

SPECIFICATION ON RECOGNITION OF TRAINING COURSES AND TRAINING PROVIDERS

ISSUE 1

Document No: SC-11-002

SPECIFICATION ON RECOGNITION OF TRAINING COURSES AND TRAINING PROVIDERS**Classification**

This document and its annexes are classified as an IPC Certification Criteria Document.

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Authorisation

Issue No: 3 Draft

Prepared by: Secretariat

Date: 24/11/11

Approved by Board of Directors

Date: 24/11/11

Issue Date:

Application Date: Immediate

Name for Enquiries: Ms. Vicky Karvela

Contact Phone: +30 210 9945945

FAX: +30 210 9940408

Email: secretary@ipcaweb.org

Availability

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Forward by the Chairman of IPC.

I write this forward on behalf of the Board of Directors of IPC to explain you, the users of this new criteria, and how this fit into the IPC approach.

IPC provides specifications for the development of certification schemes that Certification Bodies for Persons can use to develop their own criteria for certification. Because ISO 17024 allows variation in how competence is demonstrated and consequently different Certification Bodies for Persons will interpret and apply this in different ways, providing a generic specification is the only realistic way of accommodating the flexibility of ISO 17024 while at the same time encouraging good practice.

ISO 17024 does not require Certification Bodies for Persons to include successful completion of a prerequisite training course as a requirement in personnel certification schemes. However, **it recognizes that training may be a requirement** depending on the industry context and needs. This document recognizes that in cases where training is identified as a scheme requirement, the training may take many forms and may serve various purposes.

IPC specifications do not mandate any specific way that Certification Bodies for Persons must design certification schemes or, where required, training course requirements. Instead, they offer a structure on a range of methods from which the Certification Body for Persons may choose. Even then, other methods not listed may be used if they are appropriate and are approved by the accreditation body.

On behalf of the IPC Board, I commend this new approach to you and look forward to welcoming new members and industry representatives to become part of, and to contribute to our new organization.

Giancarlo Colferai
Chairman, IPC

1. INTRODUCTION

This specification describes the fundamental principles for the design, provision and approval of training courses.

This document offers alternate approaches and methodologies for Certification Bodies for Persons and training providers to employ, along with the relevant stakeholder groups, when a training prerequisite will be included as one of the certification requirements in an accredited personnel certification scheme.

This specification does not substitute any applicable legislation and/ or national/ international standards for the provision of training courses and the certification of personnel.

The annexes provide a summary of good training practice and learning objectives that may be useful for specifying training courses where the PCB identifies a need for such courses as a prerequisite criterion for their certification scheme and for inclusion to IPC MLA.

2. TERMS AND DEFINITIONS

For the purposes of this specification document, the terms and definitions provided within the ISO/IEC 17024 standard, as well as the terms and definitions below, apply:

- 2.1 Applicant:** an individual applying for certification against a specific certification scheme.
- 2.2 Approval:** mechanism for controlling training courses and training course providers.
- 2.3 Assessment:** mechanism to measure a student's achievement of the training course learning objectives.
- 2.4 Certification process:** all activities by which a certification body establishes that an individual satisfies predetermined competence requirements, including application, evaluation, decision on certification, surveillance and recertification, use of statement or records and logos/ marks.

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- 2.5 Certification scheme:** specific certification requirements related to specified categories of individuals to which the same particular standards, rules and procedures apply.
- 2.6 Evaluation:** process that assesses an individual's fulfilment of the requirements of the scheme, leading to a decision on certification.
- 2.7 Examination:** mechanism that is part of the evaluation, which measures a candidate's competence by one or more means such as written, oral, practical and observational.
- 2.8 Examiner:** person with relevant technical and personal qualifications, competent to conduct and/or score an examination.
- 2.9 Training provider:** organization or individual approved by the PCB to deliver prerequisite training.

3. ESTABLISHING THE NEED FOR TRAINING

- 3.1** Completion of a specified training course could be a requirement for a personnel certification scheme. The PCB shall establish prerequisite training course requirements with key stakeholders for its scheme.
- 3.2** There are many reasons why a specified training course may be included as a requirement in the scheme, including:
- Training courses provide a benchmark for good practice.
 - Training may be a useful pathway to developing the competence requirements identified in the scheme.
 - Training and education may be absent from the sector or industry for which the scheme is being developed preventing potential applicants from developing the base skills and knowledge.

4 INDEPENDENCE OF TRAINING FROM EXAMINATION AND EVALUATION

- 4.1** PCBs shall follow the ISO 17024 requirements for the PCB to ensure that training is kept separate from any subcontracted examination activities carried out by training providers or its subcontractors.

5. ESTABLISHING TRAINING REQUIREMENTS

5.1 Learning Objectives:

- 5.1.1 The PBC shall establish training course learning objectives in terms of the knowledge and skills that the student must achieve in order to successfully complete the training.

