900 - EDUCATION

A. Purpose

1. To ensure the membership and refrigeration industry is provided with Educational and Training material that conforms with the RETA mission statement “To Enhance the Professional Development of Industrial Refrigeration Operating and Technical Engineers”.

2. The Education, Marketing, and Certification Committees provide RETA membership and industry “Education” through publications, schools and seminars, industry training, and conventions to provide valuable resources to the membership and industry. The Publications and RETA workbooks include: Industrial Refrigeration I, II, III, and IV; Basic Electricity I and II; PSM/RMP Compliance Guidelines; Control Theory and Fundamentals I and II, Engine Room Safety Video; and Save Energy Wall Charts (plain and laminated).

B. Responsibilities

1. Continually review the text and graphics in RETA workbooks on a five-year cycle. This will be accomplished by a material review task force (for each publication) consisting of committee members, volunteers from the membership or the industry. The Chair and the Board President will select the task force members.

2. The Material Task Force responsibilities are:
   a. Lessons will be assigned to each task force member.
   b. Review lesson material and determine need for revision.
   c. All members of the Material Review Task Force and Authors are requested to sign a “Copyright release” to RETA. This covers CD and video material.
   d. The format for rewriting the text and graphics
      - Written material to be submitted in a Microsoft Word document
      - Graphic material should be in a JPEG or TIF format.
   e. The beginning of each lesson must have 3 or more objectives that will be accomplished in the lesson.
   f. Text material content must be directed to entry level person who wishes to enter the industrial refrigeration field and use as a correspondence source.
   g. The lesson should be written with a bold paragraph title as Refrigeration I “Revision”.
   h. Mini quizzes are not used.
   i. A copy of the lesson from all “Revisions” published will be provided as additional reference material.
   j. Authors must also provide bibliography on workbook material that has been added.
   k. Authors are asked to highlight areas where additional information and visual aids would help. They are asked for suggestions on supplemental visual aids; slides, overheads, video footage, graphs for use with instructor’s tools.
   l. The lesson (at the end) must include at least 15 multiple choice questions: five basic, five intermediate, and five advance level, referencing the material in the lesson. All answers to the questions must appear in the lesson material.
   m. Instructor’s Tools:
      1. Authors are asked to note any instructions that could be helpful for the instructor and mark material that should be included as transparency.
      2. Study hints the author feels will be beneficial should be included. The suggestions will be used in the workbooks and included in the instructor’s tools.
n. Graphics:
   1. All tables and charts should be in IP units, and if complicated, should be separated into 2 figures (a) – (b).
   2. All graphics, tables and charts inserted in the lessons should be as near the written explanation as possible.
   3. All graphics of piping should be color-coded and labeled according to IIAR Bulletin No. 114 and ANSI A13.1 (labeling).

o. Work book layout:
   1. Introduction – Forward
   2. Objectives of RETA – Industry History
   3. Study Hints
   4. Lesson (#1-10)
      - Lesson objective
      - Lesson
      - Lesson questions
   5. Glossary at end of book
   6. Final review of test (Course credit exam)
      The final test can be distributed by Headquarters and can be taken as a manual exam or on the Internet at RETA.com. Both services have fees.

C. Acceptable Electronic Teaching / Instructor Delivered Courses Using RETA Materials
   1. Instructors are allowed to project / present RETA Coursework via the Internet or other network means provided:
      a. Each student receives or has received a hard copy of the coursework material (RETA Book(s)) of the course being taught. The following are acceptable ways for the instructor to assure this has taken place.
         a. The instructor may supply the coursework material (RETA Book(s)).
         b. The instructor may have supplied the student the coursework material (RETA Book(s)) previously.
         c. The Student or the student’s employer may supply the coursework material (RETA Book(s)). In this instance the instructor should retain documentation (such as a statement from the student) that the student has procured the material independently.
      b. Instructors may generate a presentation with content from the RETA Instructor’s Tools CD or the RETA Book(s) for the purpose of supporting a presentation whether it is an in-person presentation or presented by electronic means at a distance.
         a. RETA material is to be credited as source within the presentation. Sources sited within the RETA material must also be credited.
         b. Instructors may NOT package a presentation product using RETA materials when this package is intended to be sold as a new product disassociated from the teaching services of the instructor. An instructor may make a copy of the training presentation available for the record of the student provided the provisions of D.1.a above is met.
D. RETA POLICY ON ENDORSEMENT OF TRAINING PROGRAMS

1. RETA has maintained a long-standing practice of encouraging alternate pathways for refrigeration operators to acquire the knowledge and skills required to perform their roles safely. While RETA commends training and scholarship programs that are designed to improve safety and practice in industrial refrigeration facilities, RETA does not endorse, sponsor or promote individual training institutions or programs.

