

Guide for Assessors

Experience Assessment Committee

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Section 1: Experience Requirement Criteria

Both the Validation of Experience and the Alternate Route – Experience Stream give credit for experience. The experience requirements have been harmonized in the sense that the definition and criteria for experience are the same in the Alternate Route and in the Validation of Experience.

There are three aspects to HRPAs experience requirement. Experience must be:

1. in the scope of the practice of HR,
2. at an appropriate level (professional level),
3. acquired within the previous 10 years with at least three months experience in the previous two years ('recency' requirement)

Validation of Experience (VOE)

To be certified by HRPAs and earn the right to use the Certified Human Resources Leader (CHRL) designation, individuals must have at least three years (36 months) of demonstrated experience in HR at a professional level including at least three months in the previous two years.

Alternate Route (AR)

HRPA has developed an Alternate Route to meeting the coursework requirement. The Alternate Route is intended for individuals with advanced HR education and/or HR experience. To provide the greatest flexibility, a points-based system was developed that gives 'points' for experience, formal training, coursework, and other relevant designations. Fifty (50) points are required to pass the Alternate Route and meet the coursework requirement to be eligible to write either the CHRP Knowledge Exam (CHRP-KE) or CHRL Knowledge Exam (CHRL-KE).

Successful Alternate Route applicants who have a minimum of 36 months of professional level HR experience within the past 10 years including at least three months experience from within the past two years approved through the Alternate Route – Experience stream are deemed to have also met the experience requirement of the CHRL designation (VOE).

Scope of the Practice of HR

The definition of HR experience is any experience which falls within the scope of practice delineated in HRPAs Rules of Professional Conduct.

The Scope of HR Practice is the creation and implementation of all policies, practices and processes to effectively organize and manage all human capital resources in the workplace in service of the ultimate goal of enhancing business outcomes. Human resources management involves maintaining or changing relations between employees, between employers or between employers and employees.

The Practice of Human Resources Management includes, but is not limited to, one or more of the following:

1. The development and implementation of human resources policies and procedures;
2. Consultation in the area of human resources management;
3. Providing advice to clients, managers and employees in matters pertaining to management of human resources;
4. The representation of clients and organizations in proceedings related to human resources



management;

5. Program development and evaluation in the area of human resources management;
6. The supervision of other human resources professionals whether registered or non-registered;
7. Coaching of employees, managers and other individuals in matters relating to work and employment;
8. The conduct of research in the area of human resources management;
9. Teaching in the area of human resources management.

It does not matter whether one is working in a specialist position or a generalist position, and the title does not matter. The position should be reviewed based on the responsibilities being carried out.

To be credited toward the experience requirement, 51% or more of an applicant's activities must be in human resources as defined above. Beyond this, time should be credited proportionally. For instance, an applicant for whom 75% of their time is dedicated to human resources activities as defined above will have their time multiplied by .75. It would take four years of experience in such a position to be equivalent to three years of full-time experience in human resources.

➤ **General/line management work**

General management work may be considered if the human resources work comprises at least 51% and there is no HR department or manager in the workplace where the general management work takes place. The general manager must be the person who has direct responsibility and accountability for the strategy, design, implementation and coordination of one or more HR functional areas for the organization.

Work experience in a line capacity should not be credited towards the experience requirement; for example, a position at a managerial level with human resources responsibilities but not a human resources management position, i.e. Manager of Engineering, would not be considered as HR experience.

➤ **Small business owners/operators**

Small business owners/operators may gain suitable work experience towards the experience requirement provided that the business is established to provide HR advice. Time spent on business development and supervising staff for example, are not applicable towards the experience criteria. The remainder of the HR work should be prorated accordingly.

➤ **Employment lawyers**

Employment lawyers are able to meet the experience requirement; however, work experience advising clients or conducting litigation is not eligible. Applied human resources work experience for the law firm or a client, such as conducting labour negotiations or conducting downsizing activities, would be considered. Such activity must comprise at least 51% of the applicant's work experience and should be prorated accordingly.

