

Education and Training Endorsement Policy

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1. Purpose of the Policy

The Institute of Risk Management South Africa (IRMSA) is from time to time approached by training providers and tertiary educational bodies to endorse Education and Training (E&T) courses/interventions. In addition, IRMSA will from time to time offer training courses to its members which will be conducted by external training providers. In order to ensure that members' interests are safeguarded it is necessary to provide clear guidelines for a consistent and a transparent process for quality assurance of education and training material/interventions that are aligned with the Institute's endorsement policy.

2. Objective of the Policy

The objective of this policy is to provide a framework for the quality assurance of endorsed and in-house endorsed E&T material/interventions by IRMSA. "Endorsed" material / training can be categorised as:

- Training which is delivered on behalf of IRMSA, as well as on the organisation's behalf, to customers where an income is generated and which complies with all the requirements in this policy.
- A risk management qualification from a Higher Education institution which complies with all the requirements in this policy.

With reference to the above, the organisations providing training and higher education must be registered as an IRMSA member in good standing.

"In-house Endorsement" is limited to the delivery of the material / training in one's own organisation and the organisation must be registered as an IRMSA member. The material must be aligned to relevant unit standards and accreditation for the learning material must have been received from a relevant Sector Education Training Authority. The material must also comply with all the requirements in this policy.

3. Roles and Responsibilities

3.1 *Education and Technical Committee*

The *Education and Technical Committee* is responsible for:

- Preparing, issuing and evaluating tenders for IRMSA approved training courses;
- Reviewing all applications for the endorsement of training material/interventions in accordance with the endorsement criteria detailed below;
- Co-opting members with specialist knowledge where required to evaluate content of training material;
- Determining the conditions applicable to each agreement;
- Monitoring the adherence of training providers to the agreement;
- Taking corrective measures where training providers are in breach of the agreement;

- Annually reviewing agreements with training providers;
- Ensuring alignment of the value of the training material/intervention with the Members Accreditation Policy;
- Providing an updated schedule of all endorsed training material/interventions to the IRMSA Executive Committee when applicable;
- Providing detail of any endorsed training material/intervention to any Executive Committee member when reasonably requested to do so; and
- Ensuring proper record keeping of all agreements and endorsed training material.

3.2 *General Manager*

The General Manager of IRMSA is responsible for:

- Providing administrative support to the Education and Technical Committee.
- Ensuring that the Institute meets all its obligations contained in the agreements with training providers;
- Providing proper record keeping of all endorsed training material/interventions.

3.3 *Membership Committee*

The Membership Committee is responsible for:

- Providing the Education and Technical Committee with the updated Members Accreditation Policy at all times;
- Confirming the accreditation value of training material/interventions within a reasonable time when approached to do so.

3.4 *Executive Committee*

The Executive Committee is responsible for:

- Providing the necessary oversight in respect of the proper application of the endorsement criteria and process;
- Mandating the Education and Technical Committee in respect of the responsibilities related to this policy;
- Annually review this policy.
- The Executive Committee is responsible for final approval of agreements.

4 Policy Review

The policy is subject to annual review and approval by the IRMSA Executive Committee.

5 Ownership and Approval of Policy

Ownership of the policy is vested in the IRMSA Executive Committee. The policy is recommended by the Education and Technical Committee and approved by the IRMSA Executive Committee.

6 Endorsement criteria

All applications for endorsement must be in the interest of the IRMSA members and will be assessed according to the following criteria:

6.1 *Relevance to members of IRMSA*

- Skills and Competencies as determined by the Member Accreditation Policy
- Industry knowledge – this relates to the level of knowledge relevant to IRMSA members in a particular industry such as banking.

6.2 *Training Provider Profile*

- Accreditation with
 - A Sector Education Training Authority (SETA)
 - Other relevant bodies
 - Courses aligned to unit standards or qualifications where applicable
- Relevant experience of the training provider
- Qualification and experience of trainers
- Size and structure

6.3 *Quality of training material/intervention*

- Content – complexity, accuracy, fit to target audience, flexibility, customisation;
- Delivery medium;
- Assessment approach;
- Alignment with NQF principles; and
- Appropriate costing (value for money).

