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**THE SOUTH AFRICAN INSTITUTE OF
ELECTRICAL ENGINEERS**

DOCUMENT SAIEE CPD 07

**GUIDELINE FOR OBSERVERS IN THE VALIDATION PROCESS OF
CONTINUING PROFESSIONAL DEVELOPMENT ACTIVITIES**

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Observer's Validation Report CPD 07

1. BACKGROUND

ECSA has instituted a system, as of 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 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 SAIEE as a Voluntary Association to approved Providers. It also provides a guidance to the SAIEE Centres which will eventually award CPD credits. Note that the emphasis is on validation of the CPD Activity and not the provider.

3. SCOPE

This guideline covers the procedure to be followed when observing an event for which application for validation has been received by the SAIEE.

There is a separate guideline for Applicants see SAIEE CPD04 document.

CPD activities can generally be categorized as follows:

- focus on a specific target group of engineers, technologists, technicians or artisans 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.

4. REQUIREMENTS FOR CPD ACTIVITY VALIDATION

CPD providers wishing to have a CPD activity validated, should submit to the Validations Department of the SAIEE, under cover of a motivational letter, one hard copy of each of the following documents:

- ECSA Form ECPD 2 (Application for Approval of a CPD Activity)
- SAIEE CPD03 Form
- presenter's resume (curriculum vitae)
- 2 x copies full course notes + 1 CD copy
- Course brochure and programme of event
- course attendees evaluation sheets
- course completion certificates
- previous presentations covering when and where presented
- list of attendees at previous presentations and their comments

Note: 1 Form ECPD 2 is submitted to the VA by the Activity Provider for each activity. A record of approved activities will be kept by ECSA and the VA.

An additional electronic copy of the course and the notes and presentations on a compact disc CD is required.

5. 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 notional hours) and a maximum of 4 Credits (40 notional 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 notional hours of attendance. A full day activity will be regarded as 10 notional hours and a half-day as 5 notional hours, i.e half a credit.

6. CRITERIA FOR VALIDATION OF CPD ACTIVITIES

Once the documents covering the provider and activity have been received, (See section 4 above), the Validations Department will appoint a maximum of two independent observers, knowledgeable in the particular subject, to observe and validate the CPD activity. Their respective recommendations will be considered and the course provider will be advised of the outcome and allocated credits accordingly. 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
 - outcome statement
- d. **Scope**
 - technical nature
 - relationship to electrical engineering
- e. **Contents**
 - clearly defined scope
 - technically correct
 - appropriate standard
 - level of theory matching intended audience
 - quality of material eg. clarity of examples and diagrams
 - comprehensive
 - verifiable reference
 - relevance
 - material should be mainly generic but product promotion can be used to emphasise generic aspects.
- f. **Arrangements**
 - relevant documentation/notes
 - appropriate presentation material
 - clarity of notices

In validating / approving a Category 1 CPD activity, the SAIEE will ensure that the following aspects 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.

7. VALIDATION

The maximum two Reviewers will be required to review the material provided in accordance with the criteria given and prepare confidential comments and recommendations for the Professional Development Committee (PDC).

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 PDWG of any significant changes that occur. Such changes would also have to be validated. The period of validity is 3 years or less in special circumstances.

The attendees are required to evaluate the course and its material on a prescribed form each time it is presented. All evaluation forms will be sent to the Institute, as an ongoing quality check of relevance, quality and effectiveness of the activity.

Course providers are required to avoid making reference to commercial products in their course material and rather take a more generic approach. This does not mean that commercial products cannot be used in order to emphasize aspects.

Once the validation has been completed and processed, a Validation Advisory Letter is forwarded to the provider.

Providers who have their courses validated for 3 years and during this time make minor changes, additions and enhancements to the content or structure of the course without changing the objective, must submit the revised programme to the SAIEE before being implemented. A review of the changes will be done by the appointed Reviewers 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 SAIEE are updated but will not extend the period of validation.

8. BENEFITS

The benefits for a provider of a CPD activity that is approved by the SAIEE will be an acknowledgement to its members that the provider and programme satisfies the Institute's criteria and that CPD credits can be earned.

The CPD validation listing will be reflected on the SAIEE and ECSA websites for reference by members.

The SAIEE will in future be providing for its members a category for preferred providers, who will be 'endorsed' by the SAIEE. This will allow the SAIEE members to follow links directly to providers' websites for more details on courses provided.

9. SUBMISSIONS

CPD providers should submit their details and programmes to the Institute for validation at the following address:

**Sue Moseley
CPD Validations
Professional Development Committee
South African Institute of Electrical Engineers
18A Gill Street
Observatory, Johannesburg**

Phone: 011-487-9047

Fax: 011-487-3002

Annexure A


**CONFIDENTIAL
DOCUMENT**

**THE SOUTH AFRICAN INSTITUTE OF ELECTRICAL ENGINEERS
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SAIEE OBSERVER REPORT ON ACTIVITY**

COURSE/ ACTIVITY NAME	ABB CUSTOMER WORLD AFRICA DAYS 2018
VALIDATION No	SAIEE-2209-V
PROVIDER	ABB SOUTH AFRICA
Date of Activity	10-11/4/2018
Venue of Activity	SANDTON CONVENTION CENTRE, JOHANNESBURG
NAME OF SAIEE OBSERVER	LUNGILE PEGGY LUHLANGA

Please rate the following aspects of the course or activity

	Aspect of Course / Activity	Excellent	Good	Fair	Poor
1	Arrangements during the session				
2	Lecture Presentation Style & Quality				
3	Pace of Delivery of Presentation				
4	Level of Engineering Quality				
5	Course Notes - Quality & Relevance				
6	Content of Lecture or Talk				
7	Amount of Theory & I Level				
8	Practicals & Tutorials if relevant				
9	Venue Suitability & Catering				

Specific Questions	Observer Comments or Remarks		
Amount of Advertising & Commercial content?			
Your impression of attendee satisfaction?			
Your Assessment of CPD content?			
Any topics that should have been omitted?			
Any topics that should have been included?			
Assessment of overall professionalism?			
Assessment of attendee response to course?			
Any hidden agendas that are of concern?			
Assessment of presenters' response to questions?			
Process Check List	Yes	No	Remarks
Were Attendance Lists provided			
Were Feedback Forms provided & collected			
Were Certificates Issued to Attendees			
Did you Receive Reviewer Reports			
Was any other VA validation done			

Other Comments or Remarks

Do You Agree That Course Activity deserves 1 CPD Credit **per day**?

SIGNATURE

Date