➤ **Union employees**

Work experience gained while serving as a labour union representative or a union employee (such as a Grievance Officer) is not considered to meet the criteria towards the experience requirement unless these activities fall within a position clearly identified as an HR position.

➤ **Payroll**

Payroll is not considered to be within the scope of practice of HR. Time spent on payroll activities should not be counted towards the experience requirement and the remainder of the time spent on HR activities should be pro-rated accordingly.

➤ **HR consulting**

HR consultants can receive time for their consulting work. However, only the time spent advising clients on HR-related matters can be counted and time should be pro-rated accordingly.

➤ **Trainer**

A trainer can receive time for their training experience if they are part of an HR team within an organization and is specifically linked to an HR function as defined in the HRPA's Scope of Professional Practice. This experience may be considered, providing that full ownership of the training is demonstrated. The person must have direct responsibility and accountability for the strategy, design, implementation and coordination of the training (e.g. full development, assessment, testing, implementation and evaluation).

➤ **Employment counselling**

Unless they are counselling fellow employees on work-related and HR matters, employment counsellors would not meet the requirement of working within the scope of practice of HR.

Professional Level

In determining whether HR experience is at the professional level, the following factors are taken into consideration and **all** four dimensions must be met for the experience to be considered at the professional level:

- **Independence of actions** — relates to the amount of planning, self-direction, decision-making and autonomy involved in the work experience;
- **Depth of work requirements** — relates to the extent to which work experience requires information analysis and interpretation of relevant information;
- **Level of interaction** — relates to the degree to which the individual interacts with a broad spectrum of contacts, including decision-makers; and
- **Responsibility for work outcome** — relates to the level of accountability for work and decisions.

IMPORTANT: Positions are either professional or not. Time is not pro-rated for professional activities, only for amount of time in HR. While there are always administrative tasks involved in every job, it is up to the panel to determine if there is a balance between professional level and administrative duties enough for the position to pass as being at the professional level.

➤ **Junior level HR positions**

Junior levels within a human resources department performing administrative functions that are clerical in nature are not considered at the appropriate level.

➤ **Transactional work**

Transactional work is not considered to meet the professional level. Transactional means work that is of an administrative or support function, meaning, there is limited judgment, analysis or interpretation done to the data or information in the scope of the work.

Timeframe limitations

The experience must have occurred within the last 10 years to count towards the experience requirement and the individual must have worked in HR at the professional level for a minimum of three months within the last two years (recency requirement). If there is a significant absence from work (i.e. maternity/paternity leave), this absence should be noted on the application as time spent away from the job and should not be counted towards meeting the three years of experience required.

Experience criteria FAQs

Does work at a 3rd party outsourced firm meet the requirement?

Work at a 3rd party outsourced firm is usually managing a call centre or acting as a customer service representative who is receiving calls from client's employees. These positions are considered to be line positions as the person would be implementing a policy or procedure developed at the originating company versus developing and implementing policy developed by the 3rd party firm. These positions are following the terms of a contract that was developed by the client. If there are questions related to interpretation, this would be determined by a more senior position in consultation with the client.

How are military positions reviewed?

Most individuals in military positions are in line positions, unless the position is clearly in a role that defines the activities as HR, e.g., Recruitment Officers, Assessment Centre Officers where recruits are assessed for occupational qualifications. The GM role who has no HR position reporting to it, would not qualify because the military is highly regulated with policies and procedures that are established at the Central Command. Line managers are following policy and procedures that are highly regulated, developed and policed.

Can volunteer positions count?

Volunteer positions may be used towards time for the experience requirement as long as they are in HR at the professional level. They should be reviewed based on the same criteria as other positions.

What is the Early Assessment Opinion application?

You may from time to time see an application marked as "Early Assessment Opinion". This application is for those with at least one but less than three years of experience who wish to see if their experience will be counted towards the full validation once they have the required years of experience. These people would not technically "pass" the application as they wouldn't have the required years, but the positions should be reviewed the same way as other experience and the result is then sent to the applicant letting them know if their experience meets the criteria or not. The Early Assessment Opinion application is not advertised on the HRPAs website, but it is available upon request.

