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Manual

CONTINUING PROFESSIONAL DEVELOPMENT

(CPD)

MANUAL

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DOCUMENT SAFA CPD 01 OVERVIEW TO THE CONTINUING PROFESSIONAL DEVELOPMENT (CPD) MANUAL OF SAFA

INTRODUCTION

The main purpose of this Manual is to serve members of SAFA in the implementation of the statutory requirements of CPD which become effective from 01 January 2006.

The manual has been prepared with a vision of providing members and providers of activities for ongoing professional development an understanding and proffer background information into the processes that have been developed to facilitate compliance with the statutory requirements for the renewal of professional registration.

Some background to the process that were adopted to introduce CPD in accordance with the broad framework set out by the Engineering Profession Act 46 of 2000 and the policy of the Engineering Council of South Africa (ECSA) is contained in this manual. The essential elements of CPD as compiled by the Professional Development Working Group (PDWG) of SAFA are also outlined.

Hopefully the contents and layout of this manual will serve as a guideline document going forward from January 2006. At the outset the strategy has been to regard this manual as a working document in progress because while the concept of CPD may not be new, the structures and processes to govern it are, and it is envisaged that they may change and be amended from time to time as experience is gained.

PROCESS ADOPTED BY SAFA

The core business of SAFA is to serve its members. With this in mind Value Chains were developed for CPD and the identified tasks in these Value Chains were allocated to members of the PDWG to address. The idea was to have the output of these efforts summarised in a CPD brochure that SAFA can present to its Members and to Industry. Furthermore, the brochure could become a standard mailing item when mail shots are done and should adorn the reception areas of all Higher Learning Institutions, ECSA, Industries and of course SAFA. The brochure must also be on the SAFA Website and linked to other appropriate Voluntary Association websites for easy access to any interested person.

The strategy of developing high level processes for CPD within SAFA, given the circumstances, is to develop the whole process and make controlled amendments from time to time as CPD becomes an integral part of the professional life for all registered engineering practitioners.

ESSENTIAL ELEMENTS OF CPD

The contents of this Manual constitute the essential elements of CPD. To this end the appropriate legislation and policies have been included.

Also included are guidelines for mentoring because these activities allow credits to be claimed by the experienced engineering practitioner and therefore forms a vital element in the professional development of all engineers.

VALIDATION PROCESS

It is important to note that structures set up within SAFA have been arranged so that the process of validating an activity is entirely separate from the overall management of CPD. This is necessary to facilitate an ongoing independent review of the process where decisions and awarding credits to activities/events is determined. Similarly the ongoing monitoring through the feedback from attendees and SAFA representatives who attend validated activities will be done by this separate management stream.

Any activities run internally by SAFA are subject to the same process of validation as for any external provider applying for validation. Apart from an identical process of review, the same fee structure is applicable to both internal and external activities.

Similarly appeals against validation decisions will be managed entirely separately from the validation business process.

CONCLUSION

Every effort has been made to address all the aspects pertaining to CPD as envisaged by the PDWG of SAFA. Should the reader become aware of shortcomings or inaccuracies in using this document, it would be in the interests of the Electrical Engineering fraternity that these be brought to the attention of the SAFA Chairman in order for the manual to retain its intended purpose.

ACKNOWLEDGEMENT

The South African Flameproof Association (SAFA) hereby acknowledges the South African Institute of Electrical Engineers (SAIEE) for allowing permission to use their generic document.

