



# Professional Review Guidance

**Assessment Criteria for candidates through the Industry Route**

# Introduction

Chartered Membership of the CIOB puts you on a path of career advancement that leads to the very top of the profession. Progress is made through a combination of study, examination and experience culminating in Chartered Membership and the designation MCIOB.

You are now at the final stage towards your Chartered Membership, these guidelines are designed to explain what you will need to demonstrate and examples of the type of evidence you can provide to satisfy the requirements of the review.

**We wish you success with your application.**

# Continuing Professional Development

Continuing Professional Development, or CPD, is any learning that adds value and enhances your occupational knowledge and skill. It supports individual development and the upkeep of professional competence. This could mean honing current skills, it could mean developing them to a new level, or it could mean learning new ones. Attending relevant events, conferences and seminars, reading magazines and websites or researching new products and innovative methods can all contribute to CPD.

As a CIOB member, you agree to complete CPD in each subscription year to comply with Rule 10 of the Rules and Regulations of Professional Competence and Conduct.

The CIOB remains committed to providing members with appropriate learning content free of charge, as part of their member benefits. Find CPD through the CIOB Academy. Your local hub will also provide CPD events.

From 2023 all members will undertake a number of development activities with a focus on ethical practice as set out in the policy. Various development activities will accrue points. These could be attending events, conferences and seminars, reading magazines and websites or researching new products and innovative methods, as well as upgrading your membership or doing formal courses.

**[Please visit the website for more information.](#)**

What CPD information do you need to include with your Professional Review Application?

If you have been in membership for more than 1 year you will need to provide CPD records for the previous year.

At the final page of the Professional Review application, you be asked to provide a one year forward plan for CPD.

# Maintaining the Integrity of CIOB Chartered Qualification

The CIOB takes the integrity of the Chartered qualification very seriously. It is a mark of achievement and demonstrates to others your professionalism and commitment to high ethical standards.

The five core values of Academic Integrity are:

**Accuracy** – making sure that your work is free from errors.

**Honesty** – being truthful about what you have done and achieved.

**Fairness** – not trying to gain an advantage by unfair means: for instance, by passing off others' work as your own.

**Responsibility** – taking an active role in your own learning: for instance, by seeking out the information you need to study effectively.

**Respect** – for your fellow members and the standards of CIOB.

The PR is about your personal experiences and a demonstration of your competence. All candidates need to understand the importance of upholding ethical standards.

## **Unacceptable Practices**

CIOB has to ensure that all our potential members meet the standards of competence. The PR report is your opportunity to demonstrate your competence. The following actions are regarded as malpractice and against the ethical standards CIOB maintains.

**Collusion** The application should be completed by yourself and not in collusion with others.

**Copying** from another candidate or existing members who have already completed the process.

**Impersonation** and purchasing the services of others to write your report.

**Use of Generative AI** to produce examples of work that you have not carried out or for the embellishment and or exaggeration of examples that you have carried out.

**Inclusion of inappropriate**, offensive or discriminatory material within your report.

## **Identification of Unacceptable Practices.**

CIOB uses Plagiarism software called Turnitin to identify plagiarism, copying and the use of AI. Turnitin stores applications and checks new submissions against past submissions and indicates where work has been taken from other sources (including Generative AI content). Where there are concerns about the validity of an application which has achieved a pass, you will be provided with the Turnitin evidence and an interview will take place. You will be required to discuss your examples in more detail and satisfy the panel the application is based on your own experiences. The result of the interview is either a pass or a defer.

For further information regarding the Rules and Regulations of Professional Competence and Conduct, please visit the website: [Royal Charter | CIOB](#)

# How to apply

**For direct applicants only.**

**If applying through a PR Support Provider, please deal directly with them.**

Please note: we can only process applications which include all the documents listed. Your application will be delayed if anything is missing.

This part of the process depends on how long you take to act on the advice of the PR Advisor.

## **Step 1**

Upload your application to the portal and pay the assessment fee.

## **Step 2**

You will receive an acknowledgment of receipt.

## **Step 3**

A PR Advisor will pick up your application and check all documents have been received.

## **Step 4**

Only when all fees are paid, all documents are received and the report is checked by a PR Advisor can the application move to the assessment process.

