

Chartership Routes and Options

Shaun Richardson – Chartership Officer



Presentation to WMRG

Zoom Video-Conference Talk

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Outline of Talk

- Personal Introduction
- Background
- CGeol Application (normal route) & Pitfalls
 - AD1n, AD2n, AD3n
 - AD4n (CPD), AD5n and SD1-6
- CSci Application (normal route)
- Other routes to Chartership
- Chartership Timeline
- Additional Information

Shaun Richardson - Chartership Officer

Personal Introduction

- Spent circa. 35 years working as a Petroleum Geologist in the Oil & Gas Industry.
- Lived and worked in the UKCS, Europe, Africa, Middle East, India, SE Asia, South America and many other places – in both Technical and Managerial roles.
- Retired and relocated back to UK in 2015 and took up the Chartership Officer role in early 2019.
- Hold both CGeol and CSci plus CPG (from USA).



Background

Chartership Background

- Founded in 1807, The Geological Society (GSL) is the oldest Geological Society in the world
- The Society received a Royal Charter in 1825 from King George IV
- The GSL awards the Chartered Geologist title (CGeol) by virtue of this Royal Charter
- GSL is licensed by The Science Council to award Chartered Scientist title (CSci)

Why become Chartered?

- It is the only professional geological qualification available in the UK.
- The Chartership designation indicates a professional practitioner who has been peer assessed as having key professional competencies in their field of practice.
- CGeol qualification is becoming a legal and regulatory requirement for signing off reports, or providing professional consultation.

Pathway to Chartership (2)

Your next steps

- Become a Fellow of the Geological Society
 - Special reduced membership rates are available for students and early career geoscientists.
- Start to record your career development and experiences as a geoscientist
 - Use the Geological Society online CPD recording tool
- Start to create a portfolio of your work
 - Your portfolio will be so much more valuable than a CV or LinkedIn page
- Find a mentor, either in your company or via the Geological Society, to help you on your Pathway to Chartership

Contacts and further information

- Contact the Chartership Officer
 - chartership@geolsoc.org.uk
- Relevant web pages:
 - www.geolsoc.org.uk/become_a_fellow
 - www.geolsoc.org.uk/chartership

Your Pathway to Chartership

Start your journey to a professional Geoscience qualification now



The Geological Society

servicing science, profession & society

Pathway to Chartership (1)

Why become a Chartered Geologist?

The Chartered Geologist qualification is exclusive to Fellows of the Geological Society. It is the only professional geological qualification available in the UK. The award of the CGeol qualification acknowledges that you have reached an important professional milestone and marks you out as a competent professional in your field who adheres to a strict code of conduct. Increasingly, the CGeol qualification is becoming a legal and regulatory requirement for signing off reports or providing professional consultation. It doesn't matter where you work, or what your title is. Academic, Geophysicist, Engineering Geologist, Geoscientist – CGeol is the professional qualification for you.



Who should apply?

The Chartered Geologist qualification is appropriate for all professional geoscientists and all professionals for whom geoscience is an essential element of their field. The CGeol qualification is awarded across all the diverse sub-disciplines of geoscience. The Geological Society is also licensed by the Science Council to award Chartered Scientist (CSci) status. Both CGeol and CSci are of equal standing. Any professional geoscientist with an accredited degree at Master's or equivalent level should start their journey to achieve chartered status now.

How to start the journey?

To achieve Chartered Geologist status you need to prove your competency as a geoscientist, in your chosen field of experience. Your professional competency is tested by the presentation of a portfolio of your work and in an interview with your peers. To make the application process easier it is important that you keep a record of your learning and development from the start of your career. This could simply be a spreadsheet listing the courses, projects and experiences that are helping you develop as a geoscientist. It is also important to record some reflections on these experiences. What did you learn or what might you do differently next time? It is also important that you keep copies, where possible, of reports, presentations and papers which will form a large part of your portfolio.

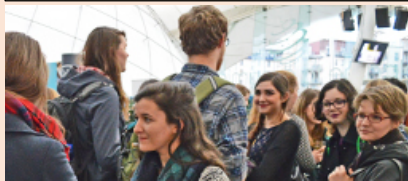
Find out more about continuing professional development (CPD)

<https://www.geolsoc.org.uk/membership/CPD-scheme/Information-and-Help>



Continuing Professional Development (CPD).

It is a requirement of becoming chartered that you continue to develop yourself professionally, throughout your career. This is pretty easy for all of us, as part of being a professional geoscientist means that you are continually exposed to new ideas or new areas of research. The Geological Society provides an online tool to Fellows, to help you keep a record of your CPD.



Routes to Chartership (CGeol & CSci)

- Normal Process:
 - For all applicants with <20 years post-graduation work experience.
 - CGeol (Normal Route) is the primary focus of this talk.
- Other Routes:
 - 20+ Years Process.
 - Retrospective Process.
 - Reciprocal Process.
 - Reinstatement Process.