Section 2: Calculating Time Granted

Full-time job that is not 100% HR

If the applicant is working full-time but their position is not 100% HR, it is determined what proportion of this applicant's time is spent on HR activities. If this proportion is less than 51%, this position will not count. For a position that is between 51% and 100% professional level HR, time credited towards the experience will be prorated accordingly. Calculating the months of experience would start after one month of working in the role. For example, January 2020 – January 2021 would be 12 months.

Alternate Route Examples:

- If Position A was six months long (January 2020 – July 2020) and 100% of time was spent doing HR work, under the category of 5 points per year, the calculation would be:
 $(6 \text{ months} / 12 \text{ months per year}) \times 5 \text{ points per year} = 2.5 \text{ points}$
- If Position B was 16 months long and 75% of time was spent doing HR work in the role, under the category of 5 points per year, the calculation would be:
 $16 \text{ months} \times .75 = 12 \text{ months}$
 $(12 \text{ months} / 12 \text{ months per year}) \times 5 \text{ points per year} = 5 \text{ points}$

Validation of Experience Examples:

- If Position A was six months long (January 2020 – July 2020) and 90% of time was spent doing HR work, the pro-rated number of months spent in that position would be:
 $6 \text{ months} \times .90 = 5.4 \text{ months}$

Part-time work

Those who are working part-time at the professional level in HR should have their experience evaluated using the following criteria:

- Part-time work must add up to a minimum of 36 months of professional level HR experience using the guide of a minimum of 30 hours per week = one week of work.
- Regardless of how many hours are worked each week above 30 hours, one week = one week. For example, if two part-time jobs add up to 50 hours per week, those 50 hours constitute one week and the applicant will be given credit for one week of experience.
- Part-time work will be pro-rated accordingly based on how many hours/days of work/week and how much time is spent doing HR. For example, at 2.5 days per week it takes two weeks to get one week of work experience.
- Whether full-time or part-time, the position must be at least fifty-one percent (51%) in HR to be submitted. For example, two days per week in a position that is sixty percent (60%) HR could be used, but a full-time position that is only thirty percent (30%) HR does not meet the requirement.

No applicant can earn more than full-time credit for their HR experience. An applicant who is employed full-time as an HR professional and has additional part-time HR work will not be given credit for more than a full-time job (overtime or extra hours do not allow an applicant to earn more than one year of experience in a one-year timeframe). This means that an HR professional who has full-time HR employment and who teaches in addition to that employment will not get credit for more than a full-time job. However, part-time work in HR and part-time teaching can be combined to equal full-time HR experience.

Academics/Teaching HR courses

Teaching experience alone can be used to accumulate all three years of required professional level HR experience. In order to meet the requirement of being at the professional level in HR, courses taught must be:

- HPRA-approved courses, or
- HR courses taught at an accredited college or university.

If the HR courses and corresponding academic institution are not currently pre-approved, HPRA uses a third party credentialing body to determine if the college or university where the applicant provided HR instruction was accredited at the time they were teaching. If the institution is approved, the applicant can then move forward with submitting their time spent teaching the courses for review as part of their application. If a member's application is in front of you and they have been teaching, their experience teaching is considered to be at the professional level, however, it is up to you (the committee) to determine if the courses are HR courses or not. Faculty will need to send in a course outline so the determination can be made if the course is an HR course or not.

Teaching "full-time" means teaching a course load of at least three HR courses per semester for four semesters (Fall, Winter, Spring and Summer). HR instructors who are not teaching at least three HR courses per semester should have their time pro-rated as follows:

- Teaching one HR course per semester – 1/3 of 100%
- Teaching two HR courses per semester – 2/3 of 100%
- If the applicant develops the course, the committee will grant one-time development hours
- Time spent tutoring for an HR course will also be credited

HR Research

Time spent doing research in HR can be credited towards the experience requirement. The applicant would need to submit documentation to show how much time per month is spent on research, along with a summary of the research being conducted to determine if it's research in HR. The guideline of 30 hours per week = 1 week of work that is currently used to calculate credit for part-time work is also used to determine the amount of time credited for doing research. Research work can be combined with teaching to equal 100% full-time.

