

# FELLOW UPGRADE APPLICATION GUIDANCE

Institution of  
**MECHANICAL  
ENGINEERS**

**Return your application to:**  
**Institution of Mechanical Engineers**  
1 Birdcage Walk  
Westminster  
London SW1H 9JJ

## For help with your application:

**UK telephone:** 0845 226 9191  
**Int telephone:** +44 (0)20 7304 6999  
**Fax:** +44 (0)20 7233 1654  
**Email:** [membership@imeche.org](mailto:membership@imeche.org)  
**Web:** [www.imeche.org](http://www.imeche.org)

## Guidance notes for application to upgrade from a Member (MIMechE) to a **Fellow** of the Institution of Mechanical Engineers (FIMechE)

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UPGRADE  
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Application to upgrade from a Member (MIMechE) to a **Fellow** of the Institution of Mechanical Engineers (FIMechE)

**About this form**  
Use this form if you are an existing Member of the Institution of Mechanical Engineers, and you want to apply for Fellowship (FIMechE). CEng, IEng and EngTech registrants can all use this form.  
If you are not an existing Member (MIMechE), do not use this form. Instead, please contact the membership team for information on how to apply for Fellowship.  
Before you begin this process you should be confident that you meet the current requirements.

**Eligibility**  
You will need to demonstrate that you hold a position of senior responsibility and have an established reputation as a Mechanical Engineer. You will also need to demonstrate a clear commitment to Continuing Professional Development (CPD).  
Successful applicants must provide objective evidence of the following qualities:

**Essential** - you'll need to provide strong evidence that:

- E1. you hold a position of senior responsibility and/or significant autonomy in your particular field
- E2. you can demonstrate leadership qualities
- E3. you influence policy and strategy making decisions in either a technical or business environment
- E4. you have a structured approach to CPD
- E5. you are engaged in the promotion of the engineering profession to young engineers and potential engineers

**Deftable** - you'll need to provide strong evidence of at least one of the following:

- D1. you have a highly specialist knowledge in a specific area of engineering
- D2. you have experience of technical or engineering resource management and/or personnel management and development

**Optional** - if you've only demonstrated one desirable quality, you'll need to provide strong evidence of one of the following:

- O1. responsibility for a budget and the associated risk
- O2. you apply a significant range of fundamental principles and complex techniques across a wide and often unpredictable variety of contexts
- O3. you engage in active development and application of new techniques in engineering and related areas at senior level

**It is not possible to provide evidence against all qualities, wherever possible.**

**The application process**  
Once you have completed all sections of this form, please return it to the address at the top of the page. Once we have processed your application we will let you know in writing whether it has been approved.

**This form has four sections**  
You must complete all sections before you submit your application:

1. About you
2. Your career history and organisation chart
3. Evidence of Fellowship requirements
4. Signatures

**Using this form**

- Please type using a black font
- Please fill in all applicable fields in this form

Further guidance for completing this form can be found in the guidance notes for this application, which should be read before beginning your application.

**FELLOW UPGRADE APPLICATION FORM**  
**INSTITUTION OF MECHANICAL ENGINEERS**

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## About these guidance notes

These guidance notes are to be used by existing Members of the Institution of Mechanical Engineers who want to apply for Fellowship. This process is available to CEng, IEng and EngTech registrants. Applicants who are not already Members can apply directly to Fellowship, but will need to contact the membership team for a full application pack and advice on the available routes.

To transfer from Member to Fellow you will need to be able to satisfy the Trustee Board that you hold a position of senior responsibility and have an established reputation as a mechanical engineer. You will also need to demonstrate a clear commitment to Continuing Professional Development (CPD).

The application process is straightforward. Please read and review these notes before starting your submission. To download and complete the application form visit [www.imeche.org/membertofellow](http://www.imeche.org/membertofellow). If you do have questions or queries at any stage of the application process, please contact our Membership Helpdesk on T: 0845 226 9191 or E: [membership@imeche.org](mailto:membership@imeche.org). For international callers, please dial +44 (0)20 7304 6999.

