visit our website.

Reasonable adjustments

If you need adjustments to the assessment process, including considerations for recent career breaks due to family leave, please contact our Membership Upgrading team:

Phone: +44(0)20 8612 6238

Email: memupgrading@cipd.co.uk.

Membership standards

Make sure you understand the membership requirements for the grade you're applying for. Here's the Chartered Fellow membership standards.

The membership standards are taken directly from the Profession Map – but you won't be assessed on every standard. We've provided more information below on what you'll be asked and what to prepare.

We advise that you download and review the requirements carefully and make notes of the types of knowledge and behaviours that are expected at this level. You should think about and prepare some examples of where you've demonstrated this knowledge, these behaviours and impact. You may find it helpful to refer to these notes when writing your submission.

How to prepare your application

When completing the written assessment, you'll need to provide specific examples from the last five years. These examples should clearly demonstrate your work and its impact. You can use experiences from your current or recent employment, or your work as a consultant.

Your application will be assessed on the way you've applied your knowledge and behaviours in the workplace.

The questions are designed to help you focus on **specific evidence** that meets the membership requirements. The bullets under each main question are a guide to writing your response. **We strongly recommend you follow them and address each element** to keep your answers focused.

For each question, please include:

- Timelines for the work you're referring to
- Which employer they relate to
- Be clear about what your role was, what you did and what the outcome was, particularly in terms of the impact on the business. Just as you would for a competency based interview.

Each question carries a word limit (shown in italics at the bottom of each question). Anything over this amount will not be assessed (this is to ensure fairness to all applicants).

You need to be succinct and clear in the examples you provide. While the context of your example is relevant, we suggest you keep this short and focus very specifically on what you did, and what the outcome was.

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 application to upgrade to Chartered Fellow. You should remove sensitive information from your submission, such as names of individual staff.

We recognise that many candidates use AI tools to support with structuring or drafting written work. You may use AI in this way if you choose.
However, your submission must reflect your own professional experience, judgement and understanding. You remain fully responsible for the accuracy, relevance and authenticity of what you submit.
As part of quality assurance, we review submissions in line with our AI policy.

Hints and tips

- Make sure you provide examples from **the last five years.**
- Make sure your examples match the level applied for - consider **complexity, seniority, depth, and breadth**. The decision is based only on what you present within your assessment; if unsuccessful, you won't get a chance to clarify later.
- Don't try to tell us everything you know about HR or L&D. Please **ensure your response addresses the specific question**. The bullet points under each main question should guide your answer, so make sure you cover all questions asked within your responses.
- **Check your word count** before submitting your application - anything over the statedword count will not be assessed to ensure fairness to all applicants.
- Emphasise your contribution - use 'I' instead of 'we'.
- **Clearly demonstrate impact**, whether through people and business metrics, stakeholder value, or other measurable outcomes.
- Show ethical practice and evidence based decision making at the Chartered Fellow level.
- Refer to recent development or performance reviews to refresh your memory on key examples.
- If you choose to use AI tools, think of them as a way to support how you present your ideas, experience, rather than to create examples which are not based on your experience. Your submission should be grounded in your own role, experiences and professional judgement, with clear examples that demonstrate what you have done and learned.

Send us your CV

Send an up-to-date CV or career summary with your application to **memupgrading@cipd.co.uk**.

This is essential as it gives assessors the context to understand your examples and their impact. It also helps you present your evidence effectively at Chartered Fellow.

How to prepare your examples

What we mean by people practices

'People practices' refer to the work you do as part of your people role. This includes **the processes and approaches used across the employee lifecycle**, as outlined in the Profession Map.

For example:

- Recruiting people
- Managing grievances
- Analysing people data
- Carrying out a learning needs analysis
- Creating talent pools
- Developing people policies.

What we mean by impact

'Impact' refers to the **value your work creates for stakeholders** – not the output of your work.

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 impact in two ways:

- **Data and metrics** that show the measurable value. For example: productivity measures, engagement survey results, absence data.
- **Other evidence** that demonstrates change has taken place. For example: feedback from focus groups, skills gaps now being met, senior team regularly reviews performance.

We'd expect most work at Chartered Fellow 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:

- Long-term value for employees and/or organisations. This means value that is sustained over a period of years. The impact of your work is likely to fundamentally change the thinking around people (think of it as a 'mindset shift'), with a significant effect on the organisation, sector, or profession.

You'll need to explain the 'so what' - the impact of your work and provide evidence, such as:

- 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.

More examples of impact

Below are some further examples of impact and what 'good' looks like. These serve as guidance to help you frame your responses and understand the level of detail expected.

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.
- Appropriate cost savings over the next 10 years which will enable reinvestment in our services.

Evidence for this in metrics:

- Approx. £1.2m will be saved and reinvested over 10 years (on track two years in).
- Commission-based reward generated over £5m more in sales in two years.

- Over 2,000 support staff now receiving performance-based salary increases, rather than cost of living increases, 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) strong 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 learning and development 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 business areas.
- Organisation now able to compete 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 that can be used for other professions in the organisation.
- Mitigation of risk for business-critical roles through succession planning.

- High-potential programme now in place.

Other information

Terms and conditions

Please refer to the CIPD's Membership Upgrade terms and conditions.

Support

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.