Calculating time granted FAQs

For the purpose of calculating time, do we assume the applicant is still in their most recent position as of the date of assessment?

Yes, if the most recent job indicates until "present" you assume they are still in the position and calculate the time as at the end of the current month. For example, if you're reviewing applications in April for the February submissions, calculate time until April.

How are points calculated for the Alternate Route?

There is a detailed outline of how points are allocated for the Alternate Route as part of each Alternate Route application package. Please refer to this to calculate how many points the applicant should receive based on the number of years of experience in that position and at what level you determine them to be at. Any points for courses taken or designations held will be indicated on the cover page by the staff support so you don't



need to calculate those points yourself.

For the detailed outline of how to allocate points for the Alternate Route, please also refer to Appendix A.

Section 3: Conducting the Assessment

Experience Assessment Committee Process

1. HRP A receives an AR/VOE application and staff reviews it for completeness.
2. The staff appoints panels to review the applications (each panel reviews applications every other month) and a Panel Chair is assigned for each panel.
3. Staff compiles applications on a monthly basis and emails the committee members with information regarding their panel group, number of applications, cover sheets and applications for assessment. Staff will provide a deadline for the Panel.
4. The Panel reviews the applications, completes the cover sheet for any declines and discusses results amongst themselves. Once the decisions are made, the results are compiled by the Panel Chair and emailed to the staff support by the deadline.
5. Staff support asks any follow-up questions regarding results (if any) and then drafts and sends out the result letters out to the applicants. Applicant has 30 days for appeal. Panel members should retain their notes until this 30 day period has passed and then confidentially destroy them

Review of submissions and panel discussion

The first step in the experience validation process is to determine whether the experience is at the standard of being jointly in HR and at the professional level and to do so for each position moving backward in time. The second step is to add up the cumulative duration of appropriate experience and to make sure it is from within the past 10 years with at least three months experience within the last two years.

Most of the time, you will review applications on your own, make your determination and then consult with your other panel members to determine if you all agree. Panel members are encouraged to have discussions by Zoom, MS Teams or teleconferencing to ensure that there is clarity, consensus and opportunities for verbal discussions. Majority rules so if two of three of you agree on a result, that is the final result for that applicant. If the panel consists of two members, both members would need to agree to pass the application.

Assessment template

A cover page is attached to the front of each applicant's package (see Appendices for samples). This should be used and completed by you when reviewing the application to ensure you are checking each required dimension and including notes when reviewing each position to determine your reasons as to why an applicant's position meets the requirement or doesn't. Using examples from the application will help to answer the question "Why does this position not meet the dimension noted or why is it not in the scope of practice of HR?" You can fill in your reasons directly onto the spreadsheet. This will help when sending the decision to the staff support so the decision can be accurately communicated to the applicant.

Decision template

When sending the final decision of the panel to the staff support, your reasons for an applicant's position(s) being unsuccessful should reference which of the dimensions of professional level are not being met, and why or why the position is not in the scope of practice of HR. What is it about the experience that is missing or indicates that the position doesn't meet that requirement? Examples from the application are a great resource and very helpful to the applicant who is receiving this information so they can understand where the

decision came from. For example, indicating “the position did not meet the dimension of professional level of depth of work requirements. This is because the position is coordination and moving information around rather than collecting and interpreting information to assist with decisions for the department and the organization” is the level of detail that is requested if an applicant’s position is being declined.

Conducting the assessment FAQs

In what situations would we ask the applicant to provide a reference?

Applicants are no longer required to provide references in their application. If references are provided, panel members are not required to contact them, nor are HRPAs support staff. That being said, they may choose to provide reference letters as supporting documentation, but not for the purpose of having panel members contact them for verification.

If we have a question, who should we contact?

Start by contacting the staff support with your questions. They should be able to guide you accordingly.

What if we are having trouble coming to an agreement?