## Contents

1. Before you apply
2. Your application
3. Your checklist

## Appendix A: Evidence of Fellowship requirements

# Section 1: Before you apply

## Eligibility

Fellowship of the Institution is the most senior class of membership and therefore applicants are expected to demonstrate their commitment and practice of many of the following functions, attributes and qualities.

You will need to demonstrate that you hold a position of senior responsibility and have an established reputation as a Mechanical Engineer. You will also need to demonstrate a clear commitment to Continuing Professional Development (CPD).

Successful Fellowship applicants must provide objective evidence of the following qualities:

**Essential** – you'll need to provide strong evidence that:

- E1: you hold a position of senior responsibility and/or significant autonomy in your particular field
- E2: you can demonstrate leadership qualities
- E3: you influence policy and strategy making decisions in either a technical or business environment
- E4: you have a structured approach to CPD
- E5: you are engaged in the promotion of the engineering profession to young engineers and potential engineers

**Desirable** – you'll need to provide strong evidence of at least one of the following:

- D1: you have a highly specialist knowledge in a specific area of engineering
- D2: you have experience of technical or engineering resource management and/or personnel management and development

**Optional** – if you've only demonstrated one desirable quality, you'll need to provide strong evidence of one of the following:

- O1: responsibility for a budget and the associated risk
- O2: you apply a significant range of fundamental principles and complex techniques across a wide and often unpredictable variety of contexts
- O3: you engage in active development and application of new technologies in engineering and related areas at senior level

It is advisable to provide evidence against all qualities, wherever possible. In Appendix A you will find a table which shows examples of information that could be supplied for each quality.

The IMechE recognises that applicants for Fellowship may no longer have hands-on engineering responsibility and that their careers may have developed more broadly into senior management or into a specialist role. In some cases you may need to look to previous roles for evidence of the qualities. The assessors will take a balanced view on your entire career history since you achieved MIMechE registration, but it is your responsibility to show the assessors where you feel you have demonstrated the qualities.

Individuals who have retired from a position of senior responsibility but continue to demonstrate a continuing commitment to the profession within their CPD may be suitable for Fellowship.

The Institution believes that an established reputation is not necessarily dependent on holding a significant position of responsibility within senior management. Individuals who have made a sound and significant contribution as engineers are encouraged to apply.

## Section 2: Your application

### The application process

The application process is outlined below:

1. Complete an application form
2. Get support from two sponsors
3. Submit your application

### Completing your application form

#### General guidance

- Please type using a black font or complete in block capitals using black ink only
- Please fill in all applicable fields in this form
- Electronic copies of the application form are available from the IMechE website: [www.imeche.org/membertofellow](http://www.imeche.org/membertofellow)
- Talk to your sponsors before filling it in – understand what they want to see
- All answers should be written in the first person and exclude any company jargon and acronyms
- Include your name and membership number
- You can include photographs, sketches, calculations, diagrams etc. as an appendix
- Use an appendix for a glossary of terms if it's useful (not included in the word count)
- Please ensure that your application is proofread before submitting

#### Guidance on the application form

Support text is shown on the application form itself at the point of need:

##### Support text:

You'll find helpful support text at the point of need throughout the application form. It will always appear like this

## Completing your application form (continued)

### Section 1: About you

In this section we ask for your personal and employment details, as well as your area of expertise. You'll find all the guidance you should need within the application form.

### Section 2: Your career history and organisation chart

In this section you should provide a brief description of your current role, the organisation you work for and its objectives. You should also give a brief summary of your career history, providing an outline of each role held since election as a Member (MIMechE) and the dates the positions were held.

You should provide an organisation chart for your current employment which clearly shows your position within the organisation and any direct reports that you have.

### Section 3: Evidence of Fellowship requirements

You should provide objective evidence of the required qualities. Of the 10 criteria outlined, the five essential should be clearly evident from your application. There should then be evidence of at least one desirable and one other quality (from either the list of desirable or optional).