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DOCUMENT SAFA CPD 02

GLOSSARY TERMS USED

- **Activity:** courses, lectures, workshops, seminars, congresses, tutorials and refresher courses that apply for validation and awarding of CPD credits whereby attendees may claim the allocated CPD credits when renewing registration.
- **Categories of Registered persons:** Professional Engineer, Professional Certificated Engineer, Professional Engineering Technologist, Professional Engineering Technician who are registered with the Engineering Council of South Africa (ECSA).
- **Continuing Professional Development (CPD):** Achieved by attending Activities to enhance professional competence and gaining new information and knowledge.
- **CPD Credits:** activities merit CPD "Credits" according to Section 9 of the ECSA Policy.
- **CPD Activities:** activities that have been validated.
- **ECSA:** the Engineering Council of South Africa.
- **Discipline:** Registered persons within the Electrical Engineering fraternity.
 - **Professional Development Working Group (PDWG):** The SAFA committee responsible for the management of CPD matters.
 - **Providers:** Any agent, institution or individual who requires that their Activity allow attendees to claim CPD credits.
 - **Renewal of Registration:** Every 5 years registration must be renewed with ECSA. CPD requirements must have been met. ECSA will have records of the activities that have been attended by the registered person.
 - **Registered Persons:** Registered with ECSA who must accumulate CPD credits over a 5 year period in order to renew registration.
 - **Reviewers:** At least two reviewers are appointed in the validation process, preferably one academic and one field expert to review/approve the application for an activity to be validated.
 - **SAFA:** South African Flameproof Association.
 - **Sample Audit:** A random selection of registered persons is contacted annually by ECSA to check whether they have complied with the CPD requirements.
 - **Voluntary Associations (VA):** Associations such as SAFA that have applied for and are registered as a VA by ECSA.
 - **Validation:** The process of reviewing and approving applications for a CPD Activity by the Voluntary Association in order to award CPD credits.



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FORM ECPD 2

**APPLICATION FOR APPROVAL OF A CONTINUING PROFESSIONAL DEVELOPMENT
(CPD) ACTIVITY**

Please complete and return to:
 S.A. Flameproof Association
 PO Box 868, Ferndale, Randburg, 2160

1. BODY APPLYING FOR ACTIVITY APPROVAL IN TERMS OF ECSA CPD POLICY	
1.1 Name of body	
1.2 Postal Address	
1.3 Telephone number	
1.4 Fax number	
1.5 E-mail address	

2. PERSON WHO ACTUALLY IS RESPONSIBLE ON BEHALF OF THE APPLYING BODY	
2.1 Initials and Surname	
2.2 Title (Prof/Dr/Mr /Ms)	
2.3 Position held by responsible person in body	
2.4 Direct contact telephone number	
2.5 Cellular telephone number	

3. ACTIVITY OFFERED
<p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>

APPLICATION FOR APPROVAL OF A CONTINUING PROFESSIONAL DEVELOPMENT (CPD) ACTIVITY

(continued)

4. DETAILS OF ACTIVITY	
a) Title Activity	
b) Name of Presenter/s	
c) Duration of Activity	
d) Target Participants: (Discipline and Category of Registered Persons)	
e) Is the activity promoting a product?	

5. MOTIVATION FOR ACTIVITY TO BE APPROVED
.....
.....
.....
.....
.....
.....
.....
.....

Evaluation forms for obtaining feedback from participants for rating of the relevance, quality and effectiveness of the activity, must be attached to this application.

I, on behalf of the

.....
(name of the body) hereby certify that I am fully aware of the statutory requirements of continuing professional development as described in the ECSA Policy Document and undertake to comply with the requirements of serving as an approved provider for this activity.

SIGNATURE

DATE

POSITION HELD IN BODY

PLACE

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**SAFA ADDENDUM TO THE ECSA APPLICATION ECPD 2
 DOCUMENT SAFA CPD 03**

The purpose of this SAFA addendum is to outline the criteria of work for the various categories of Registered Persons and to assist the applicant in answering Question 4d of the ECSA Application Form CPD 2.

Please indicate by placing a cross next to the set of applicable criteria below:-

