

Facing both ways: fulfilling the needs of client *and* candidate

Case study with AAT and RIBA



Susie Schofield writes: At FJ Wilson Talent Services (FJWTS) we work closely with professional membership organisations, awarding bodies, and learning providers. In the process, we have been fortunate to gain a number of insights into talent acquisition and management in these sectors.

Susie Schofield

Here we discuss with **Adam Harper**, Director of Strategy and Professional Standards at the Association of Accounting Technicians (AAT), **Lucy Carmichael**, Director of Practice at the Royal Institute of British Architects (RIBA), **Carys Rowlands**, Head of Professional Standards (RIBA), and **Adam Williamson**, now Head of Professional Standards (AAT) their thoughts on recruiting for member organisations' professional standards departments – looked at from both employer and candidate perspectives.

Part I: Professional standards

Working as a professional standards employee isn't a profession (like an accountant, lawyer, or doctor). Nor is it an obvious career route, so this can present challenges in finding high quality candidates.



Lucy Carmichael

Lucy explains: 'It's not a career. Individuals generally come from a legal background and tend to be interested in broader ethical issues. You're fishing in a very small pond. It's quite challenging finding the right person with the right skills and who is the right fit for your organisation'. Adam's experience of recruiting senior managerial positions within the professional standards team at AAT points to a combination of factors that make it difficult: 'These include the fact that it is a specialist area and therefore the roles you are recruiting for could be quite specific, or, if you are looking from someone with a membership organisation background, that can limit your pool'.



Lucy adds 'It's quite a challenge to find candidates. They have to have the ability to apply different skills in different settings'. You need 'someone who can quickly pick up the nuances of the sector, such as medical, architectural, legal. Regulation is a very broad spectrum'.

Lucy warns against those candidates who, at interview, state 'this is how we do things'. Such a rigid approach, or lack of adaptability to an organisation's culture, won't work. 'You need someone to adapt to new culture,' says Lucy. This includes 'the organisation's and profession's values – which won't necessarily be applied in the same way'. There is no one set approach to professional standards, some adopt an inquisitorial approach, others an adversarial one.



Adam adds, 'The fact that standards and related legislative issues tend to be profession-specific (so whilst you may find someone with relevant experience with another professional body, it may be from a very different industry),' this presents 'another related challenge'. Lucy elaborates: 'RIBA has peculiarities. You need to have regulatory knowledge, probably a legal background. But equally, having knowledge of the

Adam Harper

sector may qualify you to work in this area. 'It's not necessarily true that you'll find those skills in the same person. It almost becomes harder if you are a long-time employee in the same organisation in professional standards.'

The Head of Professional Standards at RIBA has a 'much broader remit than for other organisations': duties include 'managing the programmes for equality, diversity and inclusion, the specialist registers, and professional ethics. The person needs to have experience of managing projects and programmes. They don't necessarily have to be a case officer who has come up through the ranks'.

Adam and Lucy agree that the Head of Professional Standards role at their organisations is critical to their business. 'Given the risk to AAT's reputation should the standards of professionalism amongst our members fall below the levels expected,' explains Adam, 'Having someone head up our professional standards team is essential. In addition, given the rate of change across the profession, having someone who is able to scan the horizon and plan for the impact of future changes is critical. Maintaining the level of confidence that third parties and the wider public has in AAT's members is integral to ensuring the future prospects for AAT as a whole.'

At RIBA the role of the Head of Professional Standards is central to the organisation's success. Lucy elaborates: 'Unlike many professional member organisations, you don't have to be a



member of RIBA to be an architect. In essence, RIBA's members – both individual and corporate – buy into the higher standards set by RIBA. This – committing to our higher professional standards – is what it means to be a RIBA member.'

Part II: Trends

From AAT's perspective, Adam says:

Our experience is that there is a real balance at play. We need to be able to provide, through our professional standards activities, assurance that engaging an AAT member (whether as an employee or as a source of external accountancy support) provides a guarantee of professionalism and quality.

