

IM-P02 INFORMATION FOR INDIVIDUAL APPLICANTS

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1 Purpose & Scope

This document sets out procedures for application by individual applicants to become Members or Associates of the Institute of Management Consultants and Advisers (IMCA) and, for those engaged in management consultancy, for CMC accreditation.

2 Responsibility

The Membership Review Board (MRB) of the IMCA manages these procedures.

3 Documentation & References

The key documents referred to in this procedure are set out below.

Ref.	Title	Online Version
IM-F01	Code of Professional Conduct	http://imca.ie/using-consultants/code-of-conduct/
IM-F02	Competency Framework	
IM-F03	Ethical Guidelines	
IM-F04	Membership Application Form	http://imca.ie/become-a-member/apply-for-membership/?t=individual
IM-F05	Client Reference Questionnaire	
IM-F06	Associate Application Form	http://imca.ie/become-a-member/apply-for-membership/?t=individual
IM-F10	Annual Affirmation Form	http://imca.ie/members-area/annual-affirmation/
IM-F11	CPD Log	

4 Guidance notes for Associates

To become an Associate of IMCA you are required to:

- Be in full-time practice (employed solely or primarily) as a management consultant or business adviser in Ireland; and
- Have a third level degree or professional qualification from a recognised institute [experience may be accepted in lieu of a degree or institute qualification and candidates without a degree must be five years full time in a management consultancy or business advisory role instead].

(Note: Applications can be received from internal consultants or advisers in organisations and not simply from those working in practices or self employed.)

You are asked to submit to IMCA an Associate Application Form and CV, either online or downloaded (IM-F06). Confirmation of receipt of the application will be sent within a week.

Your application is assessed by IMCA, following which you will receive notification that your application is successful, subject to payment of the annual subscription, or that further information is required or that your application is unsuccessful. The membership fee due is payable on notification of acceptance of the application.

5 Member and CMC Overview and Definitions

To become a Member of IMCA you must have at least three years full-time experience in a management consultancy or business advisory role. You need not, however, be an Associate of IMCA for three years.

The requirements for CMC accreditation are the same as those for Members of IMCA other than that CMCs are required to be practicing solely or primarily as management consultants.

CMC is an internationally recognised management consultancy qualification based on strict certification requirements relating to competence, ethics and independence. Only members of ICMCI (International Council of Management Consulting Institutes) can award the CMC qualification. IMCA is a member and to become a CMC you must demonstrate your skills against IMCA's Competence Framework (IM-F02).

Step 1

Complete the written part of the assessment comprising:

- An Application Form either online or downloaded (IM-F04);
- An Assignment Study which is a detailed description, critique and reflection on three consultancy / advisory projects;
- A Professional Record, including a CV, to demonstrate competence against membership standards;
- Details of three independent referees who can vouch for your competence as a management consultant or details of an employer reference for business advisers.

Step 2

Attend a Pre-Induction Seminar or partake in the online version of this seminar <http://imca.ie/become-a-member/individual-member/>.

Step 3

If your written evidence is assessed as acceptable, you will be invited to attend an hour-long interview, linked to the information in the Assignment Study and Professional Record. If it is not acceptable, you will be asked to provide further evidence.

Interviews take place at approximately two monthly intervals.

6 Experienced CMC Applicants

Where applicants have been in a practice leadership role for two years and have 10 years consultancy experience (or 20 years business / consultancy experience) it will only be necessary to:

- Submit an application form (IM-F17) with contact details of two referees and a CV;
- Attend for an informal interview with the Membership Review Board.

Candidates are agreed in principle with the Board first with the assessment being carried out by the MRB and reported to the applicant as in 7.10 below. The interview is informal, to review their application and discuss how they may benefit from and contribute to the Institute.

7 Guidance notes for Members and CMCs

7.1 What is competence-based assessment?

Competence-based assessment is a method of establishing competence in the performance of a task or a range of tasks. Competent performance of tasks is measured against specific criteria.

In your application you must claim all-round competence as a management consultant or business adviser using these guidelines. You are asked to select from your experience summaries of assignments, which relate to one or more of the standards. For example, a proposal and final report may be sufficient if accompanied by a brief narrative giving an outline of the assignment with dates and reflective comments. All evidence must make clear the role you played.