# The assessment process

**Only when an application is complete will it enter the assessment process.**

## The Process

Once submitted, your application goes through the following stages.

The PR Advisor will let you know when your application is in the assessment process.

### Stage One

Your application is assessed by a CIOB assessor in accordance with CIOB assessment procedures.

### Stage Two

Your application is moved to the internal verifiers, to ensure the assessment has been made in accordance with the CIOB assessment procedures.

# The competence report

To meet the requirements of the Professional Review, candidates will have to demonstrate knowledge and application in all three of the following areas of competence:

### Occupational Competence

### Management Competence

### Commitment to Professionalism

The competencies are organised into sections, evidence and verification by employer/verifier together with guidance on the conditions under which competence must be achieved. This should be based on work experience and not modules or courses you have studied on this subject.

**The application must be typed and all boxes must be completed making best use of the space available.**

# Do

- ✓ **Read the Professional Review Guidance and Assessment Criteria for Candidates** before completing the report. Our experience shows that people who use the guidance have a better chance of passing first time.
- ✓ **Give 1 or 2 clear, specific and detailed examples** of the competences from your own practice. Use first person and past tense.  
**Use the CARL format:**
  - Circumstance – Describe the circumstance you needed to act on.
  - Action – Describe the action you took. Why did you choose this action?
  - Result – Evaluate the result of your action/decision including the positives and negatives.
  - Learning – Outline any learning you took from this experience.
- ✓ **Include reflection and evaluation**, where you can, on practice indicating of how you would do things differently. You can include the view of others, if it helps.
- ✓ **Use all the space provided** to its fullness to describe and evidence your competence. Only what is visible inside the text box can be assessed. If a scroll bar appears in any text box your response will need to be reduced. The PR Team will send the report back to you if the text flows outside of the visible text box area. Font size 11 required.
- ✓ **Keep self-evident comments** like 'Health and Safety is important to the organisation...' or 'Planning and organisation is crucial for the smooth running...' brief. It is good to have an opener to a section but too much of this language starts to sound like generalisations. It is the personal examples we are looking for.
- ✓ **Be honest** about what you have achieved. The assessor is not looking for prestigious multi-million pound projects. They are looking for evidence of competence, the ability to understand the limits of one's competence and responsibilities, the ability to make ethical decisions and the commitment to learn and develop.
- ✓ **Do check for spelling and grammatical errors.** The PR Team will send the report back if it is clear your report has not been proof read.

# Do not

- ✘ **Don't write 'we do this at...'** or 'we follow company...'. Too much of this suggests you are not working on your own initiative.
- ✘ **Don't list your job responsibilities** or your job description.
- ✘ **Don't describe company policies** e.g. at my company we do... The assessor wants to know about you and your practice. You may refer to policies that inform your practice.
- ✘ **Don't assume** just because you have worked on large projects or prestigious sites that this confirms competence.
- ✘ **Don't exaggerate** or misrepresent your experience and responsibilities as you may be questioned about it.
- ✘ **Don't use bullet points.** It suggests you cannot fill the boxes with 2 substantive examples.
- ✘ **Don't use company specific acronyms** without mentioning the full title at some point in your report.
- ✘ **Don't provide additional documents**, which we do not mention in this guidance. They will not be included in the submission for assessment.
- ✘ **Don't send your documents in the paper format;** they need to be provided to us electronically.
- ✘ **Don't send your application handwritten**, this is a professional report and must be completed electronically.



# Instructions to complete your professional review application

## Step 1

You will need to be an applicant (or ICIQB/ACIQB. Please check qualifications before applying) membership before you submit your PR application.

Please contact Customer Services for information about this step if you are not already a member. Or apply online for Applicant membership - <https://portal.ciob.org/>

<https://www.ciob.org/customer-services>

## Step 2

You will need to complete 2 documents

### A Membership Declaration

A Membership Declaration needs to be signed and returned with your PR Report.