This drives a combination of factors to ensure proactive commitment amongst our members to relevant standards, and intervening appropriately where it may be the case that a member has potentially fallen short of those standards.

In addition, there are ongoing changes in external regulation that we need to ensure that AAT, as a professional body, and our members, adhere to. For example, through our role as a professional supervisory body for anti-money laundering.

There is an expectation in dealing with external legislators and government departments that they can further rely on the work we do in this area as a safeguard around their expectations; for example, HMRC being cognizant of the provisions we have in place that may give them assurances around the work AAT members do as tax agents.

The trend Lucy identifies is how regulatory bodies handle complaints; she believes that 'the shift in how regulatory bodies deal with complaints against their members is changing. Most decisions are now made on balance of probability, i.e. you need to be 51% sure that the complaint is valid rather than that a case is beyond reasonable doubt – which is the current RIBA standard of proof.

Lucy explained that this change in approach came after the [Harold Shipman](#) case: 'The standard of proof is different depending on the industry'.

How are RIBA and AAT leading in professional standards in accountancy?

Lucy explains that RIBA

has been monitoring and evaluating professional diversity and developing specific targeted activity to improve it. For example, Carys Rowlands [Head of Professional Standards] ran a [practice role model campaign](#) which demonstrated the contribution which those businesses which operate higher standards can make to society, the



environment, and the profession. RIBA also runs mentoring and mental well-being programmes for practices and individuals.

‘The main area we [RIBA’s professional standards department] are working on is professional ethics.’ Lucy continues:

We are looking outside the RIBA Code of Practice and beyond minimum professional requirements. For example, RIBA is using the [UN Sustainable Development Goals](#) as a framework to encourage architects to use their influence in overseas projects – where the regulatory systems might not be as robust as, say, the UK’s.

RIBA is advising its members on how to set the framework for ethical decision-making, on issues such as human rights, labour laws, anti-corruption, bribery - anything that influences the construction supply chain.’

Lucy explained that architects working overseas might come across modern slavery, the ‘gang master’ culture in the construction industry. ‘The RIBA is getting its members to think about how they might practise more ethically, how their work has an impact on people and the environment. We identify what the red flags are – around corruption and bribery, for example.’

At the start of this year, the RIBA launched its [Ethics and Sustainable Development Commission](#). The commission will consider how the architectural profession can best reflect its core values of public interest, social purpose and sustainability, including its engagement with the UN’s Sustainable Development Goals.

Adam points out that

the accountancy professional body arena is a well-represented one. There are numerous accountancy bodies and as a result AAT actively participates in the wider forums that exist. There are plenty of externally set standards that all of the various bodies will be required to adhere to. AAT aims to ensure that it does so in an exemplary fashion so that we can contribute to the wider public benefit, deliver confidence in the wider profession, and to raise the profile of AAT and our members in doing so.

AAT is developing its responsible business activities and the Head of Professional Standards is the business owner of that activity, developing the strategy and engaging with the whole organisation in a programme of activity that will further enhance AAT’s commitment to the responsible business agenda.

Part III: Specialist work

How important is it to have a recruitment consultant who understands the specialist nature of your business and its context?



‘Extremely important,’ was Adam’s reply: ‘Given the challenges that can be faced in finding a suitable calibre of candidates for specialist roles and functions, being able to rely upon a recruitment consultant who understands your organisation and what you are looking for is essential.’

Lucy first came into contact with FJWTS when her previous Head of Professional Standards left to a position in which FJWTS had placed him. Lucy immediately asked him, ‘Who stole you? I want to work with them!’

She knew that the role of Head of Professional Standards at RIBA was ‘critical to the business’ and that Lucy was ‘quite confident that we were not going to get the right candidate through the open recruitment process because it is such a specialist role and that there is a limited pool of candidates. We needed someone who was already in an equivalent specialist role as you can’t transfer skills to it.’

Adam expanded the point: ‘The risk associated with having unfilled positions is a significant one, both in terms of the time-commitment involved in going through an extended recruitment process or in terms of perhaps appointing someone who isn’t of the required standard.’

