



CIMA Practical Experience Requirements (PER)

A webinar on creating and submitting your PER

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Webinar will
start at 12:30

Agenda

- What is PER and the new process?
- Breakdown of CIMA PER requirements
- THE CGMA Competency framework
- Recording competencies effectively
- How to use the Member Application Tool
- Verification

What is PER?

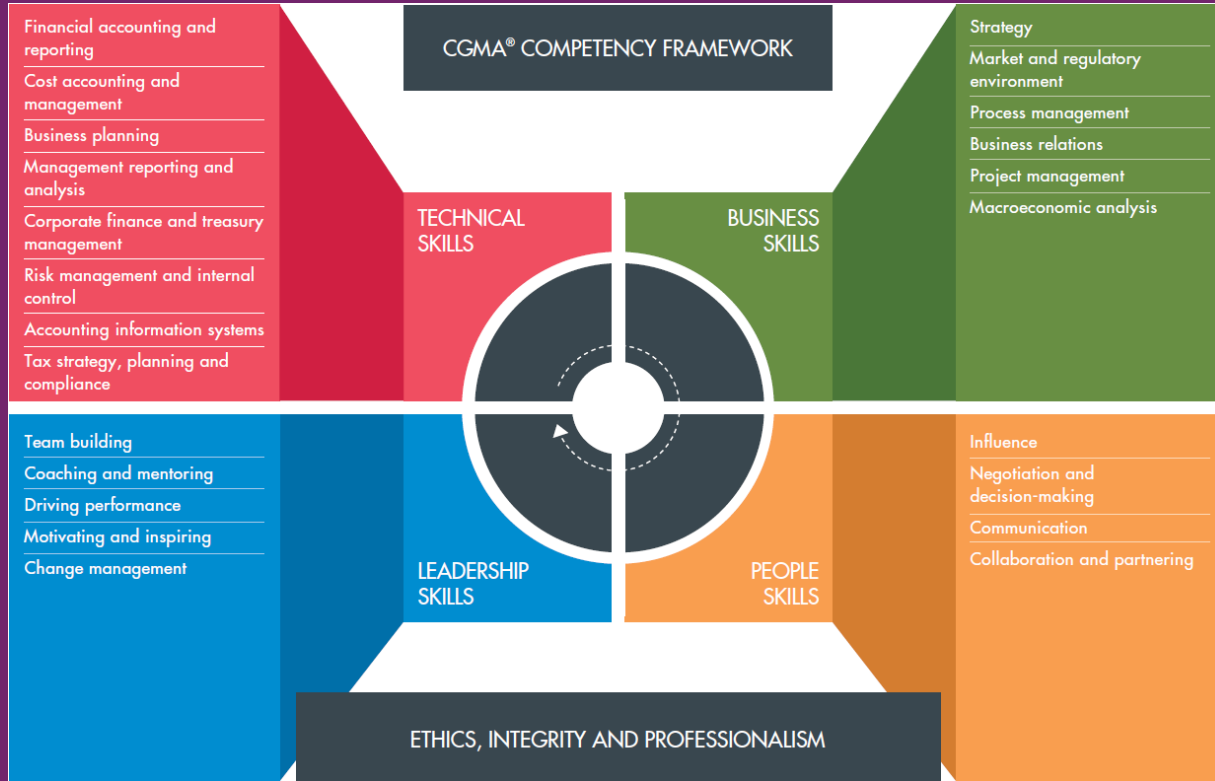
- PER stands for Practical Experience Requirements.
- In order to become a Chartered Global Management Accountant (ACMA, CGMA), you need a minimum of three years' verified and relevant work experience and have passed all of your CIMA exams.
- Complement assessments and demonstrate your ability to apply your knowledge and skills in the context of your professional experience. A guarantee for employers.
- 100% based on the CGMA competency framework – The practical accompaniment to the CIMA syllabus.

TOP TIP:

Keep a copy of the competency framework and refer to it.

Annotate it when you gain competencies

PER Requirements



These four categories must cover the minimum 36 months

At least 18 months of this must be at the intermediate, advanced and/or expert level

At least four competency categories must be selected between Technical and Business skills, with at least one from each area.

A minimum of one competency category each from People and Leadership skills.

These should be in the context of the Technical and Business skills over the minimum 36 months across foundational, intermediate, advanced or expert levels.