The Application Process

- Decide which title to go for (CGeol or CSci)?
- Check Eligibility:
 - Am I eligible to apply? – qualified via Geology or Science?
 - Am I already a Fellow (FGS)?
 - Am I ready for Chartership?
 - Can I demonstrate fulfilment of the Criteria?
 - Who will sponsor me?
- Submit Application. Since this is a Peer Reviewed process, it is sent to 2 scrutineers who review documentation and confirm interview is warranted

CGeol Application & Pitfalls



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AD1n (Application Form)

- Mainly candidate personal information, including contact information and sponsor information.
- This form is used by the CO to select appropriate scrutineers.
- Please note that only V/C interviews being conducted at present (please advise if you are willing to participate in *Zoom* or *Teams* interview).
- Application to be sent via *WeTransfer*.
- Ensure relevant signatures included.

AD1n common pitfalls

- Download latest forms from website (things have changed!!).
- REMEMBER – only nominate 1 or 2 areas of expertise on form. You will be interviewed on every speciality you list – and you MUST pass on all of them.
- Collect signatures (electronics signatures accepted).
- Request your sponsors submit sponsor statements early (without them – no interview).

AD2n (Professional Report)

- This is a career CV which should demonstrate how your professional development as a geologist has evolved as you have gained experience.
- Cross-reference against your entire application documents while also ensuring you demonstrate competencies (i) to (vii).
- Make sure you arrange to have each section of AD2n signed.

AD2n common pitfalls

- REMEMBER – ensure your form is signed by relevant supervisors/managers.
- Try to cross-reference relevant parts of your professional report to selective COMPETENCE Criteria detailed on Form AD3n (and within SD's).
- Make it as easy as possible for your scrutineers to FIND the evidence of competency within the completed form.
- Ensure you focus on what YOU HAVE DONE yourself and demonstrate your competency as a GEOLOGIST.

AD3n (Overview of Competency Criteria)

- Your opportunity to present your case to the scrutineers that you are a competent GEOLOGIST, worthy of CGeol.
- Cross-reference against your entire application documents while also ensuring you demonstrate competencies (i) to (vii).
- Give particular attention to criteria (i) and (ii) which are the most common reasons for Deferral.
- Suggest 1-2 paragraphs to support each criteria.

AD3n common pitfalls

- Ensure you focus on what **YOU HAVE DONE** yourself and demonstrate your competency as a **GEOLOGIST**.
- Make sure you provide strong EVIDENCE to support your claim of competencies (i) to (vii).
- Cross-reference relevant parts of the AD3n form to evidence of Competence criteria detailed on Form AD2n (and within SD's).
- Make it as easy as possible for your scrutineers to **FIND** the evidence of competency within the completed form.

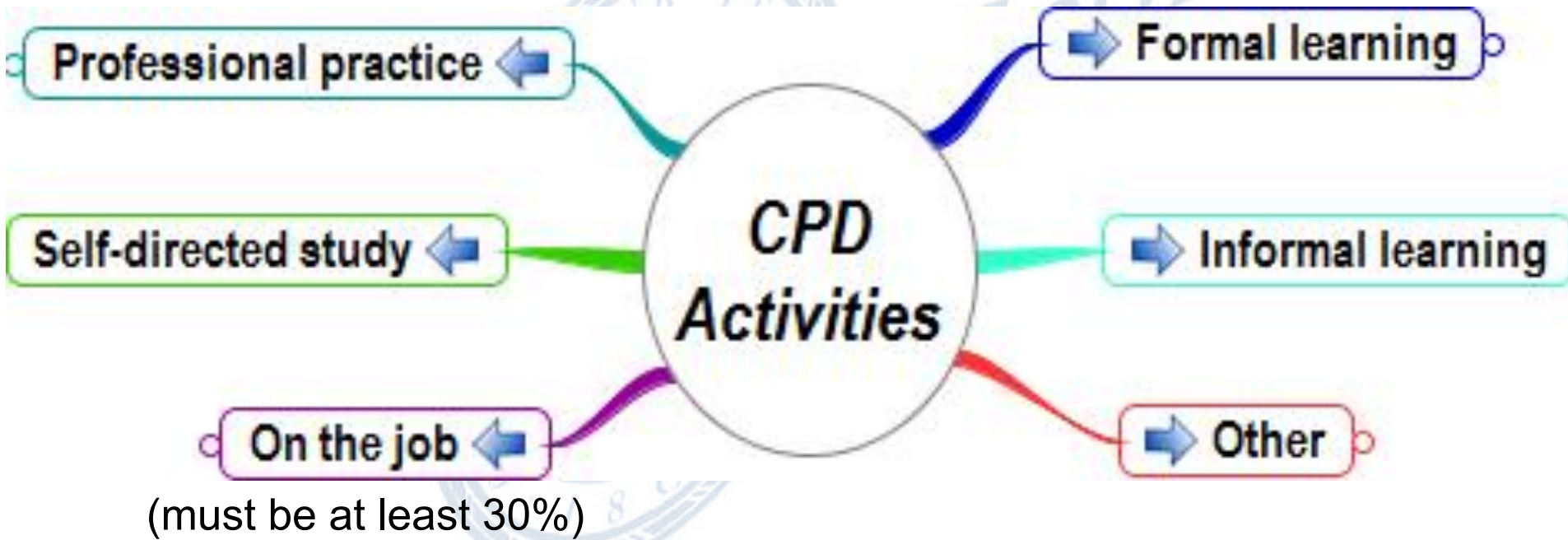
AD4n: CPD (Continuing Professional Development)