2. RETA publications reflect the best judgment of its Education Committee on the content of effective training programs. Its Certification Committee documents the qualifications and requirements to receive RETA certification from its examinations and related programs. These RETA sources are available to all training organizations and vendors as resources to guide their efforts to assist possible candidates for RETA certification in meeting the objectives of RETA to promote safe and efficient operation of industrial refrigeration systems.

3. The instructors that have obtained the RETA credential “RAI®” have demonstrated mastery of the content of RETA educational materials and documented their ability to deliver a training message. RETA does not endorse any RAI educational programs they would operate as individual providers of instruction. RAIs are subject to the policies and requirements of the RETA policy and procedures manuals.
Appendix 900-A

RETA Book Review Process

1. 4 years after the most recent revision, the Education Committee Chairman with the assistance of RETA HQ, will request volunteers for a review sub-committee. The review sub-committee shall consist of at least 4 volunteer members and the RETA Education Coordinator, but a preferable number would be 6-8.

2. All RETA Authorized Instructors will be notified of the pending formation of the review sub-committee.

3. The Education Committee Chairman will select a sub-committee Chairman to lead the review sub-committee. The Education Committee Chairman in consultation with the Education Coordinator and the sub-committee Chairman shall designate a sub-committee scribe (The Education Coordinator is an eligible candidate and preferred for this position as the final formatting of the book will be completed by the Education Coordinator).

4. The review sub-committee will be selected by the Education Committee Chairman, the Education Coordinator and the sub-committee chairman, approximately 2 weeks after the initial request for volunteers.

5. The review sub-committee will receive via email, a markable copy of the title to be reviewed in PDF format.

6. Over the next 5 months the review sub-committee will, at their leisure, review the current printing and mark typos, mis-spellings, word-smithing passages and any content errors they wish to discuss when the sub-committee convenes.

7. Review sub-Committee members will receive reminder emails at the 3 month and 1 month dates which will be sent by the Education Coordinator.

8. 2 weeks before the Start date, meeting invites will be sent out for a one hour “kick-off call”.

9. On the kick-off call, the sub-committee will share schedules and determine the best meeting day/time for weekly or bi-weekly meetings. The duration of each meeting will also be decided.

10. During meetings, the sub-committee can only move forward with edits if there is a minimum of three committee members present. For this purpose, the Education Committee Chairman is a default committee member as is the Education Coordinator.

11. As changes are made, the sub-committee scribe will log any content changes (this includes updated graphics) on the edited document or in a separate document known as the “Change Log”. Typos, etc. will not be included in this log.

12. All changes made to the document will be recorded by the sub-committee scribe and stored on the servers at RETA HQ. In those instances where the scribe is an RETA employee, the scribe shall upload the redlined document at the close of the sub-committee meeting. If the scribe is not a RETA employee, the scribe shall email the redlined document to the Education Coordinator at the close of the sub-committee meeting who will then upload the document to the RETA server.

13. At the end of the review/change process, after the committee has approved their proposed changes, the Education Coordinator will ship a final version of the book to each sub-committee member.

14. Upon shipment, the reviewers will have 60 calendar days to review the book.
15. The markups will be sent back to the Education Coordinator. The review committee will meet to discuss all incorporations, comments and suggestions. Any changes agreed upon will be made by the Education Coordinator and documented as an addendum to the Change Log. The Review-subcommittee shall draft replies for any comments which are in dispute. These comments will be sent to the Reviewer. The reviewer may agree with comments, drop the matter entirely, or request a coordination meeting. In those instances, where a reviewer has requested a coordination meeting be scheduled. The scope of this meeting shall be limited to those areas of disagreement. At that meeting, the disagreeing reviewer will have an opportunity to discuss their disagreement with the review sub-committee. The Education Committee Chairman, Executive Director, and Current RETA National President shall act as arbitrator should the committee and peer reviewer be unable to agree upon a solution. A simple majority vote will determine the final resolution. Any further action will require the Board of Directors to take action (i.e. a motion, second, etc...).

16. Once changes are incorporated, a final version of the book will be sent to the current RETA Board of Directors, or future Board of Directors if within 60 days of the swearing in of a new board if it is a new book. Who will have 60 days to review the new book prior to board action. This sixty day review may be waived by unanimous board approval. If it is not a new book, the RETA Board of Directors do not need to review and approve.

17. Upon approval of the Board of Directors if it is a new book. The review process is now complete. At this point, RETA will begin to reduce their inventory of the “older” version. RETA will also communicate to institutions and instructors the approximate date that the new version will be in the RETA store and so they can decide when to purchase the new book as everyone’s on hand inventories will be different.