

Fellowship of CIMA (FCMA)

Guidelines for Associate Members wishing to apply for Fellowship

1.0 Introduction

Associate members of CIMA, who can demonstrate at least three years' senior experience in one or more of the categories listed below, may apply for CIMA Fellowship. As a general guide, this senior experience would normally be at board level or, at least, reporting to directors/managers at that level.

2.0 Categories of Senior Experience

Applications must have acquired and be able to provide evidence of at least three years senior personal experience, from one or more of the following categories of senior experience:

2.1 Strategic Leadership

Definition: Experience of contributing input to original strategic decisions which the organisation adopts and which affect its future direction and success. (Note: It does not include the implementation or updating of processes deriving from such decisions).

It is likely that an applicant will have experience of direct participation in the formulation or control of strategic management and financial plans. Examples may include:

- participation in the formulation or review of management and financial policies and procedures;
- planning the provision of management information services and/or systems to monitor strategic decisions;
- planning, contributing to/appraising major projects and monitoring these projects during implementation;
- analysing, interpreting, making recommendations and presenting reports (to board level) on the current and likely future performance of the organisation.

It is expected that applicants working as management consultants, or from a consulting/practising environment, will themselves be employing or managing a number of staff and will have a number of major clients, to whom they are responsible not only for the strategic initiative, but also for the outcome of the implementation of any such strategic initiative/recommendations.

2.2 Operational/Functional Leadership

Definition: Experience of successfully leading and developing significant operational/functional areas within an organisation and being accountable for achieving business objectives at Board level, or to directors/managers who themselves are at board level.

Experience in this category may be gained within any significant operational/functional area of the organisation e.g. Finance, IT, Marketing, Business Development, Human Resources, etc. It is likely that holders of such senior posts will be responsible for leading and developing large teams of staff.

2.3 Technical Leadership

Definition: Experience of successfully developing technical thought leadership within an organisation and being accountable for providing advice on technical issues and matters at Board level, or to directors/managers who themselves are at Board level.

Holders of such technical development leadership roles may report directly to a director of the organisation and may not have any operational/functional or personnel management responsibilities. Examples of activities undertaken may include the development of new management accounting or financial management concepts and processes, development of new strategic management techniques, development required as a result of changes in legislation, etc.

3.0 FCMA Application Requirements

Applicants must complete and submit each of the following:

Section 1 - A 'Fellowship Application Form' (using the standard pro-forma provided).

Section 2 - A 'Fellowship Employment Summary' (using the standard pro-forma provided).

Applicants are required to provide details of all jobs/roles held since becoming an ACMA, organised in chronological order (earliest to most recent). If any 'senior experience' was acquired before gaining ACMA, details of these jobs/roles must also be included.

Section 3 - A 'Senior Experience Profile' (using a detailed CV format).

Applicants are required to provide a detailed description of their work undertaken, in one or more of the three categories of senior experience listed at 2.0 above.

Section 4 - An 'Organisation Chart'.

Applicants are required to provide one (or more) organisation charts that relate to one (or more) roles described in Section 3 - 'Senior Experience Profile'. The chart (or charts) must cover a minimum period of 3 years of 'senior experience' and be countersigned and dated by a more senior director/manager. Each must clearly show the whole reporting structure above and at least one level below the applicant's own role. The applicant's name and job title must be shown and highlighted on all charts.

Section 5 - Two (or more) written references.

Applicants are required to provide two (or more) written references. Ideally, referees should be senior directors/managers to whom the applicant has personally reported, and who have direct knowledge of the experience described in the 'Senior Experience Profile'. Between them, the two (or more) referees must cover a minimum of three years of the experience described in the 'Senior Experience Profile'.

The references must refer to the job title of the referee, and the dates during which the applicant reported to them (and in which organisation); a brief summary or endorsement of the work during that period (they may refer to the relevant extract in the 'Senior Experience Profile'), and their endorsement of the applicant's suitability for Fellowship.

Referees do not need to be members of CIMA, or to be qualified accountants, but it is important that they have knowledge of the applicant's work. Referees must not be relatives.

The Fellowship application fee.

4.0 CIMA Procedure for Assessing applications

Each application is checked to ensure that all of the requisite information required by the membership assessors is included, together with the appropriate fee. The application will be assessed by two members of the Panel of Membership Assessors (Fellows of the Institute). If the assessors are unable to award Fellowship, they will provide reasons why the application fails to meet the assessment criteria. They will also advise the applicant if additional information or further senior experience is needed.

5.0 Where to send the application

Applications, including all fees, should be sent to the following address:

Membership Applications
CIMA
The Helicon
One South Place
London
EC2M 2RB
United Kingdom