Refer to Appendix A for suggested types of information the assessor will hope to see for each of the qualities.

### Section 4: Sponsors

Your form will need to be signed by two sponsors who are registered engineers. Ideally, one of your sponsors will be a Fellow of the IMechE. Fellows registered with other Professional Engineering Institutions can sponsor you; we will check their registration against the Engineering Council database. Your second sponsor can be another Fellow or Member of the IMechE, or a Fellow or Member of another PEI. If you require any assistance with finding a suitable sponsor please contact the Membership team.

Your sponsors should read through your application and initial the Fellowship requirements to indicate that they have agreed with the information you have provided. They are signing the form to indicate that they believe you are suitable for consideration as a Fellow of the Institution of Mechanical Engineers.

## How we can help

If you have any queries regarding the application process you should contact the Membership team on **0845 226 9191**, if you are calling from outside the UK the number is **+44 (0)20 7304 6999**. Alternatively please send an email to **membership@imeche.org**

Member to Fellow workshops take place at various times throughout the year. To find out if a Member to Fellow event is taking place in your region please check the 'Near You' section of the website.

A sample application is available on our website. Once you have completed your application documents, please arrange to have an objective review carried out. This can be carried out by your sponsor, mentor or a colleague who's already registered. Alternatively, contact the Institution if you need additional advice. We can also arrange for an informal review of your CV to be carried out by one of our Professional Development Consultants, free of charge. The PDC will review your CV, advise you of any areas where they feel you need to provide more information and suggest any other pointers that you may find useful when considering whether to apply for Fellowship.

## What we look for

After we have checked that your application is in order, it will be forwarded to an experienced and trained Industrial Advisor (IA) for assessment. The IA may not be from the same industrial background to yourself so it is important that you provide accurate information in Section 3 of the application form and explain all technical terms.

The IAs are asked to score the Qualities on a scale of 1 to 4. The definitions for each score are set out below.

- 1: The evidence shows that the Quality is not met.
- 2: The evidence indicates that the applicant is marginally short of meeting the requirements.  
For example, the applicant may be undertaking some of the activities (described in Appendix A), but is not able to demonstrate that they are being done on a regular basis or fully at the appropriate level.
- 3: The evidence indicates that the applicant meets the requirements.
- 4: The applicant well exceeds the requirements.

The Industrial Advisor has several options available when they have finished their review of your application:

### **Elect to Fellow:**

You will have either met or exceeded the minimum score requirement: level 3 or above for all of the essential qualities plus two level 3 scores in the desirable qualities or one level 3 score in the desirable qualities and one level 3 score in the optional qualities.

### **Defer with guidance:**

You will not have met the minimum scoring requirement in some of the essential qualities. From the evidence provided it is clear that more development in your role is required, but the potential for a successful application at a later date is apparent. The assessor should provide guidance on areas that you should seek to improve before making another application; deferrals are not time sensitive and should therefore refer to quality outcomes, rather than duration in role.

## What we look for (continued)

### **Request additional evidence:**

You will have provided some evidence of the qualities, however, it may be insufficient for the IA to make a definitive recommendation to elect or defer; from your application it may seem that you are working at Fellow level, but more information on some of the qualities would assure the assessor that the qualities can be demonstrated. The assessor should provide detail of where the gaps in the application appear to be – this will be passed back to you. When the additional information is received the application will be sent back to the assessor to complete their review.

### **Recommend interview:**

Normally, the IA will have requested additional information from you before recommending an interview. This option may be treated as the 'last resort' when an applicant appears to be operating at Fellow level but may benefit from a face to face discussion with professional review interviewers. All recommendations for interview will first be reviewed by the Professional Review Committee (PRC) before we contact you. The PRC has the authority to elect or defer without an interview, if they deem this the most appropriate outcome. If the PRC decides that an interview is necessary, we will pass on some additional information about where the perceived gaps or weaknesses in your application may be as the interview will concentrate on these areas. This information will also be sent to your interviewers so that the discussion you have with them will be focussed and may not need to cover all of the qualities for Fellowship.