### PR Application Form (the report template)

- **Summary of your Career** – This is a brief description of your career so far. Include milestones and achievements.
- **Job Description** – Briefly describe your current role and responsibilities. There are 2 other boxes, the roles of who do you report to and who reports to you. In this box it is simply subcontractors or team of 6, it can be very brief. If you consult or work alone then please leave these boxes blank. This part is not assessed, it provides the assessor with an understanding of your job role.
- **Project List** – You only need to include the projects that are mentioned in your report. Remember any projects mentioned must have been worked on within the last 3 years. To describe the project, keep it simple and brief i.e. office refurb, Blossom High School – New Build, Town hall maintenance. And finally, your role while you worked on the project.
- **Your Report** – This where you demonstrate your competence in all areas. Remember to use your Guidance Notes to ensure you cover all the criteria for each section.
- **1 Year Forward Plan** – This is about a CPD action plan for the coming year. What you like to do to improve your knowledge and skills?

# Requirements & examples

The PR assessors will assess that you are competent to carry out the work of a qualified Chartered Builder or Chartered Construction Manager. To be competent is to have the knowledge, skills and behaviour to perform a job properly.

CIOB members have drawn up the competencies to be applied across different construction disciplines. The competencies have been grouped under the following themes:

## **1. OCCUPATIONAL COMPETENCE**

## **2. MANAGEMENT COMPETENCE**

## **3. COMMITMENT TO PROFESSIONALISM**

Interpretation should be made carefully and the choices given in your application should be examples of the work and judgement you have applied. The assessors will take into account sensible and realistic choices reflecting the skills needed to fulfil your role.

The reason most people do not pass their PR first time round is because they do not include specific examples of activities they have carried out. Providing a generalised description of what you do is not enough. The response should demonstrate what you have done.

You will find the Marking Descriptors useful for understanding how the assessors make their assessments.

There is a Table of Competencies further on. The criteria is explained in a different way which you may find useful.

# Examples

**It's better to have two clear examples that follow the CARL format rather than lots of unexplained examples.**

Your examples should be current, reflecting the past 3 years of work experience.

In exceptional circumstances, we would accept an example going back to 5 years. Your application form has an explanation of the conditions.

**The following report examples have been provided to help applicants structure their report.**

## Example 1

Quality is determined by the specification and contract drawings. To manage quality of the project I firstly read the specification and look at the drawings so that I can devise a quality plan to ensure that the end product will be fit for purpose to the clients requirements.

Quality control is more a matter of defect detection and I carry out inspections each day to ensure that the product is right first time to reduce the time required for snagging. Doing these inspections and having and defects rectified immediatly also saves time and cost in the long term.

I also employ the services of the local authority building control who send out an inspector at certain intervals of the build process and signs the work off at each of the stages, e.g. dpc level, roof structure. This ensures that the build is built to current building regulations. I do this to ensure that the completed projects meets the specification and reduces client complaints as well as to improve the reliability of the work and products and reduce cost.

During the inspection I record the progress with photographic evidence and catalogue my findings on a quality control inspection form which is then filed and can be recalled at a later date if required. This is something that I have just implemented into my work as I had an issue on my last project where a defect occured and I could not prove who was at fault (quite an expensive learning curve).

I also ensure that any pipework installed is pressure tested prior to being filled as a leak can have serious consequences to the programme especially after being plastered. I also carry out checks for the correct tolerances to measurements and levels to ensure that they all comply with current regulations.

**This could have been improved by providing a more specific example.**



**For example, this is considered a GENERALISED description.**



**Instead, use a SPECIFIC example**

On the local school site I carried out inspection each day to ensure the quality is right first time. On one day, the list included several areas where I felt the quality of the work carried out could be better. I worked with the contractors to ensure the work was re-done. On this site the local authority Building Inspector also attended at various stages of the project. This ensured that all regulations were being followed. I discussed quality issues with the inspector which led to a better product. This saved cost and time in the long term.

## Example 2

On recent project where I was working as a Project Manager and Technical Advisor. The project was a school and I was responsible for monitoring progress and quality against programme and design. I worked with the Clerk of Works to monitor the internal and external finishing. I ensured that issues were captured in the Clerk of Works report and are raised and recorded during the monthly meetings. Anything of urgency was communicated by telephone and followed up with an email.

The Client, funder and end users were made aware of quality concerns and the contractor provided solutions to rectify the concerns quickly. One particular concern was associated with the aesthetics of the brickwork to the first 1.5m of the build.