Activity will benefit persons involved in :-	Activity is focused towards persons carrying out :-	Mark X
<p>..well defined electrical or electronic engineering work characterized by :-</p>	<p>Application of established procedures, practices, standards or codes in engineering activities. Management & operation of routine engineering processes. The implementation of standard engineering systems and solutions or straightforward projects, and routine maintenance of engineering infrastructure.</p>	
<p>..broadly defined electrical or electronic engineering work characterized by:-</p>	<p>Application of current engineering technology. The management & operation of modern engineering solutions and processes. The introduction of modern engineering services & management methods. Management & implementation of broadly defined engineering projects & maintenance of engineering infrastructure. Management of moderate risks in engineering processes, systems, equipment & infrastructure. Involvement in specific contexts with moderate / high risks in legal aspects pertaining to the management of proficiency & competence in the transmitting & conversion of all forms of energy in mines, works, factories or ships.</p>	
<p>..complex electrical or electronic engineering work characterized by:-</p>	<p>Application of fundamental principles in the development & application of new technologies. Using advanced design methods or promoting introduction of new techniques or concepts. Pioneering new engineering services & management methods. Involvement in engineering design, field engineering and research. Management of high level risks in engineering processes, systems, equipment & infrastructure</p>	
<p>.. the business arena and registered persons doing electrical or electronic engineering. The Activity is a complementary module to enhance professionalism and competence by :-</p>	<p>Enhancing the financial management knowledge of a registered professional person. Developing the general business competence of a registered professional person. Dealing with a specific electrical or electronic engineering aspect as it applies to the business environment. Dealing with a specific business aspect that applies to electrical or electronic engineering. Pertaining to the management of assets and audit processes. Generic information and practices that would enhance competence of a registered professional person. Project management processes and practices using innovative tools and principles. Computer applications and information systems for enhanced and expeditious delivery of projects [?] Exploration of the application of new or developed materials. General and personal management theories and techniques for enhanced performance. New or amended legislation pertaining to engineering practitioners.</p>	

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DOCUMENT SAFA CPD 04

GUIDELINE FOR PROVIDERS MAKING APPLICATION TO HAVE AN ACTIVITY VALIDATED

This guideline is for any person or organisation wanting to award credits for a CPD Activity. The following procedure must be complied with if validation by SAFA is required.

1. EVERY APPLICATION SUBMITTED TO SAFA FOR THE VALIDATION OF CPD ACTIVITIES MUST COMPRISE THREE BOXED HARD COPY SETS AND AN ELECTRONIC COPY ON A CD CONTAINING THE FOLLOWING:
 - 1.1. Completed ECSA Form ECPD 2.
 - 1.2. Completed SAFA addendum to the ECSA Form ECPD 2 indicating the type of activity.
 - 1.3. Proof of payment of fees for the application (see par 2 below).
 - 1.4. Credentials of the course presenter. Presenters should have proven practical and academic experience and be good communicators.
 - 1.5. Sufficient information to enable SAFA to allocate CPD credits, including all course material and a description of the method of presentation should be provided.
 - 1.6. The SAFA Document on Criteria for Awarding CPD credits provides further information on the requirements.
 - 1.7. A sample of the certificate to attendees.
 - 1.8. A sample of the feedback questionnaire from attendees.
 - 1.9. Agreement to a maximum of two SAFA Representatives to attend the Activity free of charge.

2. SAFA LEVIES FEES FOR APPLICATIONS AS FOLLOWS:-
SAFA Members:
 - 2.1. R4 000, 00 for the first course day for applications submitted at least 3 months before the starting date of the Activity.
 - 2.2. R1 500, 00 for every extra day of Activity.
 - 2.3. R6 000, 00 for the first course day for an accelerated assessment for less than 3 months notice and R2 000, 00 for every extra day of Activity.
Non-SAFA Members:
 - 2.4. R4 000, 00 for the first course day for applications submitted at least 3 months before the starting date of the Activity.
 - 2.5. R1 500, 00 for every extra day of Activity.
 - 2.6. R6 000, 00 for the first course day for an accelerated assessment for less than 3 months notice and R2 000, 00 for every extra day of Activity.

 - 2.7. Proof of payment must accompany the application form.
 - 2.8. The payment is non-refundable, whether or not SAFA validates the activity for CPD credits.

3. RESULTS OF VALIDATION PROCESS

- 3.1 Formal assessment reports will be returned to SAFA from the appointed Reviewers whereupon a formal reply will be made in a letter to the applicant within a month of the application. CPD points awarded to the Activity will be advised in the letter.
- 3.2 The Reviewer reports are confidential and will become the property of SAFA.
- 3.3 The Reviewers appointed sign a confidentiality clause and will return all documents to SAFA on completion of the review.
- 3.4 Approval will be provisional until feedback has been reviewed. See Item 9 below.