- A Professional person may be stated as someone who is obliged to perform CPD as part of their work-related activities.
- CPD is mandatory for all CGeol and CSci's who must maintain their records and make them available for audit.
- CPD is a key part of the application process (AD4) and applications must include 3 successive years of CPD records, which meet the Plan-Action-Reflect format.

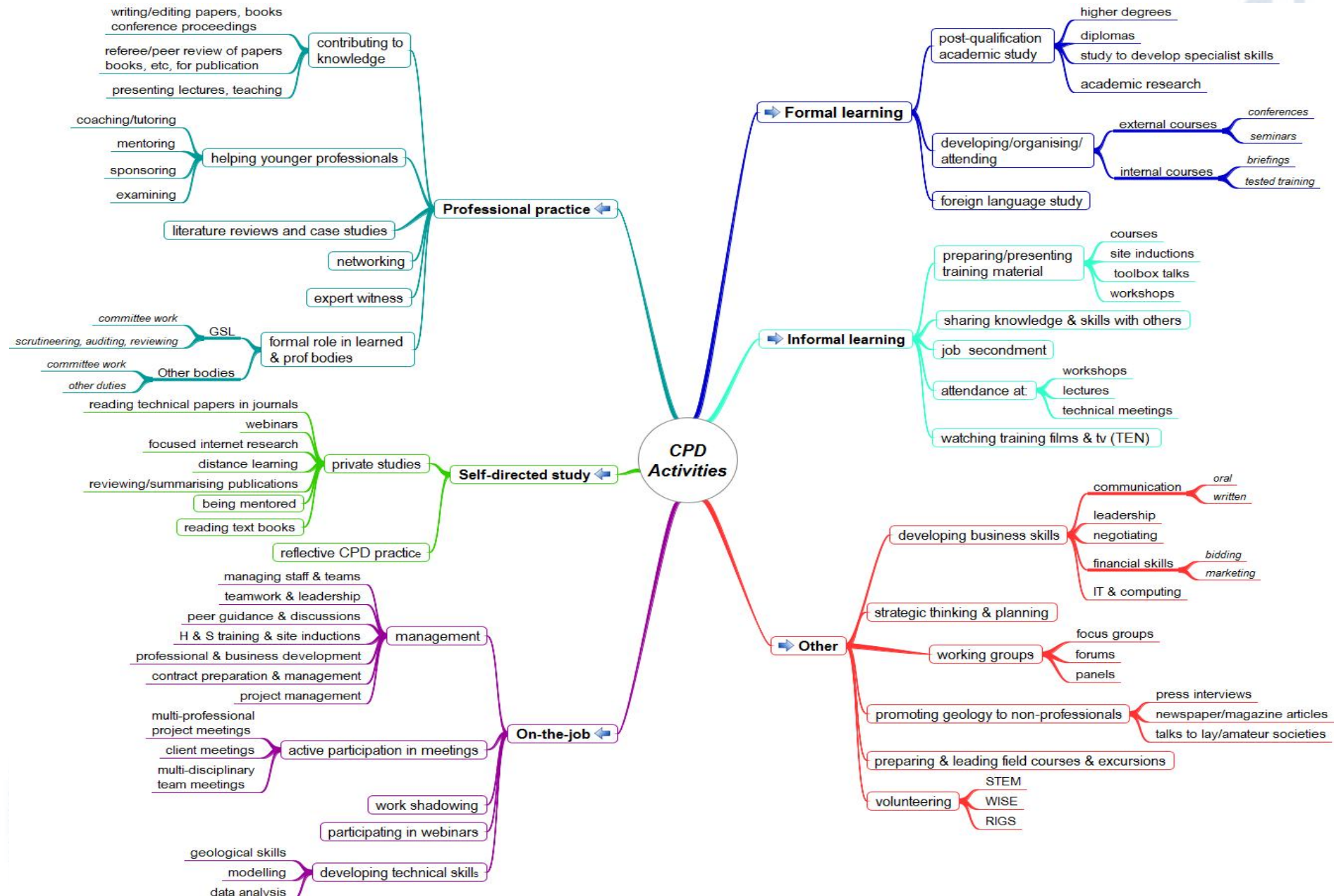
Minimum Amounts of Annual CPD for Chartered Fellows in Various States of Work