7.2 Membership of IMCA

Membership of IMCA (and CMC accreditation where appropriate) is a competence-based qualification. The responsibility rests with you, the candidate, to produce sufficient, relevant and timely evidence of competence as a management consultant or business adviser.

Evidence is provided by:

- producing a detailed Assignment Study and making a presentation on it
- completing a Professional Record, including a CV (with copies of relevant certificates)
- providing corroboration of the evidence provided in the Assignment Study and Professional Record at an Assessment Interview
- giving details of three independent referees who can vouch for your competence as a management consultant or details of an employer reference for business advisers
- completing an Application Form

7.3 The Assignment Study

The Assignment Study should be based on three assignments that you have carried out successfully within the last three years. One of these should be a fully detailed study complete with a critique of reflective learning – the remaining two may be in summary. The projects should be typical of your work during that period and should, where possible, draw on your full range of strengths as a management consultant or business adviser. By exception, where a candidate has worked over a very long period with a single client, the assignments may be for the same client; these should be separate assignments, preferably for different clients within the organisation.

The Assignment Study should:

- Be written in the first person and make it clear which aspects of the work were carried out by you and which by other consultants and support staff;
- Summarise the briefs given by the clients or your employer;
- Describe the main assignment in detail, linking together the technical aspects of the work with the broader business acumen elements (see IM-F02 Competency Framework);
- Critically analyse the main assignment, describing the outcome and drawing out major successes or difficulties encountered;
- Describe what was learned from the assignments;

- Be clear and succinct, yet of sufficient length to allow for detailed analysis (3 - 4 pages should be sufficient). Diagrams or charts may be included if they add clarity.

7.4 The Professional Record

The Professional Record consists of the following:

- An up-to-date CV;
- Summaries of consultancy or advisory assignments, e.g. briefings, analyses and final reports;
- Evidence of ongoing training and continuing professional development;
- Evidence of qualifications - academic and vocational.

IMCA will respect the confidentiality of all documentation. If necessary, you may remove the names of clients or confidential details from the documentation, stating where this has been done. IMCA may seek verification of professional qualifications and previous employment.

Evidence should be sufficient, relevant and timely. Think of the Assessor as a client who must be fully convinced by what is produced. The Assessor will spend a fixed amount of time on the paper evidence from all candidates, so you should aim for clarity and brevity.

You should retain all originals and keep a full duplicate of your Assignment Study and Professional Record.

7.5 Independent client referees / Employer referees

Applicants who are management consultants must provide contact details of three independent client referees, who should be end-users of their consultancy work, on the Application Form. At least one of the referees should have been the client for an assignment described under the Assignment Study above. IMCA will contact these referees directly in writing (IM-F05 Client Reference Questionnaire) and references forwarded by you cannot be accepted. You should notify your referees before submitting an application. A minimum of two strongly positive references is deemed acceptable.

Applicants who are business advisers must provide details of a referee from their employer on the Application Form and IMCA will contact them directly in writing (IM-F05). You should notify your referee before submitting an application.

7.6 Application Form and CV

You are asked to complete a Membership Application Form, either online or downloaded (IM-F04), and to include in your Professional Record a CV which should include all relevant dates. Copies should be provided of relevant certificates.

7.7 Pre-Induction Seminars

The Board of IMCA has decided that all applicants for membership should attend Pre-Induction Seminars organised by the Membership Review Board on the application process or complete the online version of this seminar.

Seminars will be of two hours duration and currently cover the Application Process, Ethics and Consulting Skills. The content may be altered over time based on feedback from attendees.

The Board of IMCA will fix the cost of each seminar annually based on recommendations from the MRB.

7.8 The Assessment Interview

The Assessment interview will be conducted by a panel of three persons nominated by the Membership Review Board who are themselves full members and for CMC accreditation who are CMC qualified management consultants.

The Assessment Interview takes a maximum of one hour.

A. Presentation on the subject of the Assignment Study

You will be asked to give a 10-minute presentation to the panel.