4. NON-APPROVAL OF ACTIVITY

- 4.1 In the event of SAFA not approving the activity for CPD credits, the applicant may add to the content or introduce changes to the activity and may re-submit the application within two weeks to be re-assessed. Each applicant will be allowed to re-submit an application only once. Thereafter it will be considered to be a new application and fees will have to be paid as for any new application.

5. APPEALS

- 5.1 Appeals against a decision by SAFA can be lodged at SAFA Johannesburg offices where it will be referred to the Professional Development Working Group whose decision will be final.

6. ATTENDANCE REGISTERS

- 6.1 It is the responsibility of the person or organisation presenting the Activity to keep a register of everybody attending the activity. The register must provide the name, surname, verification details and contact details of each attendee. A South African ID number, or ECSA registration number will be regarded as sufficient for verification. An e-mail address or telephone number will be regarded as sufficient contact details.
- 6.2 After the Activity, the Provider is responsible to ensure the organiser provide the SAFA Secretariat with a copy of the register within 2 weeks.
- 6.3 An example of the certificate given to attendees must be supplied with the Application.

7. CERTIFICATE OF ATTENDANCE

- 7.1 The Provider will be responsible to ensure the organiser give each attendee a certificate as proof of attendance to the Activity. Registered persons may attach the certificates to their professional registration renewal application to ECSA. The certificate must display the name, time(s) and date(s) of the Activity, as well as the number of CPD credits that the Activity has been awarded.

8. ATTENDEE FEEDBACK

- 8.1 The Provider is responsible for ensuring the organiser obtains feedback from attendees of the Activity. A sample of the questionnaire must be included in the application. Ideally comments eliciting satisfaction around enhancing the competence and professionalism of attendees is required to be sought in the questionnaire in addition to a list of questions with tick boxes which must accompany the application.
- 8.2 The Provider must make provision to allow a maximum of two SAFA representatives to attend the activity. The purpose is to allow appointed officials to feedback to the PDWG on quality, compliance or any other aspect to ensure the aims and objectives of the ECSA Policy on CPD are achieved.

9. PROVISIONAL APPROVAL

- 9.1 Applications will be flagged as provisionally validated for 3 months until the feedback above has been received.
- 9.2 The feedback will be reviewed and if satisfactory, then the application documentation will be flagged accordingly and the course will be validated for three years from the date of the first Activity.
- 9.3 If the feedback is considered unsatisfactory, the provisional validation will be withdrawn and flagged accordingly.
- 9.4 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 SAFA 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 SAFA are updated but will not extend the original period of validation.

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VALIDATION PROCESS COST STRUCTURE
DOCUMENT SAFA CPD 05

TYPE OF ACTIVITY EVENT	CHARGE FOR VALIDATION PROCESS	RULES
1 SPECIAL ACTIVITY Presidential Inaugural Address Presidents Invitation Lecture Monthly Meeting including talk etc Faraday Lecture IEE, IEEE Meetings & Lectures	R 0.00	<p style="text-align: center;">No Charge for Attendees</p> The lecture, talk, presentation and or technical debate must be part of the proceedings. Maximum CPD Credits per activity of this nature is 0.1 Credits. An electronic or hard copy of talk, presentation, agenda to be made of activity Office Bearers, Center Chairman with one other to review the talk etc and award CPD credit if warranted Standard Reviewer Report to be completed & forwarded to SAFA Jhb. Attendance Register to accompany Standard Reviewer Report where SAFA Director will allocate official CPD Number to the Activity. Honorarium permitted but not direct payment for activity
2 SAFA RUN CPD ACTIVITY Tutorials Workshops Technical Workshops General Conferences or Congresses Visiting Expert / Lecturer Seminars / Colloquiums Refresher Courses	Standard validation fee as in 3 below	<p style="text-align: center;">Charge for Attendees</p> Validation is valid for 36 months from date of first activity. Sponsors will be permitted for aspects of the activity. Committee arranging the activity to provide a budget scenario for approval and include complete sponsor information. Standard procedure for validation of activity will apply as detailed in 3 below. Events Committee and Treasurer as well as PDWG to be involved in the final approval Validation process can be done by SAFA Members or Appointed reviewers.