Work Status of Fellow	Min annual CPD, total hr	Min total CPD hr in On-the-job learning	Max annual carry-over of excess hr
Early career (pre-Chartership) Fellows	≥ 90	30	20
All Fellows in full time employment, or on sabbatical leave	≥ 90	30	20
All Fellows in part time employment (eg, work sharing)	≥ 50	16	10h
All Fellows on extended leave (carers, parental leave, prolonged illness, etc) (but with special pre-arranged GSL dispensation, 50% of these hours may, exceptionally be allowed)	≥ 40	0	8h
Retired Fellows offering occasional professional services, or those who wish to retain their chartered status, and unemployed Fellows	≥ 50	0	10h
Retired Fellows not offering professional services or who do not wish to retain their chartered status	Optional	0	—

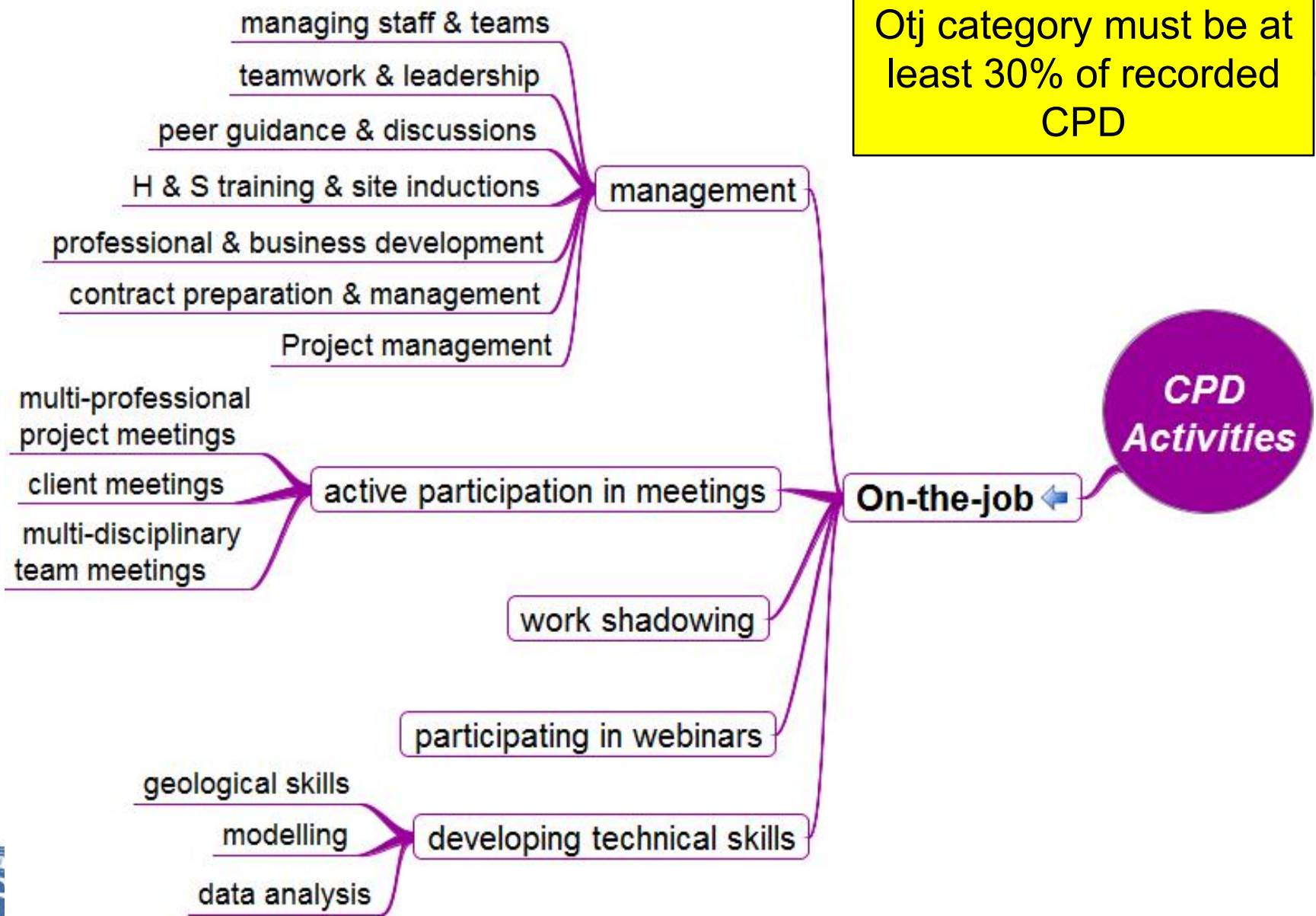
CPD Categories



CPD Mind Map



Otj category must be at least 30% of recorded CPD



CPD Recording

- Since 2017 the GSL has implemented a new approach to recording CPD:
 - Straight hours-based rather than Weighted points-based
 - Must ensure it is developmental focussed
 - No strict policy regarding format/software used to record CPD. GSL now has an online reporting tool on the website
 - **MUST be in PLAN-ACTION-REFLECT Format**
- Each year approx. 3% of CGeol/CSci CPD records are audited by GSL

CPD Recording – GSL Template

Guidelines for Completing a Compliant CPD Record

APPENDIX 1 ~ Extracts of Example Pages from the New CPD Log Book



Geological Society's 2017 CPD System –Log Book for Recording CPD

Fellow's Name: ... William Smith

Bill

Personal Development Plan

CPD & PDP Year ...Year 2: (2017) 5-year CAP period ... 2016 –2020

My CPD objectives for the year ahead are:

- In 2016, I intend to enhance my detailed knowledge of health & safety – both legislative aspects and practical application to construction works
