

CIMA's CGMA practical experience requirements — guidance for PER supervisors

To gain the Chartered Global Management Accountant® (CGMA®) designation, applicants need three years verified relevant professional experience.

The professional experience requirements are an essential part of the CGMA® Qualification and CIMA's membership application process. They complement the examinations and demonstrate the applicant's ability to apply knowledge, skills and behaviours in the context of professional experience. Applications are assessed to determine whether applicants have gained enough experience to be awarded Associate membership and the use of the Associate Chartered Management Accountant (ACMA) and CGMA designations.

Employers play a crucial role in the professional experience component of the CGMA qualification, supporting the initial professional development of their employees and providing opportunities to gain experience, put learning into practice and develop skills and behaviours. They also provide assurance to CIMA that the applicant has achieved the required experience and met the required standard.

This document is a practical guide to support employers who are acting as PER supervisor to one or more of their employees (past or present). It has been split into 2 sections:

A. The PER supervisor role

B. Guidance notes for PER supervisor

A. The PER supervisor role

Am I qualified to be a PER supervisor?

As a PER supervisor, you provide assurance to CIMA that the applicant's experience and professional achievements meets the required standard. To act as a PER supervisor, you do not need to be a CIMA member or a qualified accountant, but you must have had direct knowledge and oversight of the applicant's work and have been in a more senior position to the applicant, ideally the applicant's line manager. You cannot be a relative of the applicant.

You may be asked to act as PER Supervisor by someone you currently manage or someone whose work you have overseen in the past. You do not have to currently work at the same organisation.

Applicants may have one or more PER supervisors depending on their employment history (number of roles) and what elements they are using to claim experience and professional achievements. Further guidance in the form of illustrative scenarios where multiple PER supervisors are necessary can be found **here.**

What do I need to do as a PER supervisor?

PER supervisors may be asked to sign off time in a relevant role or roles and/or provide assurance of one or more of the required professional achievements. You will need to:

1. Receive an email asking you to review 1 or more sections of an application. Click on the link in the email.
2. Review the sections of the application allocated to you and assess whether the applicant has met the requirements for membership.
3. Agree to the declaration, or reject and ask for more information.

An overview of the application is provided in **Section B** of this document along with guidance on how you should make your judgement as to whether the requirements have been met.

More information and instructions can be found **here**.

What happens after I sign off a section of the application?

The applicant will receive an email once all sections are signed off.

Assessors will then undertake quality checks of the applications. Occasionally, this may involve contacting PER supervisors to confirm details. All being well, the application will be approved and the applicant will be elected as a CIMA member and entitled to use the ACMA and CGMA designations.

B. Guidance notes for PER supervisors

Overview of the assessment

The CIMA membership application and assessment of professional achievement comprises three key elements:

- Demonstrating three years' experience in a finance role
- Demonstrating achievement of work activities that are core and critical to the role of the management accountant
- Demonstrating development of professional skills or behaviours that are essential to the management accountant

As a PER supervisor you may be asked to verify some or all of the three years' relevant experience. You may also be asked to sign off the professional achievements being claimed against the role in which you oversaw the applicant's work.

Relevant experience and record of employment history

Our members and candidates work in a broad range of finance roles in a wide variety of industries around the globe. The professional achievements assessed under the experience requirements are those that are essential to meet during the period of PER and have been chosen as they are applicable and relevant to the experience that applicants will typically have by this point in their career regardless their role, organisation or industry.

Applicants must record in detail and have their PER supervisor(s) verify three years' experience (full time equivalent) in a finance role. Applicants may have several roles to include or just one — there is no upper or lower limit. The applicant must record in detail sufficient work experience overall to demonstrate that the overall requirement for three years' experience has been achieved but there is no need to apportion time further, for example to each professional achievement.

Some applicants may have significantly more experience than three years or have a more senior role. In this situation, applicants can choose to draw on examples from an earlier stage in their career or choose more recent examples from their most senior role(s) which demonstrates how they have developed the selected professional achievement beyond the threshold required. For more information visit relevant experience FAQS **here**.

To help applicants decide whether they have the right level of experience to apply for CIMA membership, guidance is provided on the characteristics of the types of finance role which would generally meet the requirements for membership.

For more information on relevant experience and what your employee should include in this section; see the guidance to applicants **here**.

Record of professional achievement: core activities, skills and behaviours

The main sections of the assessment template require applicants to demonstrate and discuss how they have met all of the required professional achievements (core work activities and skills and behaviours as set out in the table below), drawing on actual examples from their work during their initial professional development.

The core activities and skills and behaviours for this assessment are summarised in the table below. For further details, including self-reflection questions for applicants and example work activities that could be used to demonstrate achievement, see the guidance to applicants **here**.

