



THE SOUTH AFRICAN INSTITUTION OF MECHANICAL ENGINEERING

DOCUMENT ECPD 5 rev0

GUIDELINE FOR REVIEWERS IN THE VALIDATION PROCESS OF CONTINUING PROFESSIONAL DEVELOPMENT ACTIVITIES

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VALIDATION CRITERIA CHECK LIST

Validation CPD guideline for Reviewers - ECPD 5

1. INTRODUCTION

ECSA will institute a system, starting on 1st January 2006, which will require all registered persons to undergo Continuous Professional Development (CPD) in which they will attend approved activities and accumulate a specified number of credits. Failure to achieve the target number of credits could result in the withdrawal of registration.

ECSA has given approval to recognised voluntary associations (VA's) and accredited tertiary educational institutions to run their own activities. VA's have in addition been empowered to validate the activities of CPD Providers. These activities facilitate registered persons to achieve continuous professional development and obtain CPD credits.

2. PURPOSE

The purpose of this guideline is to give guidance on the validation process of CPD Activities by the SAIMEchE as a Voluntary Association to approved Providers. It also describes the process as to how the registered person submits the records of CPD activities that accrue credits.

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The approach adopted by the SAIMEchE is that the principle onus resides with the registered person to manage and acquire the necessary CPD credits. The system has been set up by ECSA and the SAIMEchE to facilitate on-line record keeping. Registered persons are required to update and submit their records to ECSA on form ECPD 1.

The SAIMEchE acts in the role of the Validator and does not undertake the role of any Provider. This would be a conflict of interest. The SAIMEchE may however assist the Provider in communicating with Institution members and arranging venue facilities.

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The SAIMEchE web site will list activities that it has validated for Providers and will display the procedures for CPD that both it and ECSA have developed. It should be noted that as registered persons can participate in activities that may not be directly validated by the SAIMEchE, the central register of credits will be based on the ECSA website so as to provide the mechanism for recording of activities validated by all other VA's.

3. SCOPE

This guideline covers the procedure to be followed when reviewing an application that has been received by the SAIMEchE.

CPD activities can generally be categorized as follows:

- focussed on a specific target group of Engineers, Technologists, Technicians and other specific grades recognised by the Council for the Built Environment with the objective of keeping them up to date at a professional level in a particular field of technology.

- focussed on a less technical broader interest group, where the activity is associated with the technical activity. For example Project Management, Presentation skills and Communications etc.

In general the CPD activity must enhance the competence and professionalism of the attendee in those functions that can be deemed to be necessary for the category of the registered person.

4. REQUIREMENTS FOR CPD ACTIVITY VALIDATION

CPD providers wishing to have a CPD activity validated, must submit to the CPD Review Committee of the SAIMEchE (CPDRC), under cover of a motivational letter, three hard copies of each of the following documents for each separate activity, and an electronic version on CD of the course content.

- ECSA Form ECPD 2 (Application for Approval of a CPD Activity)
- Addendum form ECPD 3
- Presenter's resume (curriculum vitae)
- Course/activity content notes
- Records of presentations of previous courses (if applicable)
- Applicable payment

5. COST OF CPD ACTIVITY VALIDATION

See ECPD 4 for a detailed cost table.

6. CATEGORIES OF CPD ACTIVITIES

The ECSA Policy Document lists three categories of activities for earning CPD credits:

- Category 1: Developmental Activities
- Category 2: Work-Based Activities
- Category 3: Individual Activities

The CPD activities dealt with in this guideline come under Category 1 Developmental Activities and cover the following:

Courses, Lectures, Workshops, Seminars, Tutorials, Colloquiums, Refresher Courses, Conferences, and Congresses.

A minimum of 1 Credit (10 hours) and a Maximum of 4 Credits (40 hours) may be obtained per annum in Category 1.

For example attendance at structured educational/developmental meetings will be credited with 1 credit per 10 hours of attendance. A full day activity will be regarded as 10 hours and a half-day as 5 hours, that is, half a credit.

7. CRITERIA FOR VALIDATION OF CPD ACTIVITIES

Once the documents covering the provider and activity have been received, the CPDRC will undertake the review function. It will have the discretion to appoint independent reviewers, knowledgeable in the particular subject, to

validate the CPD activity material. Their respective recommendations will be considered by the CPDRC and the course provider will be advised of the outcome and course validity status.