**VALIDATION PROCESS COST STRUCTURE
DOCUMENT SAFA CPD 05**

(continued)

TYPE OF ACTIVITY EVENT	CHARGE FOR VALIDATION PROCESS	RULES
<p>3 EXTERNAL CPD ACTIVITY PROVIDER</p> <p>Tutorials Workshops Technical Workshops General Conferences or Congresses Visiting Expert / Lecturer Seminars / Colloquiums Refresher Courses Product Promotions New Technology Application</p>	<p style="text-align: center;"><u>SAFA members:</u></p> <p style="text-align: center;">R4000 for first day of CPD Activity. R1500 for every extra day of Activity.</p> <p style="text-align: center;">R6000 for first day of CPD Activity if fast tracked and R2000 for every extra day if fast tracked.</p> <p style="text-align: center;"><u>Non-SAFA members:</u></p> <p style="text-align: center;">R4000 for first day of CPD Activity. R1500 for every extra day of Activity.</p> <p style="text-align: center;">R6000 for first day of CPD Activity if fast tracked and R2000 for every extra day if fast tracked.</p>	<p style="text-align: center;">Charge for Attendees</p> <p>Provider completes ECSA ECPD2 form & SAFA addendum at least 3 months prior to the first Activity for normal fee. The Standard Validation Procedure must be complied with as set out in SAFA CPD04 guideline document. Providers must commit to all conditions and is binding on signing the Application Form ECPD2. No refund for activities not approved. Additional charge for repeat Validation. If application for validation of a CPA Activity received less than 3 months before first Activity date then the fast track rate shall apply. 3 hard copies & CD of Activity. Including samples of Registration Schedule, Attendee Feedback & Slide Presentations / Course Notes Choice of Reviewers is SAFA prerogative only and result of Validation is confidential. Applicant advised per confidential letter of result Reviewers must sign a confidentiality clause & will respect applications copyright and intellectual capital. Reports of Reviewers are confidential and not available to Providers/ Applicants. Applicants refused may reapply with enhanced or modified Activity. Validation is provisional until after first Activity attendees feedback reviewed. Thereafter valid for 3 years if feedback acceptable</p> <p>SAFA Website will provide a link only to the Activity Provider who has been validated</p>



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DOCUMENT SAFA CPD 06

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

INDEX

1. Background
2. Purpose
3. Scope
4. Requirements for endorsement
5. Cost for Validation
6. Categories of Activity
7. Criteria for review
8. Endorsement
9. Benefits
10. Submissions

ANNEXURE

VALIDATION CRITERIA CHECK LIST

Validation CPD guideline for Reviewers rev01 Oct 2005.doc

1. BACKGROUND

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 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 SAFA, as a Voluntary Association, to approved Providers. It also provides a guidance to SAFA Centres which will eventually award the 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 reviewing an application that has been received by SAFA.

There is a separate guideline for Applicants. See SAFA CPD04 document.

CPD activities can generally be categorised as follows:

- focused 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.
- focused 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 Professional Development Working Group of SAFA, under cover of a motivational letter, three hard copies of each of the following documents:

- ECSA Form ECPD 2 (Application for Approval of a CPD Activity)
- SAFA Appendix to Form ECPD 2
- presenter's resume (curriculum vitae)
- course notes
- course attendees evaluation sheets
- course completion certificates

- previous presentations covering when and where presented
- list of attendees at previous presentations and their comments
- cost of course attendance.

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. COST OF CPD ACTIVITY VALIDATION

See document SAFA CPD 04, Item 2, for a detailed cost structure.

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, (See section 4 above), the PDWG will appoint a minimum of two independent reviewers, one academic and one field expert, knowledgeable in the particular subject, to validate the CPD activity material. Their respective recommendations will be considered by the PDWG 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 e.g. 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

- g. Cost for Attending Activity**
 - equitable cost

In validating / approving a Category 1 CPD activity, SAFA 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.

8. VALIDATION

The two Reviewers will be required to review the material provided in accordance with the criteria given and prepare confidential comments and recommendations for the PDWG.

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 SAFA, 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 emphasise aspects.

When an Activity is validated, the provider will be given a “**stamp of validation**” which can be used on the course documentation and in advertising the course.

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 SAFA 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 SAFA are updated but will not extend the period of validation.