- Conduct wide-ranging research on the CPD that other professional organisations require their members to undertake
- Shadow the Chairman of a charitable trust with a view to election as Vice-chairman in 2018 or 2019
- Undertake sponsoring, mentoring, scrutinising and deferment reviewing duties for GSL when requested
- Keep my knowledge up to date with the current state in my specialist field

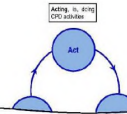


Table 1 – Activity Log for [year]

Date (dd/mm)	Category*	CPD Event – Brief Description	Time spent (hrs)	Evidence
10 Jan	IL	GSL WSW Regional Group Meeting: Dr A N Other: The influence of cinnoid assemblages on the stability of excavations ...	9	Annotated flyer
19 Jan	OJ	Board meeting of charitable trust – advice offered on geological conditions at a proposed new work site on a canal restoration	2	Minutes
25-29 Jan	SD	Internet research on H&S legislation and best practice	7	Notes etc, ex HSE website
03 Feb	OJ	Draft i) site induction for construction team; ii) risk assessments (5 nr); iii) 1 st 10 minute briefing notes	5	Docs prepared
05 Feb	OJ	Deliver i) site induction to team of 17; give them all the day's 1 st 10 minute briefing	1.5	N
29 Feb	PP	Detailed scrutiny of 2 applications for CGeol, in readiness for interview	4.5	CGeol ASS1n & CGeol ASS2n
04 Mar	IL	Attended lecture on the future of CPD in the healthcare sector	1.5	Annotated notes on handout
10 Mar	OJ	Reviewed NEC3 contract forms prior to commencing draft of tender documents for canal lock construction works	3	Notes

Table 2 – Summary of Times Spent on each of the main CPD Categories

CPD Category	On-the-Job (OJ)	Formal Learning (FL)	Informal Learning (IL)	Professional Practice (PP)	Self-directed Study (SD)	Other (O)	Total time	Carry over
CPD hours	11.5	0	1.5	4.5	7	0		
Additional CD # hours	—							
Total hours in year								