As the building was located in a flood zone, the first 1m of the brickwork had to be flood resilient, requiring two different mortars. This created a strong delineation in colour within the brickwork. This was picked up during one of the first progress meetings and was unacceptable to the client. I then discussed options to remedy the concerns including tinting, raking out and re-pointing with different mix and doing nothing.

Thinking about the long-term implications of each option in terms of maintenance, cost and programme effects, we agreed that once the cladding was installed it may refocus attention away from brickwork and with the clients agreement, this was agreed and reviewed after 4 months. After 4 months it was clear that once the external façade had been completed the mortar difference was no longer as obvious and its impact on the appearance was minimised. No further work was required.

The co-operation of Client and the Contractor was achieved through regular updates and good communication. This built up a level trust between all parties. This trust element was important in ensuring a quick fix reaction was avoided and a long term view was taken.

**This is a real example although some details have been changed and removed.**

**This a better example for the following reasons:**

- Specific examples
- Written in past tense – What has happened not what might be done
- Written with CARL format in mind
- Reflection and evaluation included

**This is considered a SOLID description. See marking descriptor.**

# Marking descriptors

Marking Descriptors help you understand what our assessors are looking for. For example if you do not include an example or have weak content this will put you in the Defer band. A generalised description or an example which has insufficient relevant content may put you in the question or interview band.

## Aim for blue

### Good pass

Solid competence indicated, with reflection

Candidate gives a range of very good examples that demonstrate a deep understanding of the competence as reflection on practice and evaluation of the effectiveness of actions.

### Pass

Range of examples/solid experience demonstrated

The candidate provides a good example/s that demonstrate that he/she is competent within the parameters of the job role. The candidate demonstrates that he/she has solid experience.

### Question or interview band

Narrow scope with relevant example to substantiate competence

The candidate demonstrates an understanding of the subject area and has given 1 or more examples which are relevant to the subject area and provides narrow scope that includes a relevant example.

Some but insufficient relevant content with basic/weak example(s)

Candidate has provided an example which is not relevant to the competence or does not meet the criteria for a Chartered Construction Manager

### Defer

Weak content, no example/s, such as Job Description or process

Candidate has not provided an example/s, the candidate refers to a process, the content is weak or is just a job description

No relevant content including out of time - nil - only to be used if an assessment cannot be made due to the time the example occurred

# Seeking Support

**CIOB know how important it is to have the right support available for candidates. Here are the options available to you.**

- **CIOB Mentoring Service:**  
We offer a Professional Review Mentoring service as part of your Qualified and Experienced Pathway, supporting Mentees working towards completing their Professional Review. Find out more about the [Mentoring Service here](#).
- **Local workshops:**  
Take advantage of the Professional Review workshops often hosted by local hubs. Find your local hub [here](#).
- **PR Support Provider:**  
A network of trusted individuals and organisations, who support and encourage you every step of the way, from an initial assessment to submission. A full list of Providers can be found on the website.
- **Additional Support:**  
Reasonable adjustments and Special Considerations (RASC). If you require additional support, such as dyslexia, please refer to the RASC policy on the website.  
[www.ciob.org/membership/professional-review](http://www.ciob.org/membership/professional-review)

# Competence report

## Section 1 - Occupational competence

This section incorporates 5 areas of competencies. All examples used must be current and valid. Assessors will be looking for specific detailed examples that demonstrate your competence.

This section has the highest weighting.

### 1.1 Planning and Organising Work

You must provide workplace evidence of how well you plan, programme, organise and monitor your work activities, systems and methods, based on specific projects or tasks.

Your response must include specific evidence of how well you identified and set objectives, how you measured performance against the set objectives, how well you managed the team to work collaboratively and identified skills required to benefit the project.

### 1.2 Managing Health, Safety and Welfare/Wellbeing

Demonstrate your understanding and responsibility for health & safety, and compliance with current legislation. Describe your experience and application of processes related to welfare/wellbeing issues and working practices.

By using examples from your own experience, identify the principal hazards or breaches of rules (or potential hazards or breaches) in your work place and demonstrate your actions in removing or mitigating the associated risks.

The assessor will take account of the different environments in which these criteria can be applied e.g. site-based, office-based, consultants, academia etc. and will apply judgement accordingly.