### **Not recommended:**

The applicant has not been able to demonstrate evidence at level 3 in any of the essential qualities. This recommendation should be reserved for applicants who do not appear to be in a role that will allow the qualities for Fellowship to be developed. Often, this recommendation will be used for applicants where a promotion or change of role would be required before Fellowship could be achieved.

## Committee approval

### **Professional Review Committee**

The Professional Review Committee (PRC) meets on a quarterly basis to consider all applications for Membership and Fellowship. The committee will review the recommendation made by the IA. At this stage the committee could also ask for further information from the applicant if there are any remaining areas of uncertainty within the paperwork. The PRC moderates all applications for Membership and Fellowship so that the same high standards are maintained, regardless of the route the applicant has taken.

Successful applicants will receive an e-mail, followed by a letter from the Chief Executive and the President of the IMechE confirming their achievement. Unsuccessful applicants will be written to by the committee secretary; they will be given detailed feedback regarding the reasons for this decision. A copy of the assessment paperwork completed by the IA can be sent to both successful and unsuccessful applicants for use in professional development.

### **Arbitration and Appeals Process**

The IMechE has an arbitration and appeals process in place which can be used by applicants who are dissatisfied with the assessment of their application. Unsuccessful applicants will be advised of the arbitration process when they are informed of the outcome of their assessment. In such cases all documentation will be made available to the Arbitration Panel and Appeals Assessors.

## Section 3: Your checklist

You should keep copies of all documents submitted to IMechE, as original applications will eventually be scanned and shredded.

Please check that you have included all the elements below before submitting your application. Incomplete applications will delay the application process and may result in your application being withdrawn.

Have you...

- ☐ Signed and completed the application form
- ☐ Included your application fee
- ☐ Had the sponsor information completed by both sponsors

# Appendix A: Evidence of Fellowship requirements

The table below shows the type of information that should be demonstrated in your application for each quality statement. This list is not prescriptive or exhaustive and therefore other aspects of your work can be used to provide evidence. Remember to provide objective evidence where possible.

## Essential qualities

E1: A position of senior responsibility and/or significant autonomy in your particular field

### Guidance on your answer:

An applicant must be **regularly** taking decisions or making judgements that are not essentially dictated by established rules or procedures and which have significant importance in relation to the Company, University or other organisation, or an element of the organisation, of reasonable size. This can be in either managerial, commercial or technical fields or a combination of these. The fact that a candidate's decisions may be subject to review or endorsement by someone more senior would not necessarily be an issue provided the initiative for proposing the decision lay with the applicant and their decision/judgement was normally accepted. For Consultants, whether or not they operate through a personal company, it is the nature of the work that they do and the level at which they interact with their customers which is important.

E2: Demonstrable leadership qualities

### Guidance on your answer:

This may be in terms of personnel and/or technical matters. There should be clear evidence of the applicants taking the **initiative** and others following their lead and not just because they are employed to do so. This can include offering advice which is accepted and acted upon in the case of consultants provided the context is sufficiently important. Evidence of leadership outside of employment can be taken into account but is not itself sufficient to satisfy the requirements.

E3: Influencing policy and strategy making decisions in either a technical or business environment

### Guidance on your answer:

The applicant should have an **influence** over the policy or strategy adopted by their employer or customer. This may not be direct control but there should be evidence that they have a significant input by way of working up proposals or are regularly consulted regarding important decisions and that their input is recognised. Straightforward changes to working practice within a candidate's role are not sufficient but a major change of approach or restructuring for which they were responsible could be.

## Essential qualities (continued)

### E4: A structured approach to Continuing Professional Development (CPD)

#### Guidance on your answer:

There should be clear evidence of continuing professional development. Ideally a record of CPD, including any published papers, should be attached but this is not essential where it is clear that **appropriate** CPD is being undertaken and that it is **planned** to meet existing and future career **needs**.