9. BENEFITS

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

A list of approved providers and programmes with associated detail will be recorded by SAFA and forwarded to ECSA and the Publisher of SAFA's journals. Furthermore a link will be made available on the SAFA Website to the Provider of the respective activity for more details.

10. SUBMISSIONS

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

**The Chairman
Professional Development Working Group
South African Flameproof Association
PO Box 868, Ferndale, Randburg, 2160**

Or

**4 Karen Street,
Bryanston West, Gauteng**

Phone: 011 061-5000

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Annexure A

GUIDELINE FOR THE VALIDATION OF CPD ACTIVITIES

VALIDATION CRITERIA CHECK LIST

ACTIVITY 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) ▪ outcome of course (competencies) 			
4. SCOPE <ul style="list-style-type: none"> ▪ technical nature ▪ relationship to electrical engineering 			
5. CONTENTS <ul style="list-style-type: none"> ▪ clearly defined scope ▪ technically correct ▪ appropriate standard ▪ level of theory matching intended audience ▪ quality of programme material, i.e. clarity of examples and diagrams ▪ comprehensive ▪ verifiable references ▪ relevant ▪ excessive promotion of products 			
6. ARRANGEMENTS <ul style="list-style-type: none"> ▪ relevant course documentation/notes ▪ appropriate presentation material ▪ clarity of notices 			
7. COSTS <ul style="list-style-type: none"> ▪ equitable costs 			

8. CONCLUSIONS (ACCEPTABLE / NOT ACCEPTABLE. WHY?)

9 Will the Activity enhances the knowledge/skill and competence/ability of the attendee?

10 COURSE, TUTORIAL OR WORKSHOP

- Provider's Name _____
- Title of course, tutorial or workshop _____
- Comments

11 RECOMMENDATIONS (Approved / NOT Approved)

SAFA 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 other appointed Reviewer for this Activity.

Furthermore, all the material and documentation supplied with this application shall be returned to SAFA and copyrights will be respected.

11. REVIEWER 1

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

REVIEWER 2

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

REVIEWER 3

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

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VALIDATION PROCESS COST STRUCTURE
DOCUMENT SAFA CPD 05

TYPE OF ACTIVITY EVENT	CHARGE FOR VALIDATION PROCESS	RULES
1 SPECIAL ACTIVITY Presidential Inaugural Address Presidents Invitation Lecture Monthly Meeting including talk etc Faraday Lecture IEE, IEEE Meetings & Lectures	R 0.00	<p style="text-align: center;">No Charge for Attendees</p> The lecture, talk, presentation and or technical debate must be part of the proceedings. Maximum CPD Credits per activity of this nature is 0.1 Credits. An electronic or hard copy of talk, presentation, agenda to be made of activity Office Bearers, Center Chairman with one other to review the talk etc and award CPD credit if warranted Standard Reviewer Report to be completed & forwarded to SAFA Jhb. Attendance Register to accompany Standard Reviewer Report where SAFA Director will allocate official CPD Number to the Activity. Honorarium permitted but not direct payment for activity
2 SAFA RUN CPD ACTIVITY Tutorials Workshops Technical Workshops General Conferences or Congresses Visiting Expert / Lecturer Seminars / Colloquiums Refresher Courses	Standard validation fee as in 3 below	<p style="text-align: center;">Charge for Attendees</p> Validation is valid for 36 months from date of first activity. Sponsors will be permitted for aspects of the activity. Committee arranging the activity to provide a budget scenario for approval and include complete sponsor information. Standard procedure for validation of activity will apply as detailed in 3 below. Events Committee and Treasurer as well as PDWG to be involved in the final approval Validation process can be done by SAFA Members or Appointed reviewers.