Lucy justified the expense of hiring a specialist agency by arguing that ‘with this particular role, we had to have continuity [of service] as the risk to the business was too great. We had to ensure a smooth transition.’

Working with FJWTS was, says Adam, ‘unlike any recruitment process exercise’ he has encountered. Fiona [Wilson] gave Adam ‘a lot of confidence in that she understood what it was I was looking for. There was no disconnect’.

After his first telephone call with Fiona, Adam went away ‘very confident that Fiona understood what knowledge, skills and expertise he was looking for’. And, Adam remembers, all the candidates presented by FJWTS were ‘clearly very strong candidates who met expectations and exceeded them’. Ultimately, Adam reports, ‘I couldn’t have anticipated [the recruitment] to have worked as well as it did. I’m really happy.’

Lucy concurs: ‘The cost of not getting the right person is high. If they are not a good fit they are much more likely to leave. Fiona helps find people to whom this would be a good move. She understands candidate-drivers.’ It means you’re ‘not recruiting in a panic’.

Lucy realised that to attract as many people as possible from a small pool she was going to need specialist help. In the end FJWTS put forward nine candidates in total and she found it difficult to shortlist as there were lots of good ones – ‘they were all interview-able’.

A year on, Lucy reports that ‘Carys Rowlands* has settled in well. She’s everything we hoped for in a sense. She’s knocked everything into shape, caught up on outstanding cases and brought about change. She’s highly regarded within the organisation’.



Part IV: Client experience

(A) The hiring manager: Adam Harper, Director of Strategy and Professional Standards, AAT

Experience of FJWTS

Adam has used FJWTS to recruit staff for several years, using both FJWTS's head-hunting service for senior management positions as well the standard recruitment service for more junior ones.

His first contact with FJWTS was via an hour-long telephone interview with Fiona [Wilson] which he found 'massively reassuring'.

Adam went away 'very confident that Fiona understood what knowledge, skills and expertise I was looking for'. They also spent time considering the cultural and team aspects of AAT which needed to be considered in appointing members of staff.

For a senior management position, FJWTS conducted a candidate-search and Adam was given regular updates. FJWTS met each of the candidates to discuss the role. 'Ultimately, a long list was presented' and candidates were listed on a grid on which they were graded for each criterion of the person specification.

Whilst FJWTS and Adam's views 'largely' agreed, there were a couple of candidates who Adam would not have selected from their written application but FJWTS could justify because the team had met the candidate concerned. Adam said 'it was a completely collaborative process'.

FJWTS nominated 'a great cross-section of candidates'. 'Every candidate presented well' and Adam was impressed that FJWTS gave him feedback from the candidates on how the process went for them.

How does FJWTS compare with other agencies?

Adam has used recruitment agencies before and, in terms of how his experience of other agencies compared with FJWTS, Adam said 'I would go as far to say the level of service offered by FJWTS is considerably enhanced', adding, 'it was significantly better than anything I'd experienced before'.

Adam said that the positive experience of using FJWTS 'reflects well on us as an organisation – if the candidates have had a similarly positive experience it bodes well for all parties. As an employer you want your organisation to be right for the candidate's career.'



Would Adam recommend FJWTS?

‘Absolutely... Ultimately, the experience was extremely positive.’ Adam wishes to reinforce that ‘I can’t have anticipated [the recruitment] to have worked as well as it did... I’m really happy.’ Working with FJWTS was ‘unlike any recruitment process exercise’ Adam has encountered. ‘Fiona gave me a lot of confidence in that she understood what it was I was looking for. There was no disconnect’.

All the candidates presented by FJWTS were ‘clearly very strong candidates who met expectations and exceeded them’.



(B) The candidate: Adam Williamson, now Head of Professional Standards, AAT

Adam Williamson was recruited to AAT by FJWTS. He had spent 17 years at RIBA, latterly as its Head of Professional Standards.

Adam recommended that his director at RIBA invite FJWTS to recruit his replacement, which she did. FJWTS were successful in recruiting his replacement.