### 1.3 Managing Quality

Demonstrate your competence in evaluating the quality of a specific product, service, or process by providing good examples where the required or expected standards were not being achieved, and explain your actions to remedy, rectify or improve them.

Demonstrate your competence of managing client or user satisfaction, quality assurance processes and procedures.

## 1.4 Sustainable & Environmental Practices in Construction

Provide workplace evidence to demonstrate your awareness and involvement in best practice in the operation of sustainable construction.

Use examples to demonstrate your understanding of sustainable development and legislation, including other sustainable communities, environmental impact and innovation; and include environmental legislation and other controls appropriate to sustainable construction development and your role.

## 1.5 Knowledge of Commercial, Contractual and Legal Issues

Demonstrate your awareness and involvement in construction law, civil law or insurance practice relevant to your job role. This should include examples of specific contracts in which you have had experience of contractual obligations and negotiated contracts, relevant to your job role.

Use examples to demonstrate awareness of the commercial impact of your decisions and actions.

Your examples must show your ability to communicate effectively with clients, consultants, senior management, stakeholders or other relevant personnel regarding commercial, contractual and legal issues.

# Section 2 - Management competence

You will be expected to provide examples of projects or processes you have been responsible for, ensuring all the following areas are addressed in terms of your role with regard to the planning, implementation, monitoring and evaluation.

The assessor will be looking for evidence to explain how your role and competence has evolved to equip you with key management skills in all of the following areas:.

## 2.1 Communication

Use specific examples to demonstrate your ability to communicate effectively with a range of stakeholders relevant to your job role. Examples should include reference to a range of different communication channels.

Indicate the ways in which you adapt your communication style taking into account different parties.

## 2.2 Decision Making

Use specific examples to demonstrate your ability to investigate problems or potential problems, analyse possible solutions, implement your chosen solution and then monitor and evaluate the effectiveness of that solution.

The problems or issues could be technical, organisational or interpersonal.



## 2.3 Managing Information

Use specific examples to demonstrate your ability to manage information including control documents in a range of situations, including at source, flow and dissemination to relevant parties.

Demonstrate how you identify and access information relevant to your role.

Provide examples when the information you required was incorrect or missing/unavailable and explain your action(s) to remedy this for the specific instance and for future error/omission correction.

## 2.4 Leadership and Strategic Management of a plan

You must provide examples when you developed, contributed to or have an awareness of a project or other strategic/financial plan that demonstrates how you managed, monitored, evaluated that plan. Include how you manage risk, procurement, cost and cost control, finance, time and production in relation to that plan.

## 2.5 Developing People and Teams

Use specific examples to demonstrate how you have developed or managed a team or professional relationships within your role.

Include reference to:

- identifying learning needs
- negotiating a learning plan
- appraisals and performance management

This can relate to yourself or to others..

## 2.6 Innovation

Use specific examples to demonstrate how you have introduced and implemented innovative solutions, systems or processes that have resulted in influencing time, cost, safety or other benefits to your organisation or project.

Your examples should demonstrate how you have used solutions attained through external sources and previous experience and transferred or adapted them to the benefit of your organisation, project or task.

## Section 3 - Commitment to professionalism

In this section you are required to demonstrate your knowledge and understanding of the role and significance of the CIOB and its functions. You should also show an appreciation of your personal professional role and the public expectations of a professional and the CIOB Code of Conduct and Member regulations. The assessor will be looking for evidence to support the following competencies:

### 3.1 Professional Judgement and Responsibility

Based on your own experience, you should describe in detail an occasion or an incident that has required you to exercise your professional judgement.

In this section, your professional judgement relates to an occasion or an incident where it may be regarded as beyond your normal sphere of activities in your role and where you were challenged because of the situation you faced and the consequent ethical decision you were required to make.

The purpose of this section is to ensure that members of the CIOB apply appropriate standards of professionalism to their duties based on CIOB Rules and Regulations of Professional Competence and Conduct, and their duty of care.

#### Indicative examples

- Identify a situation where professional judgement was required and how it was demonstrated. (Issues could be behavioural, contractual and may include reference to members of the public).
- Demonstrate process for applying appropriate criteria when exercising professional judgement (e.g. by reference to the Rules and Regulations of Professional Competence and Conduct).
- Identify involvement with making decisions that protect the general public.
- Display knowledge of personal limitations (e.g. when to seek advice from others).