The criteria against which each provider and CPD activity will be evaluated will generally be as follows:

- a. **Institute/Company**
 - type of organisation
 - acknowledged standing
- b. **Presenter/s**
 - acknowledged expertise
 - appropriate experience
 - effective communication
- c. **Objective of Programme** - Evaluate in terms of:
 - what the course claims to be
 - for whom the course is intended
 - identification of outcomes/deliverables
- d. **Scope**
 - technical nature
 - adherence to good mechanical principles and practice
- e. **Contents**
 - clearly defined scope
 - appropriate technical level
 - appropriate standards
 - level of theory matching intended audience
 - quality of material eg. clarity of examples and diagrams
 - comprehensiveness
 - verifiable references
 - relevance
 - material should be mainly generic but product promotion should only be used to emphasise generic content
- f. **Activity support**
 - relevant documentation/notes
 - appropriate presentation material
 - clarity of notices
- g. **Cost for Attending Activity**
 - equitable cost for duration and scope

In validating / approving a Category 1 CPD activity, the SAIMEchE will ensure that the following points are covered:
(Extract from ECSA Policy Document)

- The activity should serve to maintain or enhance the knowledge, skills and competence of all those who participate in it.
- The activity should meet an educational and developmental need and provide an effective learning experience for the participants.

- The participants or group of participants must be specified (e.g. professional engineers, professional technologists, professional certificated engineers, professional technicians, registered technicians or a specified category, e.g. registered lift inspectors) and where appropriate, the discipline should also be specified.
- The depth and breadth of the subject matter covered must be appropriate with sufficient time for discussion.
- The subject covered should provide a balanced view and should not be unduly promotional.
- The presenters should have proven practical and academic experience and be good communicators.
- Evaluation forms for obtaining feedback from participants on the activity must be provided for rating of the relevance, quality and effectiveness of the activity.

8. VALIDATION

The Provider will be advised whether the CPD activity has been approved or not, together with comments on any additional information or issues to be addressed. Shortcomings and areas where the activity can be improved will be highlighted, but no recommendations or supplementary course material will be provided.

The validity period of the activity will be decided in the light of the perceived rate of change of the subject. The provider must undertake to advise the CPDRC of any significant changes that occur. Such changes would also have to be validated. The period of validity is 3 years unless otherwise advised.

The attendees are required to evaluate the course and its material on a prescribed form each time it is presented. Summary of the evaluations must be submitted to the SAIMEchE after each course.

When an activity is validated, the provider will be given a “**certificate of validation**” which can be used on the course documentation and in advertising the course. The validation and certification will also be posted on the SAIMEchE website in the list of validated activities.

Providers who have their activities validated for 3 years and during this time make minor changes, additions and enhancements to the content or structure of the activity without changing the objective must submit the revised programme to the SAIMEchE before being implemented. A review of the changes will be done by the CPDRC at no charge and if no concerns are raised, will confirm that the validation remains in force to the original validation date. This process is to ensure the Activity records at the SAIMEchE are updated but will not extend the initial period of validation.

9. BENEFITS

The benefits for a provider of a CPD activity that is approved by the SAIMEchE will be an acknowledgement to its members that the

provider and programme satisfies the CPD criteria, and that CPD credits can be earned.

A list of approved providers and programmes with associated detail will be recorded by the SAIMEchE and forwarded to ECSA and the publisher of the SA Mechanical Engineer.

CONCLUSIONS ACCEPTABLE / NOT ACCEPTABLE with reasons

Comments on how the activity will enhance the knowledge/skill and competence/ability of the attendee.



10. RECOMMENDATIONS (Approved / NOT Approved)

The SAIMEchE and its contracted reviewers undertake to preserve the confidentiality of the activity and will not divulge the whole or any part of the contents without written permission from the originator or Provider to any third party except ECSA and the CPDRC. Furthermore all the material and documentation supplied with this application shall be retained the SAIMEchE, and copyrights will be respected.

REVIEWER 1

- o Name _____
- o Title _____

- Company _____
- **Signature** _____
- Date _____

REVIEWER 2

- Name _____
- Title _____
- Company _____
- **Signature** _____
- Date _____

Annexure 1 to ECPD 5**GUIDELINE CHECK LIST FOR THE VALIDATION OF CPD ACTIVITIES**

ACTIVITY REF No

CATEGORY	ACCEPTABLE		
	Yes	No	Don't know
1. INSTITUTION/COMPANY <ul style="list-style-type: none"> ▪ acknowledged standing ▪ independent accreditation 			
2. PRESENTER/S <ul style="list-style-type: none"> ▪ acknowledged expertise ▪ appropriate experience ▪ effective communication 			
3. OBJECTIVE <ul style="list-style-type: none"> ▪ what the course claims to be ▪ for whom the course is intended (target audience) ▪ outcomes / deliverables 			
4. SCOPE <ul style="list-style-type: none"> ▪ technical nature ▪ good mechanical engineering principles 			
5. CONTENTS <ul style="list-style-type: none"> ▪ clearly defined scope ▪ appropriate technical level ▪ appropriate standard 			

<ul style="list-style-type: none"> ▪ level of theory matching intended audience ▪ quality of programme material, ie. clarity of examples and diagrams ▪ comprehensiveness ▪ verifiable references ▪ relevant ▪ undue promotion of products 			
<p>6. ARRANGEMENTS</p> <ul style="list-style-type: none"> ▪ relevant course documentation/notes ▪ appropriate presentation material ▪ clarity of notices 			
<p>7. COSTS</p> <ul style="list-style-type: none"> ▪ equitable costs 			