Core activities (3 of 5 required)		Skills and behaviours (5 of 5 required)	
A.	I can evaluate opportunities to add value.	I.	Ethics and integrity
B.	I can implement strategic decisions.	II.	Leadership
C.	I can manage performance and costs to aid value creation.	III.	Growth mindset
D.	I can measure performance.	IV.	Professional scepticism
E.	I can manage internal and external stakeholders.	V.	Communication

A standard format is provided to aid applicants in reflecting on their professional experience, choosing examples and discussing their achievements. This format uses the "STAR model" to help structure the discussion. The STAR model is a well-established technique for supporting self-reflection and structuring responses to assessment questions that require demonstration of professional achievements and competence.

The STAR format assists the applicant in going beyond a simple log or description of experience and actions and draws out discussion on the impact of their actions and how the applicant's work adds value to their organisation.

If your employee is struggling to select an example from their work for a particular professional achievement, you can support them in identifying instances where they demonstrated this in the workplace through discussion based on the guidance for applicants available (see the core work activities section **here**). Use the self-reflection questions and example activities for each professional achievement to structure a discussion with the applicant.

Examples of work activities are provided as a guide but cannot, of course, be exhaustive. There are many more ways in which an applicant could demonstrate achievement depending on experience, role, sector and organisation.

Each professional achievement has several self-reflection questions to help applicants think about examples of the kind of activities that could be used and expanded upon to demonstrate professional achievement. Applicants don't need to answer yes to each of the self-reflection questions. They are designed to assist in reflecting identifying relevant examples from the applicant's own work achievements to write up in the STAR template.

You can assist and support your employee in reflecting on their experience and choosing examples and provide feedback on the draft application, particularly when you are unable to sign off any STAR template where you do not judge that the "achieved criteria has been met" but it is critical that the write up is the applicant's original work and accurately records their experience, achievements and actions. It is accepted that applicants from the same organisation and/or on the same training programme may have similar experience, however the specific details of the experience and examples chosen and the way it is written up should be unique to each applicant, even if they have worked on the same project or in the same role. CIMA will undertake checks on the originality of applicant's work and PER supervisors also provide important assurance that the application is a true and accurate record of their employee's experience.

Assessing achievement

For each professional achievement, you are asked to review the completed STAR template and sign off if:

1. the details provided are a true and accurate record of the applicant's experience,
2. to the best of your knowledge, the application is the applicant's work and is not copied in whole or in part from any other person's work,
3. the example activities selected represent the professional achievement claimed and the completed STAR templates for each meet the "achieved" criteria detailed below

Not achieved	Achieved
• Unsuitable **situation** chosen: the task is too small or does not provide enough scope to demonstrate professional achievement. • **Task** does not demonstrate the core activity or skill/behaviour assigned. • Description of task missing or too brief. • Specific individual role and responsibilities within the task not described. • Inadequate description of the **actions** taken to complete the task or team, rather than individual, actions described. • Inadequate discussion of the **result** of own actions. Little or no insight into how actions impact business outcomes and add value to the organisation.	• Suitable **situation** chosen: the task is significant and challenging enough to demonstrate professional achievement. • **Task** clearly demonstrates the core activity or skill/behaviour assigned. • Task clearly described. • Specific individual role and responsibilities within the task clearly described. • Individual **actions** taken in completing the task clearly described. • Good discussion of the **result** of actions. Demonstrates clear insight into how actions impact business outcomes and add value to the organisation.

The above criteria, used in conjunction with the detailed core activity and skill/behaviour information, will be used to assess whether the applicant has achieved the required standard. PER supervisors and assessors will assess the submission using these same criteria. Take care that you are making your judgements based on what the candidate has written in the application and don't fill in any gaps based on what you know from your own recollections of their work. Independent assessors undertaking quality checks will not have the same insights as you and will be making judgements solely based on what is recorded in the application so please critically evaluate the applicant's write up against the "achieved" descriptors above.

You must not sign off on a professional achievement if you judge that the applicant's completed STAR template does not meet each of the bullet points under 'achieved'. In this case, provide feedback to the applicant on what is missing or needs to be strengthened to aid them in redrafting before resubmitting to you. If you did not oversee the work that is being used as an example and are not comfortable or confident in signing off then the applicant must approach someone who had closer oversight of their work at that time to act as PER supervisor for that particular professional achievement.

You must not sign off any aspect of the application if you do not believe that it accurately records the applicant's experience or if you have concerns that the any or all of the application write up is not the applicant's own original and independent work.

Further guidance

We have provided FAQs relating to all aspects of the assessment including PER supervisor sign off. If you have a query that is not answered in this guidance then please check the FAQs **here**. If you still can't find an answer, please contact us **here**.

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