Adam Williamson

Experience of FJWTS

Whilst Adam was not actively seeking a new job, he had been keeping an eye out for any interesting opportunities. Fiona first contacted Adam via LinkedIn about the role at AAT and sent him the job description for him to consider.

Fiona ‘strikes you as someone who knows absolutely what she is talking about’. Adam added that it was ‘very clear Fiona understood the organisation and what they were looking for’. Fiona and he also had a Skype conversation to go into more detail about the person specification of the job.

Dilly [Clack] then gave him a telephone interview and he found out a few days later that he had been shortlisted for a face-to-face interview. During this time, FJWTS were ‘excellent in keeping me informed and they responded very quickly’ to any queries.

Adam received ‘lots of offers of assistance’ prior to the interview and he spoke to Fiona ‘to go over stuff and to focus on the main points of what [AAT] were looking for’. This ‘was really helpful’ and it helped ‘clarify the issues in mind’. After the interview, Adam spoke to Fiona for a debrief.



Adam quickly found out that he had reached the second round of interviews.

At this point Fiona gave Adam 'detailed feedback' on his interview performance from AAT which was, albeit 'unusual,' it was 'hugely helpful and positive'. This allowed him to identify the points they were most interested in and to concentrate on these at the second interview. This gave Adam 'a positive state of mind'.

After his second interview, Adam had a debrief with Fiona on how it went. He found out from Dilly the next day that he had been successful.

Would you recommend FJWTS?

'Yes!'

Adam 'found FJWTS incredibly professional - they take the time to find suitable candidates and they do their homework. My experience is that recruiters put forward whoever is on the list, no matter what. This is a specialist area, so having this piece of work probably meant that FJWTS had similar candidates and this would save RIBA time'.

Adam 'was very impressed with the way FJWTS went about things' and he felt that FJWTS 'would probably bring in someone with experience and he could leave his job in safe hands'.

We asked Adam how he persuaded RIBA to hire FJWTS and he told us that 'my director was absolutely keen and asked to be put in touch with Fiona. My director realised this is quite a specialist area and that if there is expertise out there we should utilise it'. The position went out to a couple of recruiters. Adam said that 'my director was very impressed by FJWTS and less impressed by the others'. And FJWTS 'definitely got decent candidates in'.

Adam identified two key differences with FJWTS as a recruiter:

1. 'FJWTS have the knowledge of what they were looking for and who they were working with from an early stage. There were no surprises, everything that Fiona and Dilly said was true.'
2. 'The personal nature of the interaction. Very supportive. Very professional but very friendly. Always supportive but without being pushy. They were always quick to respond to queries.'

Part V: client and candidate experience

(A) The hiring manager: Lucy Carmichael, Director of Practice, RIBA



Lucy Carmichael was clear that it was her initiative to work with FJWilson Talent Services (FJWTS). When her long-standing Head of Professional Standards, Adam Williamson, handed in his notice she exclaimed, 'Who stole you? I want to work with them!'

Adam explained that he had been head-hunted by FJWTS and, according to Lucy, it 'was obvious that he was impressed by them'.

Lucy was impressed by how it had worked out – in that FJWTS found Adam and that he could progress his career outside RIBA. Adam hadn't been actively looking for a job and she knew that she didn't want someone who was looking for a job simply because they were 'at the end of their tether' in their current position. Lucy recognised that to attract as many people as possible from a small pool she was going to need specialist help.

Typically, RIBA uses an open recruitment process when hiring, so Lucy had to make a case to use a recruitment agency for the post of Head of Professional Standards. She said that the role was 'critical to the business' and that she was 'quite confident that we were not going to get the right candidate through the open recruitment process because it is such a specialist role and that there is a limited pool of candidates. We needed someone who was already in an equivalent specialist role as you can't transfer skills to it.'

Lucy justified the expense by saying that 'with this particular role, we had to have continuity [of service] as the risk to the business was too great. We had to ensure a smooth transition.'