While the Chair can’t make the determination for you, if you have a question about precedent or process, you can contact the staff support and they will contact another panel member to review the application.

Section 4: After the Assessment

Communicating panel decisions

Panel decisions are communicated to the staff support by the Panel Chair on behalf of all panel members. Panel decisions for declines should be sent via the assessment template which includes the notes for why the position(s) did not qualify. Passed applications should be communicated in the email to the staff support as well. The panel decisions are then communicated via email to the applicant. If an applicant passes, an email confirming this is sent. If an applicant fails, a more detailed letter with the reasons why their application was unsuccessful is sent. This is why completing the assessment template cover sheet is important as it contains the details required by the staff support to effectively communicate the decision to the applicant.

Destruction of documents – printed hard copies only

Committee members will retain applications/assessment documents for 30 days after a decision has been rendered. This aligns with HRPAs appeals process, wherein an individual has 30 days to appeal a decision. Since results don’t necessarily go out to applicants the same day that the panel sends the results to the staff support, it is recommended that panel members retain applications/assessment documents and their notes for 60 days after they have sent the result to the staff support to ensure that the adequate amount of time has passed. A decision to retain applications/assessment documents for any period longer than 60 days can be recommended for any application deemed to be contentious. In this instance, a panel may use their discretion to recommend the retention of their documents for a longer period of time and up to two years from the date of decision. Documents can be retained by the panel or returned to HRPAs office for their holding.

Panel members are responsible to ensure all applications/assessment documentation is destroyed at the

appropriate time. Applications/assessment documents can be destroyed in two ways; they can be shredded by the panel member or returned to the staff support at HRPAs office in a confidential and safe manner for shredding (HRPA will incur the cost of shipping). During Covid-19 pandemic, all applications are sent via email and no printed hard-copies are mailed to panel members.

Resubmissions

Applicants may re-submit their applications after an unsuccessful result. In these instances, if some time at the professional level has been previously granted, you will find this noted on the application by the staff support. This will alert you that this position has been previously approved and thus you can move forward with approving the experience in that position and determining the amount of time that the applicant has now spent in the approved position.

Appeals

After an unsuccessful result, an applicant has 30 days to appeal the result. The applicant can only appeal if they feel there was a flaw in the process of reviewing their application. Not agreeing with the result is not grounds for an appeal.

Section 5: The Experience Assessment Committee

Role of committee

The Experience Assessment Committee is a standing committee of HRPAs Professional Regulation and Standards Committee (PRSC). The Experience Assessment Committee consists of volunteers with the CHRL designation. The Committee is responsible for making determinations as to the appropriateness and adequacy of qualifications of individuals who have applied for accreditation by HRPAs in accordance with parameters developed by the PRSC and approved by the Board. Upon referral of the Registrar, the Experience Assessment Committee reviews and makes determinations pertaining to individual experience applications in accordance with the By-laws and Board approved policies.

Determinations with respect to the experience requirement are made by panels constituted by the Chair of the Experience Assessment Committee from among the members of the Committee.

Role of Committee Chair

The Chair is responsible for working with the staff support on business meetings, recruiting new members and any other committee-related business.

Role of Panel

Panels of the Experience Assessment Committee are responsible for reviewing and making determinations pertaining to individual experience applications.

As a member of the committee, you will sit on a panel every other month. Panel members receive an email notifying them that applicants are being sent, who their fellow panel members are, when the results are expected and also the assessment template cover sheets for their applications.

Panel members review their applications then confer with their fellow panel members to get a consensus or majority ruling on the application. Once this is done, the results are sent to the staff support via email by the due date.

Staff will review the results and will follow-up for any clarification and will manage any questions the panel has.

Role of Panel Chair

Decisions of the EAC Panels are deemed to be decisions of the EAC. Staff will appoint a Panel Chair for each panel whose role it is to make sure the decisions are drafted, approved and shared in a timely manner. While the Panel Chair is accountable for the decisions and reasons, they do not have to write it themselves. On occasion, a Panel Chair who has accepted this role may find later that they are unable to do the writing themselves and ask another panel member to do it on behalf of the panel.