Examples of CPD include:

- Qualifications such as MBAs, or a diploma in engineering management
- Any relevant technical or business courses
- Conducting or attending workshops
- Attending, presenting, participating in seminars and conferences
- Presenting or attending lectures
- Writing technical papers
- Reading technical articles and journals
- Distance and open learning
- Updating in own and other fields of work
- IMechE meetings or events
- Other Professional Institutions work
- Active IMechE committee work
- Being an IMechE interviewer, Industrial Advisor or Assessor
- MPDS mentoring
- Learning a foreign language
- Involvement in government activities
- Community and charity work
- Training and assessment of young engineers

### E5: The promotion of the engineering profession to young engineers and potential engineers

#### Guidance on your answer:

There should be direct evidence of this. Where this is a function of the role, e.g. academic teaching, it may not be necessary to show anything beyond the job requirements where this is a significant feature of the job. In other cases the input of the applicant should be explicit. It should not simply be assumed that because a manager has a number of young engineers reporting to them that they will be promoting engineering to them. Conversely if it is shown that a manager actively ensures that their staff fulfils this role, they satisfy the requirements for this Quality. Evidence of involvement in the IMechE or other professional engineering activities will assist in meeting this Quality.

## Desirable qualities

### D1: Highly specialist knowledge in a specific area of engineering

#### Guidance on your answer:

This requires a level of expertise that has been developed significantly beyond that of a typical engineer in this field (at the appropriate level of registration). It is the sort of person that others working in the field will normally go to for advice in the specialism and someone who might be publishing papers relating to the specialism.

### D2: Technical or engineering resource management and/or personnel management and development

#### Guidance on your answer:

Evidence should demonstrate that the applicant has a significant management responsibility for staff and/or technical activities. The management of technical activities does not imply the same depth of knowledge as required at D1 but would imply a broader level of responsibility beyond being a technical specialist working alone. A Project Manager for a project or projects of significant size and complexity might have this quality provided they can demonstrate a track record at this level.

## Optional qualities

O1: Responsibility for a budget and the associated risk

### Guidance on your answer:

The applicant should have significant involvement in setting a substantial budget, whether for a department or a project, and **responsible** for managing (rather than just monitoring) it. This should be in a context where real management is required, e.g. managing a departmental budget consisting of principally staff costs would not alone meet the requirements and nor would managing a large project budget where it is essentially buying catalogue items of known cost with no requirement to manage risk.

O2: Application of a significant range of fundamental principles and complex techniques across a wide and often unpredictable variety of contexts

### Guidance on your answer:

The key words here are “significant range” and “complex techniques”. An applicant satisfying this requirement would provide evidence that they dealt with complex and possibly unpredictable problems that required the application of a range of engineering skills and principles either personally or that they supervised and guided those who were doing this. A manager with staff in a range of engineering disciplines or specialisms who plays an active role in resolving issues or an expert in an industry field who makes use of a number of different engineering principles in projects or tasks would satisfy this Quality.

O3: Active development and application of new technologies in engineering and related areas at senior level

### Guidance on your answer:

This requires evidence of initiation of, or significant role in, the development of new technologies, or the application of recent developments, rather than just being a team member. Evidence of a significant role in change management or leading significant continuous improvement initiatives in an engineering or manufacturing environment could provide evidence for this requirement.

These definitions are provided as guidance. The range of roles undertaken by Fellows is very wide and it would be impossible to encompass them all in the guidance. The guidance should be read as providing an indication of what is expected rather than specific requirements, i.e. the applicant may provide evidence that meets the intent without necessarily matching the specific examples.

Applicants should demonstrate a continuing involvement with Mechanical Engineering but do not have to be directly practising engineering at a hands on level. They should demonstrate that engineering knowledge is either a requirement of the role that justifies them being a Fellow or that it enhances their performance in that role in a meaningful way.