Once she had the green light to use FJWTS, Lucy met Fiona Wilson who explained how FJWTS works. Fiona took the time to understand what was behind the job description and 'asked me in great detail about the sector, what qualities and skills we were looking for in this role'. Fiona 'asked the right questions'. FJWTS did a good job working within the budget. 'FJWTS understood that the type of candidates who would apply would be attracted to work for RIBA (rather than be driven by salary). FJWTS understands the candidate-drivers'.

Their meeting built 'my confidence in Fiona and her business. FJWTS got on with the recruitment process very quickly – much more quickly than had RIBA relied on an open recruitment process'.

All the candidates that FJWTS put forward were on a one-two months' notice period. There were ten candidates in total and Lucy found it difficult to shortlist as there were lots of good ones – 'they were all interview-able'.

In the final shortlist, Lucy confessed to struggling to decide which candidate to appoint, whilst admitting that

it was a very, very good position to have such good candidates. In the past, we have not always had a field to choose from.



The cost of not getting the right person is high. If they are not a good fit they are much more likely to leave. Fiona helps find people to whom this would be a good move. She understands what candidates are looking for in a role too. It means you're 'not recruiting in a panic'.

How does FJWTS compare with other agencies?

For this recruitment search, another consultancy also put forward a candidate who made the final shortlist for the role. Lucy said she felt she had 'a much more personal service' from FJWTS; for example, 'I felt FJWTS candidates were a closer match. FJWTS also kept me updated on progress and gave me feedback.'

The consultant at the other recruitment agency was away on holiday and the person overseeing her clients wasn't as well-briefed as she could have been. 'They were pretty shambolic. They missed deadlines – they kept sending me CVs to the point I had to ask them not to send any more!'

Lucy added 'what I valued most from FJWTS was the conversation I had with Fiona where I talked through my thought-process for selecting the right candidate. She didn't lead me but she gave me insight into the candidates. Fiona was a good sounding board. I really valued Fiona's help in the decision-making process... I really felt that Fiona knew her candidates'.



Lucy Carmichael (left) and Carys Rowlands

(B) The candidate: Carys Rowlands, Head of Professional Standards, RIBA



Experience of FJWilson

Carys wasn't actively looking for a new job but was on the look-out 'without doing anything about it'.

She was first contacted by Dilly Clack on LinkedIn to see whether she would be interested in a role she had in mind.

Carys was interested and Fiona followed up by emailing more information. Carys thought the job 'looked great' and was 'pretty keen'.

After speaking to Fiona Wilson and Gill Wilson for further details and a pre-interview, Fiona then put Carys forward for the role. Carys was impressed by the different ways FJWTS would contact her – 'via LinkedIn, emails, at whatever time of day was convenient to me'.

After receiving pointers from Gill and Fiona, Carys re-wrote her CV to tailor it to the RIBA job and to improve it overall. Very quickly, she was invited to a first interview. Fiona gave Carys lots of information on the RIBA and 'gave as much and as little information as I wanted'. Carys felt that FJWTS 'were really strong in their understanding about this role and the department'.

After the interview, Carys followed up with a call to Fiona where Carys gave her feedback. 'It's a really big part of the process – at that point things can come adrift with neither side knowing what the other thinks.' Carys was invited back for a second interview within a week.

Dilly rang to let Carys know she had been successful. Her contact with FJWTS continued – 'FJWTS was there throughout, answering any questions, asking if I had any concerns. They checked to see if my references had gone and that the contract had gone through.'

How does FJWTS compare with other agencies?

Carys used to work for a recruitment agency and said that 'FJWTS is streets ahead of most agencies I've come across. The client care, level of interest and knowledge of selection techniques, the candidate, the employer – they're a long way ahead of most places I've seen before. I felt well looked after, and well-informed.'

Carys was very impressed by the seamless sharing of information about her between Gill and Fiona. 'FJWTS alleviate stress. At any point you had doubt, something from FJWilson came to put you back on track.'

Carys didn't know if there were any other FJWTS candidates being put forward, saying 'I felt that it was me who [FJWTS] wanted to succeed. It was a very personal service. I was very grateful to them for the way they worked, taking time.'

FJWTS are straightforward to deal with: 'No games were being played.'