CGMA Competency framework vs. Your role

MANAGEMENT ACCOUNTING ROLES AND COMPETENCIES



Example

TECHNICAL SKILLS

MANAGEMENT REPORTING AND ANALYSIS

MANAGEMENT REPORTING

This is the process of delivering, discussing and reporting on the organisation's operations and financial conditions (including quality and sustainability reporting, customer profitability).

FOUNDATIONAL

- Extract and deliver straightforward management information reports
- Prepare and provide accurate and timely financial data, where appropriate, for inclusion in the financial control process

INTERMEDIATE

- Deliver quality management information
- Develop business unit reporting systems for management, project or performance reporting and implement processes to deliver management information according to the reporting cycle

ADVANCED

- Assess, generate and implement ideas to optimise identification and delivery of management information to multi-functional teams
- Lead the development of functional reporting systems, for management, project or performance reporting
- Challenge and make fundamental changes to address root causes of management information and reporting quality/correctness issues

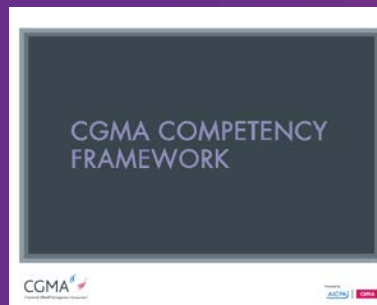
EXPERT

- Develop new strategies, processes and systems that provide top quartile management information to businesses in terms of quality information and low cost/high value solutions
- Set the standard for corporate management reporting and specified information systems to support their implementation
- Identify and implement best practice management reporting across the organisation and wider industry; provide strategic insight on the content of reports

KNOWLEDGE AREA
COMPETENCY CATEGORY
COMPETENCY SUB-CATEGORY

PROFICIENCY LEVEL

INDIVIDUAL
COMPETENCIES



Proficiency Levels

EXPERT

This requires expert knowledge to develop strategic vision and provide unique insight to the overall direction and success of the organisation. This has formal responsibility for business areas and his/her actions and decisions have a high level of strategic impact.

ADVANCED

This requires strong understanding of the organisation's environment, current strategic position and direction with strong analytical skills and the ability to advise on strategic options for the business. This includes formal responsibility for colleagues and their actions; and that their decisions have a wider impact.

INTERMEDIATE

This requires a moderate understanding of overall business operations and measurements, including responsibility for monitoring the implementation of strategy. This has limited or informal responsibility for colleagues and/or needs to consider broader approaches or consequences.

FOUNDATIONAL

This requires a basic understanding of the business structures, operations and financial performance, and includes responsibility for implementing and achieving results through own actions rather than through others.

500/650

WORDS

200

Competency categories/Sub categories

Technical Skills	Intermediate	Advanced	Expert	Minimum competencies required
Management Reporting and Analysis				2
Financial Analysis	3	4	4	(2)
Management Reporting	2	3	3	Not alone
Performance Management	3	4	4	(2)
Variance Analysis	2	2	1	Not alone
Benchmarking	1	1	1	Not alone

- Within the Technical and Business you will need to demonstrate more than one competency per category. There are some competency categories where you will need to demonstrate competencies from more than one of the sub-categories as outlined above.
- This is to ensure that you have the right mix of experience for the competency. You can find this table in Appendix A in the PER guidance document

TOP TIP:

The minimum number of competencies to demonstrate is not a target, if you have more, record more. Likewise though, show common sense if you have a large number of competencies to demonstrate, more is not always better.

What activities or competencies do I record?

Weekly activity you do every week and takes 1 day of your time per week = 20%

Monthly activity that takes 2 days of your time = 10%

Monthly activity that takes 1 day of your time = 5%

Only record activities that are regular and take a minimum of 5% of your job role

If you have a wide variety of responsibilities within your role, think about the what you spend the bulk of your time doing.

TOP TIP:

Assess what competencies you can demonstrate with your experience rather than trying to apply your role to the framework

Recording competencies

Experience gained needs to be recorded against the appropriate competency and the assessment will take account of the following aspects:

- Have you identified the correct competency?
- Does the description of the experience gained clearly demonstrate that the competency has been evidenced? You have to show how the tasks completed by you are fully aligned with the activity defined
- Does your experience gained clearly support the proficiency level claimed?

TOP TIP:

Don't copy/paste narrative into different competencies. Each competency is unique and each narrative should be solely focused on evidencing your experience that demonstrates that competency.

What do I write?