Confidentiality

Each member of the committee signs the Code of Conduct each committee year which includes information about confidentiality. It is expected that panel members keep the results of their applications to themselves and only discuss the results with their fellow panel members and the staff support. If you have a conflict of interest with an application, you are expected to declare it immediately so the application can be sent to another panel for their review.

Appendix A: Calculation Guide for the Alternate Route Experience Categories

Categories that earn 10 Points/year:

1. Responsibility for overall HR function in a medium or large organization.

The definition of medium to large organization comes from the Business Dynamics in Canada Catalog 61-534-XIE Large is greater than 500 employees. Medium would then be interpreted as between 20 and 500 employees. It is assumed that in a small organization, the position responsible for the HR function would be responsible for other functions as well and therefore has to devote 51% or more of their time to HR. Small is less than 20 employees. If the Panel determines that a position does not warrant 10 points/year then the panel should consider granting 5 points/year, provided the position is in the scope of practice of HR and at the professional level, rather than declining the position due to a disagreed points allocation.

2. Practice in employment law (employment lawyers only)

Practice in employment law must be evaluated based the individual's practice with respect to corporate employment law. The definition of functional human resource management indicates that lawyers who provide employment law support to their firm's management or are retained to provide employment law support to another organization's management would be providing functional human resource support. Providing employment law to individuals is not functional human resource management. That encompasses only part of employment law (individual rights) whereas functional human resources must have the knowledge of both individual as well as management rights.

Categories that earn 5 points/year:

1. Experience at professional level in HR

This is any HR experience at the professional level.

2. Experience at a managerial level with significant HR responsibilities (51% of time or more)

Sometimes companies do not have an HR professional and a general manager takes on the HR duties and responsibilities. At least 51% of time must be spent doing HR work to qualify. Time will be prorated accordingly if time spent is not 100%.

3. Experience as an independent consultant in HR.

If the consultant is providing any of the HR areas defined in the HRPAs Scope of Professional Practice to their own organization and/or to a client organization's management, it is considered human resource management support. Providing any of the HR KSAs (knowledge, skills, abilities) to individuals or agents

of individuals is not considered HRM e.g. Career Counselors, Executive Coaches, School Placement Officers, EAP provider, Outplacement Consultants who only support the individual. Outplacement Consultants who also support management of client organizations in developing their outplacement strategies are providing HRM support.

4. Experience teaching an HR course at an accredited institution

- Recognized institutions would be those recognized by W.E.S. in Canada and/or another country.
- Full-time is teaching 3 courses per semester in HR or equivalent. Instructors must submit the institution's course outline to determine if the course is in HR.

Teaching one HR course per semester – 1/3 of 100%

Teaching two HR courses per semester – 2/3 of 100%

Other Categories

1. Completion of any of the approved HR courses – 5 points/per course

- Approved courses completed at an Ontario college/university
- Challenge exams offered by HRPA
- Courses taken via HRPA's Online Academic Program
- Courses approved under the Course Approval Process

2. Approved HR-related designations – 10 or 20 points

The following designations are worth 20 points:	The following designations are worth 10 points:
Payroll Leadership Professional (PLP)	Certified Training Practitioner (CTP)
Canadian Registered Safety Professional (CRSP)	Compensation Management Specialist (CMS)
Certified Benefits Professional (CBP)	Global Remuneration Professional (GRP)
Certified Compensation Professional (CCP)	Group Benefits Associate (GBA)
Certified Employee Benefits Specialist (CEBS)	Payroll Compliance Practitioner (PCP)
Certified Health & Safety Consultant (CHSC)	Registered Assessment Specialist (RAS)
Certified Training & Development Professional (CTDP)	Registered Professional Recruiter (RPR)
Global Professional in Human Resources (GPHR)	Retirement Plans Associate (RPA)
Indigenous Human Resources Professional Certification Program (I-HRP)	
Professional in Human Resources (PHR)	
Professional in Human Resources – International (PHRi)	