* CD refers to additional time on career development

Table 3 – I

Work Status of Fellow

Reflect

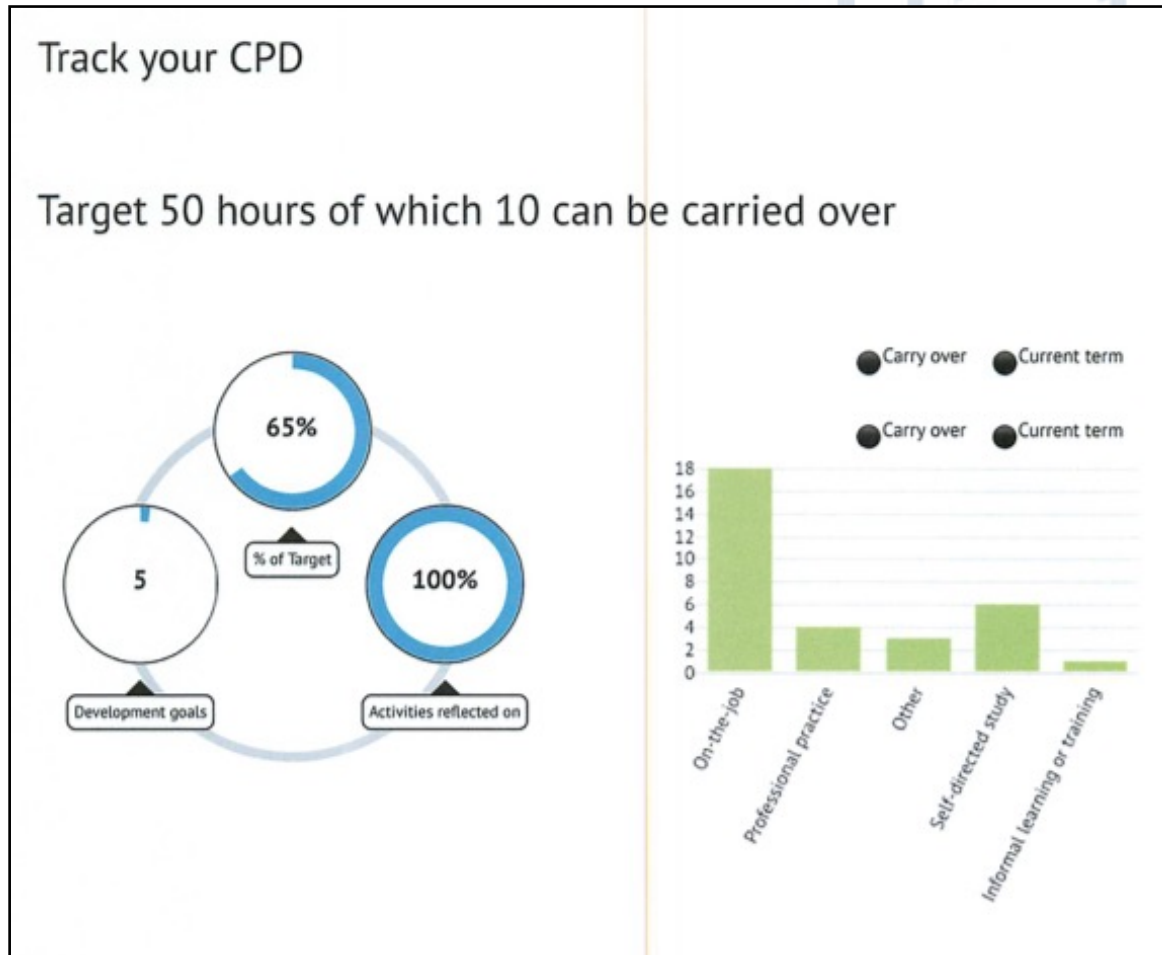
Reflection, ie, a review and discussion of achievements against goals set at the start of the year:

- My detailed knowledge of, and experience with, H&S matter as applicable to canal restoration projects, was met and exceeded. I was appointed H&S Director of the charitable trust mid-year and had to deal with (successfully) a serious accident on site – the trust's first such incident in its 40-year history.
- CPD research has been undertaken but incomplete – this is ongoing. Having researched over 20 professional organisations' CPD arrangements, it has been particularly interesting to find that there is much more to CPD than attending a short course or an evening lecture-technical meeting. There is also a very wide misunderstanding of what CPD really is, what counts as CPD and why it is so mission critical to one's career development.
- Shadowing the Chairman of the charitable trust of which I am the H&S Director is also ongoing, but on target for standing for election as Vice-chairman in 2018.
- I have acted as scrutineer for CGeol Applications 2016-2017. I have been supported by other scrutineers and sponsored one applicant. I feel this has been met.



CPD Recording – GSL Online Tool

(example)



AD4n (CPD) common pitfalls

- Make sure you follow the P-A-R format and meet the minimum required hours.
- DO NOT include large number of hours which cannot be supported – better to gradually add to the CPD record (base on “Mind Map”).
- Make sure all activity is DEVELOPMENTAL. This can be linked to company training objectives.
- Provide simple evidence of activity.

AD5n (Sponsor Statements)

- Eligibility for Chartership must be verified in writing (submission of Sponsor Reports AD5)
- Two sponsors required by the candidates:
 - Must know the candidate and their work for at least 3 years
 - Must be CGeol/CSci (some flexibility is permissible)
- Please seek prior approval from the CO if some flexibility is required.
- Make sure sponsors submit statements promptly (sent to Chartership@geolsoc.org.uk)

AD5n common pitfalls

- Ensure that you show your sponsors the entire application – they should provide critical and constructive feedback prior to submission, specifically regarding your competency.
- Make sure sponsor statements are signed and include Chartership details.
- Request your sponsors to submit their statements as early as possible. If late you may be postponed.

Supporting Documents



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Supporting Documents 1-6

- Up to 6 to be **carefully** selected projects.
- They do not have to be company reports.
- Need to focus on demonstrating your **own** work and application of **your** geological knowledge.
- They can be things such as interpreted cross sections, ground models, maps and diagrams which explain the geology/science underlying a project.
- Use hard-copy maps and material if required to ensure details are legible to scrutineers.
- Don't forget about the remaining competency criteria.