### 3.2 Commitment to abide by the Rules and Regulations of Professional Competence & Conduct

Demonstrate using examples from your experience of how, in your role, you function within an ethical framework.

Ethics is at the heart of professional integrity, requiring honesty and respect for the rights of others. It may extend beyond skills, experience and adherence to rules/standards.

Please refer to the following link in relation to more information regarding ethics in our Rules & Regulations:

<https://www.ciob.org/about/who-we-are>

### 3.3 Commitment to Continuing Professional Development

You should show an understanding of the importance of CPD in your role, as this CPD is a mandatory requirement for membership, by providing evidence that you carefully evaluate, plan and implement a range of industry-focused activities to show how they meet your current and future needs.

Demonstrate your role in encouraging CPD in others and your awareness of its importance in developing the construction industry.

#### Indicative examples

- Identify how you have reflected upon achievement or lack of achievement.
- Evaluate training and development activities.
- Demonstrate where and how you have encouraged others in the organisation to undertake CPD activities.
- The benefits of CPD within your job roles.

# Table of Competencies

## Occupational Management

Remember your examples should be past examples, what have you done not what you are doing. Writing in the first person and past tense always helps

Section	Title	Key Criteria	Have your examples included the key criteria
	<b>SECTION 1 – OCCUPATIONAL COMPETENCE</b>		
1.1	Planning and Organising Work	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Planned, organised and monitored work activities and methods</li> <li>b. Set objectives and measured performance</li> <li>c. Built team relations to carry out the work planned including identifying training needs within the team</li> </ul> <p>Think about an example(s) of when you have managed a team to meet the organisational or project objectives.</p> <p>If you do not manage a team, think about an example(s) of when you have managed your own work activities to meet organisational or project objectives.</p>	
1.2	Managing Health, Safety and Welfare/ Wellbeing	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Identified your job responsibilities and practices under Health, Safety and Welfare legislation</li> <li>b. Identified hazards and assess risks arising from workplace activities</li> <li>c. Applied welfare/wellbeing and working practices</li> </ul> <p>Think about an example(s) that includes when you have identified risks, breaches and how you dealt with the situation.</p> <p>Everyone has some responsibility. You need to think about what you do in your job role.</p>	

Section	Title	Key Criteria	Have your examples included the key criteria
1.3	Managing Quality	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Evaluated the quality of a product, service or process</li> <li>b. Worked to improve the product, service or process where it does not meet required standards</li> <li>c. Managed client/user satisfaction, QA processes and procedures</li> </ul> <p>Think about an example(s) that includes when you identified a quality issue with a service, a product or process.</p>	
1.4	Sustainable and Environmental Practices in Construction	<p><b>This section is about showing:</b></p> <ul style="list-style-type: none"> <li>a. Your contribution to sustainability at any stage of the project lifecycle</li> <li>b. Your contribution to sharing best-practice and innovation in sustainability</li> <li>c. How you apply standards and legislation</li> </ul> <p>Think about an example(s) that includes how you have applied sustainable construction to your job role. What legislation do you comply with and how?</p>	
1.5	Knowledge of Commercial, Contractual and Legal Issues	<p><b>This section is about showing:</b></p> <ul style="list-style-type: none"> <li>a. Knowledge and understanding of construction, civil law or insurance practice</li> <li>b. An understanding of the commercial impact of decisions and actions</li> <li>c. Communication with clients regarding commercial, contractual and legal issues</li> </ul> <p>Think about an example(s) that includes when you used construction law or insurance practice. What commercial decisions have you made and why? What communication did you have with your clients?</p>	
<b>SECTION 2 – MANAGEMENT COMPETENCE</b>			
2.1	Communication	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Adapted communication styles to the audience</li> <li>b. Used a range of communication media channels</li> <li>c. Communicated with a variety of stakeholders</li> </ul> <p>Think about an example(s) that shows a range of communication methods and how you adapt your style of communication to suit your audience or different stakeholders.</p>	