5.2 Training Methods:

- 5.2.1 The PCB shall consider identifying the training methods that may be employed by training providers to deliver the training.
- 5.2.2 The training methods shall suit the learning objectives. The applied methods shall be defined and documented. Methods include, but are not limited to, the following:
- Classroom based learning - suitable for knowledge, skills training and practical activities.
 - Distance learning/self study - suitable for knowledge training and some skills training, but not all (for example fabrication or interpersonal skills).
 - On-the-job training - suitable for skills and some knowledge training.
 - Blended learning (part distance/self study and part classroom based) - suitable for a mix of knowledge and hard and soft skills.

5.3 Training provider competence

- 5.3.1 PCBs shall define and ensure that training providers have the competence to deliver training that meets the specified learning objectives and to assess individuals against those learning objectives.

- 5.3.2 Training providers shall have the following competences:

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- Technical competence - to deliver the knowledge and skills learning objectives (see 5.1). This may be demonstrated by individual (trainers/course designers) certification to the relevant personnel certification scheme.
- Training competence - to employ appropriate training methods (see 5.2). This may be demonstrated by a recognized training qualification or equivalent (trainers/course designers).
- Assessment competence (*if relevant*) – to employ the appropriate assessment methods and tools (see 5.3). This may be demonstrated by a recognized assessment qualification or equivalent (trainers/course designers).

5.4 Other requirements for training design and training providers:

5.4.1 PCBs shall consider, where appropriate, specifying the following:

- The course duration.
- Course attendance policy
- The ratio of trainers to students, including maximum student numbers.
- The course materials to be supplied to trainers and students.
- Student evaluation procedures.
- Rules for subcontracting training.
- Procedures for students to complain and appeal.
- Evaluation of training effectiveness

5.5 Records of training:

5.5.1 PCBs shall stipulate the records that will be generated for each student who completes the training and how long these records will be kept, including;

- The name of each student who attends the course.
- That date of the course attended by each student.
- If applicable, the outcome of each student's assessment against the learning objectives.
- The name of the trainer/trainers involved in the training.
- The attendance record of each student.
- The detailed course contents and learning objectives.

All of these records shall be provided to the student upon request.

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- A document, such as a statement or report, which shall be given to the student of the training course that will be accepted by the PCB as evidence of successful completion. This shall include:
 - The name of the student.
 - The name of the training provider.
 - The name of the training course.
 - The date of completion of the training.
 - A unique identification number.
 - A reference to the recognizing PCB and the IPC MLA in the following form (subject to translation): Recognized training course by {PCB Name or Logo} subject to IPC MLA {IPC Logo}.
 - The duration of the training course (in hours).
 - The issue date of the statement.

6 APPROVAL OF TRAINING PROVIDERS AND TRAINING COURSES

General requirements

The training provider shall:

be a legal entity

have demonstrated experience in providing the specified training

have access to competent trainers, up to date technical equipment, and the appropriate learning environment

6.1 Methods of approval:

6.1.1 PCBs shall consider the range of models for approving specified prerequisite training, including:

- Approving training providers' training courses designed against the PCBs training course requirements.
- Approving individual trainers as competent to deliver training that meets the PCB's training course requirements.
- Licensing training course materials developed by the PCB to approved training providers or individual trainers (if applicable).

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- Approving courses controlled by other training provider approval bodies (if applicable).

6.2 Monitoring training courses:

6.2.1 PCBs shall develop methods to ensure that:

- Training is consistently and effectively deployed.
- If applicable, student assessment is consistently and effectively completed.
- Appropriate records are maintained.

6.2.2 Monitoring methods may include:

- Witnessing the training provider/trainers delivering training/assessment at appropriate intervals.
- Review of training records, including student assessment records.

6.3 Management System requirements.

6.3.1 The training provider shall develop and maintain documented procedures for the effective administration of the course. Areas covered shall include:

1. The design, development and evaluation of updating course materials and documentation
2. The presentation of the course, its objectives and detailed course content.
3. The verification of prerequisite knowledge of students, where this is required
4. The control of courses presented through affiliate or franchise organizations and courses presented in other countries and in other languages
5. A document control system for maintaining the currency of procedures and course materials
6. The selection of ongoing training programs for trainers, the verification of trainer competence, annual evaluation of trainers performance, including criteria for determining satisfactory trainer performance.
7. Management review

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8. Records of individual students and each course offering, including analysis of course results
 9. Issue of statements or reports
 10. Storage and eventual disposal of records from each course
 11. Methods used to measure students' evaluations of the course content, instructor performance and overall course performance and implementation of needed actions
 12. Complaints
- 6.3.2 The training provider, instead of complying to above mentioned clause 6.4.1, can demonstrate conformance to this present clause 6.4 by providing a valid statement or record to latest version of ISO 9001 or ISO 29990, with the scope of provision of training courses, issued by an accredited management system certification body.
- 6.3.3 The training provider shall maintain records for the effective administration of the course. All records shall be maintained for at least eighteen months unless otherwise specified. The records for each course presentation shall include the following:
1. Venue, dates, related advertisement and promotional literature (e.g., direct mail, fax solicitation, email solicitation)
 2. Names of instruction team members (including substitutions), trainee instructors and observers
 3. Revision level of the course materials used
 4. Names of all students who attended the course, together with the evaluations of their achievement of the course's learning objectives (e.g., continual evaluation, written examination)
 6. Unique identification number of each statement or record of successful completion and the name of the student to whom it was issued
 7. The term of approval, the condition for withdrawal, what happens in case of complaints.
 8. The signed agreement between PCB and training provider

Annex A –Good Learning and Training Practice

This annex provides guidance on good learning and training practice for consideration by PCBs and training providers.