**VALIDATION PROCESS COST STRUCTURE
DOCUMENT SAFA CPD 05**

(continued)

TYPE OF ACTIVITY EVENT	CHARGE FOR VALIDATION PROCESS	RULES
<p>3 EXTERNAL CPD ACTIVITY PROVIDER</p> <p>Tutorials Workshops Technical Workshops General Conferences or Congresses Visiting Expert / Lecturer Seminars / Colloquiums Refresher Courses Product Promotions New Technology Application</p>	<p style="text-align: center;"><u>SAFA members:</u></p> <p style="text-align: center;">R4000 for first day of CPD Activity. R1500 for every extra day of Activity.</p> <p style="text-align: center;">R6000 for first day of CPD Activity if fast tracked and R2000 for every extra day if fast tracked.</p> <p style="text-align: center;"><u>Non-SAFA members:</u></p> <p style="text-align: center;">R4000 for first day of CPD Activity. R1500 for every extra day of Activity.</p> <p style="text-align: center;">R6000 for first day of CPD Activity if fast tracked and R2000 for every extra day if fast tracked.</p>	<p style="text-align: center;">Charge for Attendees</p> <p>Provider completes ECSA ECPD2 form & SAFA addendum at least 3 months prior to the first Activity for normal fee. The Standard Validation Procedure must be complied with as set out in SAFA CPD04 guideline document. Providers must commit to all conditions and is binding on signing the Application Form ECPD2. No refund for activities not approved. Additional charge for repeat Validation. If application for validation of a CPA Activity received less than 3 months before first Activity date then the fast track rate shall apply. 3 hard copies & CD of Activity. Including samples of Registration Schedule, Attendee Feedback & Slide Presentations / Course Notes Choice of Reviewers is SAFA prerogative only and result of Validation is confidential. Applicant advised per confidential letter of result Reviewers must sign a confidentiality clause & will respect applications copyright and intellectual capital. Reports of Reviewers are confidential and not available to Providers/ Applicants. Applicants refused may reapply with enhanced or modified Activity. Validation is provisional until after first Activity attendees feedback reviewed. Thereafter valid for 3 years if feedback acceptable</p> <p>SAFA Website will provide a link only to the Activity Provider who has been validated</p>



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DOCUMENT SAFA CPD 06

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

INDEX

1. Background
- 2 Purpose
- 11.Scope
- 12.Requirements for endorsement
- 13.Cost for Validation
- 14.Categories of Activity
- 15.Criteria for review
- 16.Endorsement
- 17.Benefits
- 18.Submissions

ANNEXURE

VALIDATION CRITERIA CHECK LIST

Validation CPD guideline for Reviewers rev01 Oct 2005.doc

1. BACKGROUND

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 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 SAFA, as a Voluntary Association, to approved Providers. It also provides a guidance to SAFA Centres which will eventually award the 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 reviewing an application that has been received by SAFA.

There is a separate guideline for Applicants. See SAFA CPD04 document.

CPD activities can generally be categorised as follows:

- focused 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.
- focused 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 Professional Development Working Group of SAFA, under cover of a motivational letter, three hard copies of each of the following documents:

- ECSA Form ECPD 2 (Application for Approval of a CPD Activity)
- SAFA Appendix to Form ECPD 2
- presenter's resume (curriculum vitae)
- course notes
- course attendees evaluation sheets
- course completion certificates

- previous presentations covering when and where presented
- list of attendees at previous presentations and their comments
- cost of course attendance.

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. COST OF CPD ACTIVITY VALIDATION

See document SAFA CPD 04, Item 2, for a detailed cost structure.

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, (See section 4 above), the PDWG will appoint a minimum of two independent reviewers, one academic and one field expert, knowledgeable in the particular subject, to validate the CPD activity material. Their respective recommendations will be considered by the PDWG 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 e.g. 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

- g. Cost for Attending Activity**
 - equitable cost

In validating / approving a Category 1 CPD activity, SAFA 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.

8. VALIDATION

The two Reviewers will be required to review the material provided in accordance with the criteria given and prepare confidential comments and recommendations for the PDWG.

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 SAFA, 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 emphasise aspects.

When an Activity is validated, the provider will be given a “**stamp of validation**” which can be used on the course documentation and in advertising the course.

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 SAFA 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 SAFA are updated but will not extend the period of validation.

9. BENEFITS

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

A list of approved providers and programmes with associated detail will be recorded by SAFA and forwarded to ECSA and the Publisher of SAFA's journals. Furthermore a link will be made available on the SAFA Website to the Provider of the respective activity for more details.