Supporting Documents - Examples

Applicants from the extractive industries (O&G, Mining, Quarrying) should manage to submit SD's NOT subject to strict confidentiality:

- Try and use work NOT subject to company confidentiality embargo?
- Use a Published paper, or Presentation from a Conference (identify your part in this)
- Choose a project – then write a description of it:
 - Explain the reasons for the project
 - Describe the type of interpretation undertaken and why
 - Use it to showcase Competency of the required criteria
- Draw geological cross-section from a published Geol.Map (eg. BGS Map)
- Submit Non-confidential field work notes/logged sections?

Supporting Documents - Issues

Applicants who work in Ground Investigations and Site Investigations often struggle to demonstrate Competency in Criteria ii (Critical Evaluation...generate PREDICTIVE Models):

- Work with what you have available but integrate everything – previous work (desk study or previous GI) and place in a Regional Context (? BGS Maps).
- Use any existing boreholes and determine if the model needs revision – where are the uncertainties, how can they be addressed?
- Demonstrate via well correlations/3D block diagrams what the uncertainties are and how new data may predictively change the model?

Supporting Documents - Pitfalls

- Do not swamp the scrutineers with huge documents (they have to read them)
- Add a Summary Page – explain what the SD's are, how they demonstrate competency, which ones and where?
- Perhaps show a map with SD locations highlighted?
- Clearly mark where in the SD's you are demonstrating competency in Criteria (i) to (vii)

Interview and Presentation

The Interview Process

- 2 Scrutineers interview the candidate against the 7 Competency criteria based on the Application Documents.
- Scrutineers make a joint recommendation to Accept, or Defer application for Chartership.
- Deferrals are reviewed by 2 new experienced scrutineers to ensure the decision is fair.
- Deferred applicants are eligible to reapply, taking into account guidance and feedback.
- Successful candidates are Elected to Chartership at the next GSL Council Meeting.

Interview Format

- 15 minute (maximum) presentation.
- Questions covering all of the Criteria.
- Be sure that you are *au fait* with all of the Submitted Documents, your work in those projects and your knowledge of the reasons for them.
- Be prepared to discuss examples of adherence to the Code of Conduct; your responsibilities regarding H&S; your planning of CPD; the boundaries of your competency

The Presentation

- **Do not** present on something that you have already submitted and which the Scrutineers have already read.
- **Do not** give a run through of your career/cv.
- **Do** find something that you are enthusiastic about and which you think demonstrates your competency.
- Include photos and diagrams.
- **Do make it interesting.**

And Finally.....

- REMEMBER – you are being assessed by your scrutineers for your competency as a **GEOLOGIST**
-not your competency to do your day-job!!

Chartered Scientist



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Chartered Scientist (Normal Route)

- Application process for CSci is identical to that for CGeol, but competency criteria are slightly different.
- At least one scrutineer will be CSci (and the lead interviewer).
- Applications for CSci are dealt with together with CGeol applications.

CSci Competency Criteria

- A. Application of knowledge and understanding.
(use of the scientific method)
- B. Personal responsibility *(work autonomously; H&S skills etc.)*
- C. Interpersonal skills *(Communication and Leadership)*
- D. Professional Practice *(planning and operating projects)*
- E. Professionalism *(Code Of Conduct; CPD)*

Other Routes to Chartership (CGeol & CSci)

- **20+ Year Route**

- Streamlined route designed for experienced applicants (>20 years post-graduation experience)
- Main difference from Normal Route is supporting documents (SD 1-6) and AD3 are NOT required

- **Retrospective Process**

- Streamlined route to 2nd Chartership within a maximum 2 year period.
- No requirement for interview and only 1 scrutineer reviews application.
- Submit updated CPD, complete new form and supply new info.