B. Questioning on the Assignment Study

During the following 20 minutes the panel will question you about the Assignment Study and related presentation. The aim of the questioning is to corroborate the evidence you have presented in both written and oral forms, and to ensure that the assignment has afforded you appropriate scope for learning.

C. Questioning about the Professional Record

During the remaining 30 minutes the panel will question you on your Professional Record. The aim of the questioning is to corroborate the evidence presented and to determine the stage of professional self-development attained. You will be asked questions about the Continuing Professional Development (CPD) aspects of the Professional Record and if you are willing to abide by the IMCA Code of Professional Conduct (IM-F01).

7.9 How do I know if I am ready to apply?

Carefully study the requirements and the Competency Framework (IM-F02). If you require further help, contact us and we may be able to help you directly or put you in touch with a mentor who will discuss your application in more detail.

7.10 What happens next?

Submit the completed application form and supporting documentation to IMCA. Confirmation of receipt of a complete application will be posted within a week.

Assessment of documentary evidence then takes place. You will receive an assessment report stating, either:

- That the documentary evidence submitted is acceptable; or that,
- Additional evidence must be supplied within three months of the date of the notification (stating which areas need to be addressed).

Arrangements for your Assessment Interview will be made once we have accepted your documentary evidence. At the Assessment Interview you will be expected to expand on and corroborate the documentary evidence supplied.

After the interview the Interview Panel will make a recommendation to the Board of IMCA. Following the Board meeting you will:

- Receive an email confirming that you are now a Member of IMCA, and a CMC for those in consultancy roles; subject to payment of subscription, or
- Receive a report stating which areas require further evidence if you need to make a new application. A new application may be made within six months.

Within a few weeks of being accepted you will receive an individually signed Membership Certificate.

7.11 The basis of assessment

The assessment will be made against the three areas of competence shown below. These are described in detail in the Competency Framework (IM-F02).

- Business competence;
- Technical competence; and
- Values and behaviours competence

Business competence

You should demonstrate your awareness of the current external issues that affect your work as a management consultant or business adviser. This awareness should be demonstrated throughout the assessment in the Assignment Study, the Professional Record and the Assessment Interview.

Technical competence

You must provide evidence (copy of certificate) of one or more of the following:

- A primary degree, or
- A higher degree, or
- A postgraduate vocational qualification, or
- A qualification from a recognised professional institute, and / or
- A portfolio of evidence of experiential learning which is accepted as the equivalent to one of the above, with at least five years full time experience in a management consultancy or business advisory role in lieu of a degree.

One or more of the above must be relevant to the specialism of your primary work as a management consultant or business adviser.

Values and behaviours

The guidelines in the Competency Framework should be used here. In addition, you must provide evidence that you comply with the IMCA Code of Professional Conduct (IM-F01) and Ethical Guidelines (IM-F03).

8 Appeals Process

If you wish to appeal against a decision, you should write to the Secretary, Institute of Management Consultants and Advisers, 19 Elgin Road, Ballsbridge, Dublin 4, outlining your reason for the appeal.

The President of IMCA will appoint a sub-committee of the Board who will review the appeal and in a recommendation to Board may:

- uphold the decision
- request further written evidence
- request a second written assessment / assessment interview / complete assessment (by a different panel)

The sub-committee will be the highest point of appeal and its decisions will be final.

9 Annual Affirmation

The Board of IMCA maintains an Annual Affirmation procedure for all grades of the Institute to: a) obtain an annual written undertaking to adhere to the Code of Professional Conduct b) obtain a statement that they are currently in practice and c) to monitor the professional development activities undertaken.

For individual members:

- The Administrator issues an Annual Affirmation Form (IM-F10) to each member annually;
- Members return completed forms providing details as above;
- The Administrator reviews the forms for completeness and notes any non-compliance to the Chairman of the MRB;
- A random sample of 33% of members is requested to provide CPD Logs (IM-F11) for scrutiny by the MRB, with all members' CPD Logs scrutinised over a three-year period.

The Chairman of the MRB reports to Council annually on the Annual Affirmation process and makes recommendations on any instances of non-compliance.