- Each competency you are recording needs to have a detailed description around how you gained that experience.
- Best practice is to structure your example using the S.T.A.R. technique:
 - **Situation:** Outline the situation **you** were in.
 - **Task:** What did **you** have to achieve?
 - **Action:** What did **you** do? An assessor will be looking for information on what **you** did and why **you** did it.
 - **Result:** What was the outcome of **your** actions? What did **you** achieve through your actions and did you meet your objectives?

Top Tips:

- Make it clear you are talking about your own experience, write in the 1st person.
- Describe your own experience, not a process.
- Don't repeat yourself
- Avoid bullet points wherever possible.

Creating the right narrative for the right level

Financial accounting and reporting

Transactional accounting and closing processes

This is the process of recording, adjusting and reconciling financial transactions and events according to professional accounting standards.

Foundational =

Doing at a basic level

Perform all activities within the receivables process; **calculate** non-complex provisions using **appropriate methods**; **identify risks** of bad debts

Foundational

- Perform all activities within the receivables process; calculate non-complex provisions using appropriate methods; identify risks of bad debts

Intermediate

- Oversee the receivables process; identify ways to mitigate debt-related risks; calculate the impact of debtors on financial ratios; calculate non-routine provisions

Advanced

- Resolve exceptional situations in the receivables process, calculate complex provisions; advise on debtor risk mitigation methods
- Manage centralised, complex

Expert

- Design receivables and payables processes and relevant strategies according to best practices
- Produce guidelines and policy for accounting operations;

Expert =

Designing processes and formulating/influencing strategies
Design receivables and payables processes and relevant **strategies** according to **best practices**

Intermediate =

Managing, overseeing and analysing

Oversee the receivables process; identify ways to **mitigate** debt-related risks; calculate the **impact** of debtors on financial ratios; calculate **non-routine** provisions

Advanced =

Leading and dealing with complex issues

Resolve exceptional situations in the receivables process, calculate **complex** provisions; **advise** on debtor risk mitigation methods

COACHING AND MENTORING

This is the ability to train and advise others on how to perform, improve and succeed by producing best results.

FOUNDATIONAL

- Seek, provide and successfully incorporate feedback into future behaviour
- Orient new employees on the job; aware of the need for and the value of training, both for self and others
- Take ownership of career; implement a development plan that is aligned with performance evaluation; and/or partner with manager to identify strengths and opportunities

INTERMEDIATE

- Proactively seek feedback to gauge and monitor progress and update development plan to facilitate continuous self-improvement
- Participate in developing and delivering training to finance employees and business partners; use relevant training courses and programs to build the skills of others
- Provide regular, timely, constructive and actionable feedback to team members and management; proactively identify potential people for talent development opportunities

ADVANCED

- Create a team environment where members provide each other with constructive feedback regularly and in challenging situations
- Identify and communicate strengths and development areas in others; ensure development plans are implemented; empower and give adequate exposure for all team members
- Balance the needs of the organisation and career needs for individuals; lead the talent management process for the department; lead training solutions

EXPERT

- Drive strategic training initiatives to enhance the whole organisation; lead and influence the broader development planning process
- Actively arrange for developmental or stretch assignments into other functional areas or business units for the benefit of the organisation and the individual
- Champion the recruitment, development and retention of high potential and high performing individuals; make time available for coaching, mentoring and feedback

BAD example:

My manager coached me and I improved my performance.

GOOD example:

I coached my team of eight people by holding monthly workshops which explained how performance could be measured and improved to help their career prospects. I also held one-to-one meetings with individual staff members to ensure that they understood any particular performance issues and encouraged them with practical examples of how their performance could improve and their skills could be developed, which in turn would open career paths for them.

Membership application tool (MAT)

- The MAT (Membership Application Tool) should be used to record experience as and when it is achieved and can be found through MY CIMA.
- You can begin to record your experience as soon as you have started the operational level
- This process has been designed for students to complete as they progress through their studies, not only to help with the verification process but it will also aid you with your studies by giving you practical examples for what you are learning.

IMPORTANT INFORMATION

MyCIMA will automatically log you out after **15 minutes** of 'Inactivity' and unfortunately typing is not 'Activity'.

There are two solutions to this problem:

Make sure you hit 'save' every 14 minutes.

or

Type your experience in Word and then copy/paste into the system.