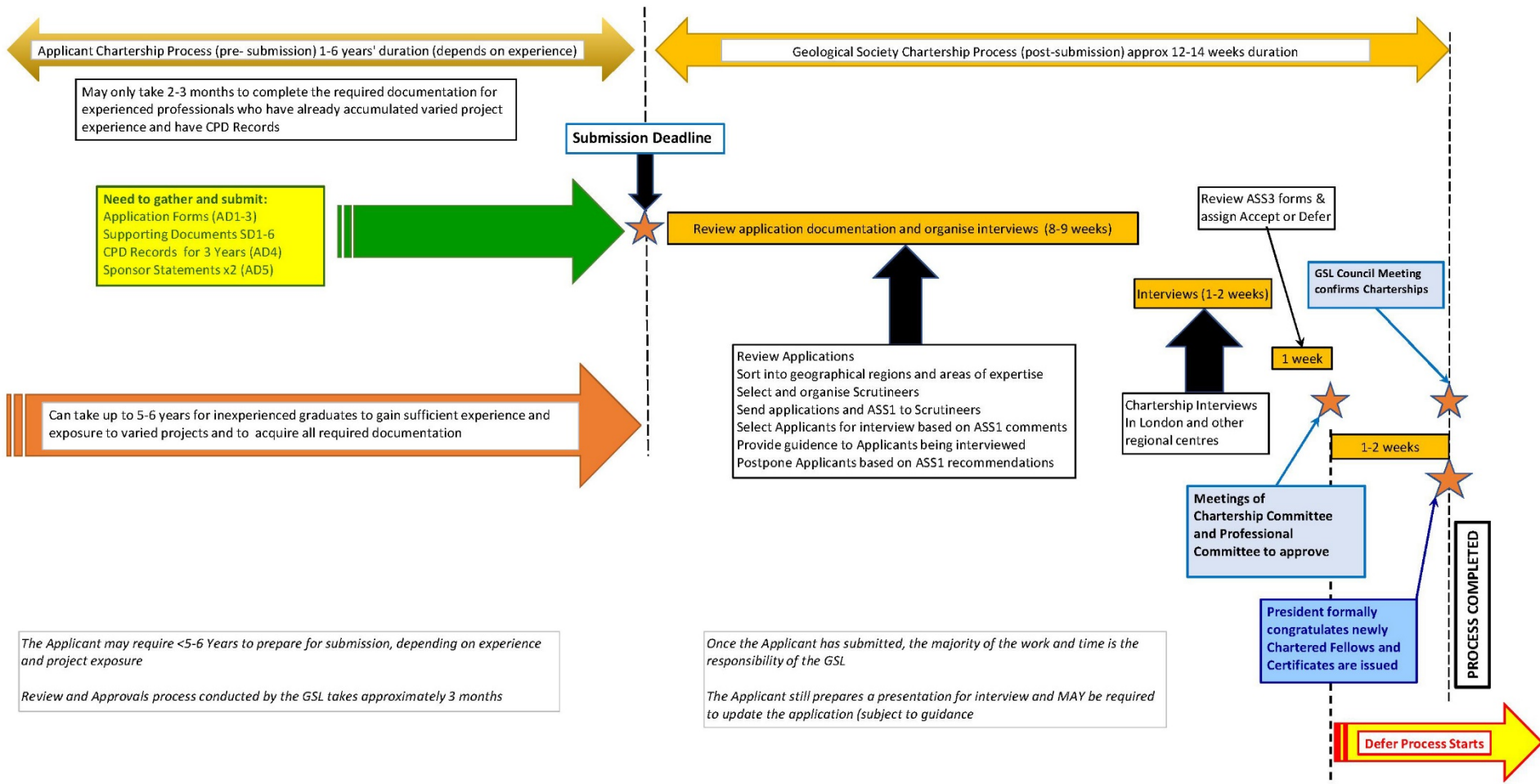
- **Reciprocal Process**

- The GSL has equivalence agreements in place to allow mutual recognition of each other's professional qualification.
- Current Agreements are with AAPG, AIPG and IGI. Working on more.

- **Reinstatement Process**

The Chartership Timeline

The Overall Chartership Process



Additional Information



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What next?

- Election to Chartership
- Continue to develop Professional Portfolio with appropriate CPD
- Apply for CSci as Retrospective application (within 2 yr)
- Look for other qualifications:
 - a. SiLC (Specialist in Land Condition Register)
 - b. RoGEP (Register of Ground Engineering Professionals)
 - c. Other Registers/EurGeol

Mentoring

- GSL has set up a LinkedIn Group which allows Fellows to ask for help or offer help as a mentee or mentor, or even as a sponsor:
- <https://www.linkedin.com/groups/8777938/>
- Be proactive and search for a relevant mentor within the group.

Request from WMRG Self-Help Group



WMRG Chartership champions:

Nick Watson

nick.watson2008@ntlworld.com

Alex Deltenre

alex.deltenre@atkinsglobal.com

Chartership meetings:

- Open forum to discuss the chartership application process.
- Identify areas where further support is required.

How will this be achieved?

- **Run self-help groups** to learn from other's experiences. Currently run at lunchtime over Zoom, but hoping to go back to the pub or around a table (with dial in option).
- **Invite speakers** to give short presentations on specific topics from all approaches (applicants, sponsors, scrutineers and GSL chartership officer).
- **Provide a platform to applicants** to practice their presentations to a wide audience.

Further Information

Shaun Richardson, Chartership Officer

Shaun.Richardson@geolsoc.org.uk

General Enquiries or submitting Information

Chartership@geolsoc.org.uk