Section	Title	Key Criteria	Have your examples included the key criteria
2.2	Decision Making	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Identified and investigated problems</li> <li>b. Analysed possible solutions</li> <li>c. Implemented, monitored and evaluated the effectiveness of the solution</li> </ul> <p>Think about where you needed to find a solution to a problem. What investigations did you undertake, what were the solutions and analyse why you chose your solution? Finally, how did you implement, monitor and evaluate the effectiveness of the solution?</p>	
2.3	Managing Information	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Managed information and communication systems</li> <li>b. Identified and accessed information</li> <li>c. Managed the flow of information in a range of situations</li> </ul> <p>Think about a time when you have managed the flow of information in various situations, how did you identify the need and then access the information? How do you manage information and communication systems?</p>	
2.4	Leadership and Strategic Management of a plan	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Developed or contributed towards a strategic, financial or other plan</li> <li>b. Monitored and evaluated the effectiveness of a strategic, financial or other plan</li> <li>c. Managed the various aspects of a plan for example risk, procurement, costs and cost control, financial management, time management and product management</li> </ul> <p>Think about this within the scope of your job responsibilities. You might not have direct responsibilities but you may have made a contribution to strategic and financial planning.</p>	
2.5	Developing People and Teams	<p><b>This section is about how you have:</b></p> <ul style="list-style-type: none"> <li>a. Identified learning needs and negotiate a learning plan</li> <li>b. An understanding of appraisal and performance management</li> <li>c. Effectively managed a team</li> </ul> <p>Think about this within the scope of job role or as an individual if you do not manage a team. Have you helped or mentored a new employee and helped them understand what their training needs are? Have you had to negotiate a training plan? Do you carry out appraisals or do you have regular appraisals yourself? How do they help monitor performance?</p>	

Section	Title	Key Criteria	Have your examples included the key criteria
2.6	Innovation	<p><b>This includes how you have:</b></p> <ul style="list-style-type: none"> <li>a. Used innovative ideas or solutions to bring benefit to an organisation or project</li> <li>b. Developed innovative ideas or solutions</li> <li>c. Used innovation to reduce costs or time</li> </ul> <p>Think about how you have developed a new way working, what benefits it brought in terms of cost and time or other. Can you provide some evaluation and reflection regarding your idea?</p>	
<b>SECTION 3 – COMMITMENT TO PROFESSIONALISM</b>			
3	Commitment to Professionalism	<p><b>This includes how you:</b></p> <ul style="list-style-type: none"> <li>a. Demonstrate an understanding and application of professional judgement and responsibility, including ethical decision making</li> <li>b. Understand CPD and the benefits</li> <li>c. Understand the rules and regulations of CIOB membership</li> </ul> <p>Think about an example where you have had to make a professional judgement. <b>Make sure it is outside of your normal sphere of work.</b> Show your understanding by providing examples and how learning benefitted you.</p> <p>Please refer to the following link in relation to more information regarding Ethics in our Rules &amp; Regulations: <a href="https://www.ciob.org/about/who-we-are">https://www.ciob.org/about/who-we-are</a></p>	

# The decision

**The applicant will be advised of the result once the application has gone through the assessment process.**

## PASS

The applicant will receive written confirmation and an invitation to a ceremony.

## INTERVIEW

Where further clarification is required, applicants may be invited to attend an interview to be given the opportunity to expand on their application.

## DEFERRAL

In cases where the applicant fails to meet the criteria they will be advised they have been deferred and provided with an explanation including advice on what is required before a new submission can be made. Any re-submission should take into account feedback given.

# The appeals process

You have the right to appeal if your application is deferred. Appeals must be made within one month of receiving the deferral letter.

Appeals cannot be made on the grounds of disagreement with the assessment outcome. The appeal must be based on a valid reason such as:

Failure to correctly follow the process and procedures for the assessment or where you suspect there may be bias in the assessment process and this must be stated in full in the letter of appeal. No new material or documents can be brought into the appeal. The appeal is to be based solely on the application and correspondence received.

Appeals are to be made in writing, stating the grounds for the appeal. Your letter of deferral will provide you with the contact details.



**CIOB**

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# Thanks for reading

We hope you found our guide useful and instructive. If you have any questions please contact: [pr.application@ciob.org.uk](mailto:pr.application@ciob.org.uk)