10. SUBMISSIONS

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

**The Chairman
Professional Development Working Group
South African Flameproof Association
PO Box 868, Ferndale, Randburg, 2160**

Or

**4 Karen Street,
Bryanston West, Gauteng**

Phone: 011 061-5000

Fax: 086 688-7005

Email: safaservices@vdw.co.za



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Annexure A

GUIDELINE FOR THE VALIDATION OF CPD ACTIVITIES

VALIDATION CRITERIA CHECK LIST

ACTIVITY No

CATEGORY	ACCEPTABLE		
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3. OBJECTIVE <ul style="list-style-type: none"> ▪ what the course claims to be ▪ for whom the course is intended (target audience) ▪ outcome of course (competencies) 			
4. SCOPE <ul style="list-style-type: none"> ▪ technical nature ▪ relationship to electrical engineering 			
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9 Will the Activity enhance the knowledge/skill and competence/ability of the attendee?

10 COURSE, TUTORIAL OR WORKSHOP

- Provider's Name _____
- Title of course, tutorial or workshop _____
- Comments

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SAFA 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 other appointed Reviewer for this Activity.

Furthermore, all the material and documentation supplied with this application shall be returned to SAFA and copyrights will be respected.

11. REVIEWER 1

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


REVIEWER 2

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

REVIEWER 3

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

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 ECSA <small>Form ECPD 1</small>	ENGINEERING COUNCIL OF SOUTH AFRICA CPD PORTFOLIO FOR THE ANNUAL CYCLE ENDING (mth & year) <small>Please complete and return to: The CPD Officer, ECSA, Private Bag x 691, BRUMA, 2028</small>
--	---

Surname		ECSA Registration No/s.
First Names		Main Registration Category (Multiple Registrations)

1. CATEGORY 1: DEVELOPMENTAL ACTIVITIES: 10 hours per credit (maximum 4 credits)

Name of Activity	Date	Activity & Hours Claimed	Provider <small>(If provider is not a recognized voluntary association or accredited tertiary educational institution, give also name of recognized voluntary association approving the activity)</small>	Credits Claimed
Attendance of structured educational / developmental meetings (conferences, seminars, workshops, lectures etc)				
TOTAL CREDITS FOR THIS ACTIVITY				

2. CATEGORY 2: WORK-BASED ACTIVITIES

Name of Activity	Date from	Date to	Hours Claimed	Employer	Credits Claimed
A) Engineering related work <small>(400 hours per credit - maximum 2 credits)</small>					
Name of Activity	Date from	Date to	Hours Claimed	Details of Candidates	Credits Claimed
B) Mentoring candidates in the work place (50 hours per credit – maximum 1 credit)					
TOTAL CREDITS FOR THIS ACTIVITY					

3. CATEGORY 3: INDIVIDUAL ACTIVITIES

Type of Activity	Name of Recognized Voluntary Association	Grade of Membership	Credit Claimed	
A) Membership of a Recognised Voluntary Association <small>(Maximum 1 credit)</small>				
Type of Activity	Date/s	Hours Claimed	Details of Activity	Credits Claimed
B) Individual Activities: <small>(10 hours per credit – maximum 3 credits)</small>				
TOTAL CREDITS FOR THESE ACTIVITIES				

TOTAL OF CREDITS OBTAINED FOR THE YEAR	
---	--

I, the undersigned, certify that the information contained in this document is correct.

SIGNATURE

-----oOo-----

DATE



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CPD ACTIVITY FEEDBACK FORM

SAFA CPD Manual Annexure b

Course:

Date(s):

1. What motivated you to attend the course?

2. Please rate the lecturing and other aspects of the course:

	Excellent	Good	Fair	Poor
Arrangements during the course				
Lecturer presentation style				
Pace of delivery				
Level				
Course notes				
Course content in relation to your interest				
Amount of theory presented				
Practicals & tutorials				
Venue & catering				

CPD ACTIVITY FEEDBACK FORM

(continued)

SAFA CPD Manual Annexure b

Course:

Date(s):

3. Were there any topics you felt should have been either omitted or included in the course?

YES	NO
-----	----

If YES, please give details:

4. Do you have any specific suggestions for improving this course?

5. Would you recommend this course to others?

YES	NO
-----	----