1. Introduction

The specification, design and delivery of training is often focussed on technical content and not on effective learning. This occurs because training course approval bodies, course designers and trainers tend to come from a technical background, but do not have the required training competence. The outcome of this approach is training with comprehensive content, but weak training methods which results in student learning that is not as effective as it might be.

2. 'Telling' vs 'Doing'

Research has shown that training by telling people new knowledge and explaining new skills is not as effective as allowing them to learn through active participation and self-discovery. Table 1 compares the effectiveness of only telling a student information as compared to providing a student with the opportunity to use the new knowledge or practice the new skill.

Table 1. Student Recall with Telling, Showing & Doing

	Telling	Telling & Showing	Telling, Showing & Doing
Recall after 3 weeks	70%	72%	85%
Recall after 3 months	10%	32%	65%

The challenge for many training providers is modifying their delivery style from the relative safety of 'telling' techniques to more effective participative methods both for learning new knowledge and new skills. The paragraphs below outline some techniques to make learning more effective. The outcomes shall be:

- Better learning for students.
- Improved training products for training providers.
- Improved standard of skills and knowledge in applicants for personnel certification.

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3. Using students' senses to help them learn and remember

Using people's senses has been shown to improve learning. Training course design shall take into consideration three important senses.

Table 2

Sense	Explanation	Good Practice	Practices to avoid
Visual	Visual learners enjoy reading and find images and pictures useful and very memorable.	<p>Include in materials a wide variety of images to support learning points.</p> <p>Include in materials as much colour and colour coding as possible.</p> <p>Display key learning messages on flip charts and wall posters (classroom training).</p> <p>Display student outputs on walls (classroom training).</p> <p>Consider use of video, pictures, photos, diagrams and charts to illustrate learning points.</p> <p>Ask students to create mind maps, flow diagrams etc on flip charts.</p>	<p>Avoid text heavy reading.</p> <p>Avoid simple black and white.</p>
Auditory	Auditory learners like to listen to new ideas and hear other people's ideas before they give their own or participate.	<p>Lectures/presentations.</p> <p>Encourage group discussions to explore new ideas.</p> <p>Use memorable stories and examples to illustrate learning points.</p> <p>Consider use of video.</p>	An average person's concentration starts to decrease after 20 minutes, so keep lectures as short as possible.
Kinesthetic	Kinesthetic learners tend to be outgoing and like practical activities, not listening or passive activities.	<p>Change students' physical position often.</p> <p>Use as much interactive activity as possible, such as role play, discussions, simulations, site visits, flip chart activities, working with flash cards etc.</p>	Do not leave students sitting down all day.

Most learners tend to prefer one style of learning but benefit from all three. Therefore, one of the keys to effective training is **variety**.

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4. Learning Environment

Students learn best when they feel relaxed and confident. However, when starting a training course many learners come with a range of concerns and worries, for example:

- Will I pass the course?
- Will the other students be better than me?
- Will I embarrass myself?

Consider the following techniques to help put students in a relaxed and confident state to make learning as effective as possible:

- Ensure that the classroom has:
 - plenty of natural light
 - space for students to move around
 - water available as required
 - a comfortable temperature
 - a seating plan designed for interaction, not passive listening
- Provide reassurance to students by:
 - providing pre-course information that includes a description of the purpose, content, training methods and assessment methods.
 - asking students to describe any concerns at the start of the course.
 - reassuring students (for example, if there is an examination explain the format and how they will be prepared for it during the course).
 - positioning the trainer(s) as facilitators to help them learn, not as intimidating experts.
 - devote a significant amount of time at the beginning of the course for students to meet each other and establish working relationships through non-threatening activities.

5. Learning Reviews

After each learning objective has been covered during a training course, both the training provider and the student shall be clear about how effectively the student has achieved the learning objective. This can be achieved by regular reviews of learning. Examples of learning reviews include:

- Informal written tests (e.g. quizzes) - to test student understanding

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- Self evaluation (e.g. completion of learning diaries by students) – for students to reflect on their learning and note what they have learned and areas of weakness they need to work on.
- Peer evaluation (e.g. feedback from other students on performance in skills based activities) – to outline learning and note what they have learned and areas of weakness they need to work on.
- Summarizing (e.g. mind maps created by students) – to summarize key learning points.
- Questions by the trainer – to test student understanding.
- Learning wall chart (students sign each learning objective when they feel they have achieved it) – to encourage students to review their own learning and identify areas of weakness.

Learning reviews shall take place often:

- After each learning activity.
- At the beginning of each day.
- At the end of each day.