Allocate your time

Competency time allocation

Please allocate the percentage time spent in this role across the multiple competencies at the various levels up to a maximum of 100% across all competencies. Percentages will be used to calculate the effective time spent at the different levels

Employer: The Chartered Institute Of Management Accountants

Assistant Management Accountant - 12 months in role

1st November 2014 - 31st October 2015

Level	Competency categories	Percentage
Foundational	Financial Accounting and Reporting	Technical Skills
	Demonstrate awareness and knowledge of the professional accounting standards	<input type="text" value="50"/>
Foundational	Management Reporting and Analysis	Technical Skills
	Prepare and provide accurate and timely financial data, where appropriate, for inclusion in the financial control process	<input type="text" value="50"/>
		Total: 100

People Skills and Leadership Skills

Below are competencies from People and Leadership areas. These competencies do not need to be apportioned and are just for your information.

Level	Competency categories	Percentage
Intermediate	Coaching and Mentoring	Leadership Skills
	Participate in developing and delivering training to finance employees and business partners use relevant training courses and programs to build the skills of others	<input type="text" value="0"/>

TOP TIP:
Where possible,
don't use work
jargon or
abbreviations

Verification

- Your experience needs to be verified by at least two people who have knowledge of your work prior to submitting your membership application.
- Verification would normally be provided by your immediate supervisor or manager, unless there are special circumstances and they must be able to confirm that you have carried out the activities described.
- Verifiers should not be relatives of the applicant.
- Verification can take place as soon as your experience has been recorded and there are no planned amendments. (If you make any changes to your experience, it will need re-verification.)

The Chartered Institute Of Management Accountants

1st November 2014 - Current

Verifier's name	Job title	Verification period	Calculated Months	Level	Email sent?	Verified	Actions
Edward Goodeve-Docker	Management Accountant	Nov 2015 - Nov 2016	12	Foundational	Not yet	✓	Choose.. ▾
Ed Docker	Assistant Management Accountant	Nov 2014 - Oct 2015	11	Foundational	Not yet	Not yet	Choose.. ▾

Choose..
Remove verifier
Edit verification period
Edit verifier email
Add additional verifier

Is my application ready? ⓘ

TOP TIP:

Use the “Is my experience ready?” button as frequently as you like while you complete your application, only use the “Is my application ready?” when you want to submit to CIMA

Wherever possible, only add verifiers after it clears the eligibility criteria on this button.

Career Progression Summary

- Upload prior to submission
- Resume/CV of providing a broad overview of entire career
- Enables the assessors to gain an understanding of how the 3-5 years submitted fits into the rest of your career
- Opportunity to detail additional experience that you wish the assessors to consider

TOP TIP:

Use the illustrative example of the [Career Progression Summary](#) that is available on our website.

What happens after submission?

- After submission, the application will first be checked by the Membership Applications team. You may find that we put it back to you to re-do something.
 - Once we've checked it, and determined it's ready for assessment, it will be assigned to two Assessors who will complete their assessments independently of each other. You will be notified of the result by email.
 - In the event that the application is not considered to demonstrate adequate experience, it will be deferred and you will be advised of areas that need to be strengthened or where further explanation is required
-

Useful website links and documents

CGMA Competency Framework

<https://www.cimaglobal.com/Studying/Becoming-a-cgma/Practical-experience-requirements/Updated-requirements/CGMA-Competency-Framework/>

PER Brochure

<https://www.cimaglobal.com/Studying/Becoming-a-cgma/Practical-experience-requirements/Updated-requirements/>

MAT User Guide

<https://www.cimaglobal.com/Studying/Becoming-a-cgma/Practical-experience-requirements/Updated-requirements/Application-and-assessment/>

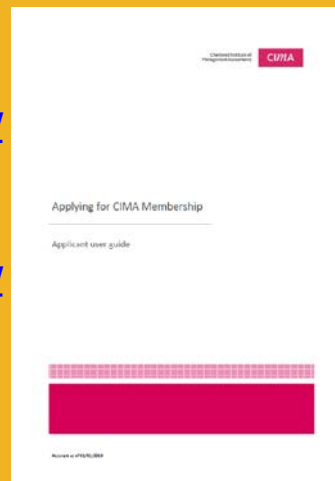
Illustrative example of Career Progression Summary

<https://www.cimaglobal.com/Studying/Becoming-a-cgma/Practical-experience-requirements/Updated-requirements/Application-and-assessment/>

www.cimaglobal.com/per

CIMA Contact support - 0208 849 2251

CIMA PER Presentation 2018





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