7 Endorsement Process

7.1 The applicant must submit the application in the prescribed format within the prescribed timeline; (An application form specifying the required information and the timelines is attached as Annexure A).

7.2 The Education and Technical Committee will assess the application at the scheduled monthly meeting in line with the criteria detailed above and determine the success as well as the conditions applicable to the endorsement. The conditions will include the

fee arrangement to be negotiated on an ad hoc basis taking cognisance of the responsibilities and input from IRMSA.

7.3 The Education and Technical Committee will determine the accreditation value in line with the Member Accreditation Policy and will request confirmation of the value from the Membership Committee.

7.4 The provider will be informed of the decision within a 90 day period after date of submission.

7.5 The Education and Technical Committee will prepare the agreement (if required) with the training provider to be signed by the Executive Committee. An agreement between IRMSA and the provider will be required when an IRMSA qualification or course is presented.

8 Standard Conditions for Endorsements and Agreements

The following standard conditions will be included in all agreements with training vendors:

8.1 This agreement shall commence on the agreed date and shall continue for an initial period of 12 (twelve) months thereafter. Following the Initial Period, this agreement shall automatically renew annually, unless terminated in accordance with section 10.1 of the agreement or unless either party provides 3 (three) months written notice to the other party of its intention not to renew the agreement. All renewals of endorsements and agreements will be subject to the formal endorsement process and endorsement criteria as detailed above;

8.2 Amendment to the content of the high level curriculum, delivery mechanism or standard of presenters must be approved by the Education and Technical Committee prior to being implemented;

8.3 The copyright of the material will vest in the training provider unless the material was developed on behalf of IRMSA or co-developed by IRMSA. If co-developed the copyright will vest in IRMSA as well as the training provider, if it was developed on behalf of IRMSA the copyright of the material will be agreed on a case by case basis.

8.4 Course evaluations must be conducted after each learning intervention and provided to IRMSA within two weeks of the learning intervention. IRMSA may recommend remedial action and require relevant proof if applicable.

8.5 Once endorsement has been granted and whilst it remains in force, the IRMSA logo may be used on the cover page of the training material and the following statement must be inserted on the first number of pages of the manual e.g. before or after the disclaimer, or before the table of contents, or on the introduction page:

“This course is endorsed by the Institute of Risk Management South Africa (IRMSA). For further information on IRMSA or to provide feedback on the course, contact the General Manager on +27 (0)11 234 5898 or Email: janet@irmsa.org.za.

8.6 Standard breach of contract clause.

8.7 All risks associated with any training course such as unpaid fees and cancellation of scheduled courses at short notice for whatever reason will be borne by the training provider and not IRMSA.

**APPLICATION FORM –
ENDORSEMENT OF TRAINING MATERIAL/INTERVENTIONS**

I/We _____

Apply herewith to the Institute of Risk Management South Africa (IRMSA) for the endorsement of the following

(Please describe the material or training intervention)

I attach hereto a proposal providing sufficient information to enable IRMSA to apply the following criteria:

1 Relevance to IRMSA members

- Skills and Competencies as determined by the Member Accreditation Policy
- Industry knowledge – this relates to the level of knowledge relevant to IRMSA members in a particular industry such as banking.

2 Training Provider Profile

- Accreditation with:
 - A Sector Education Training Authority (SETA)
 - Other relevant bodies
 - Courses aligned to unit standards or qualifications where applicable
- Relevant experience of training providers
- Qualification and experience of trainers
- Size and structure

3 Quality of training material/intervention

- Content – complexity, accuracy, fit to target audience, flexibility, customisation;
- Delivery medium;
- Assessment approach;
- Alignment with NQF principles; and
- Appropriate costing (value for money).

I acknowledge

- That the proposal will only be assessed at the next scheduled meeting of the Education and Technical Committee and the outcome will be communicated as soon as possible thereafter;
- I will be required to enter into a written agreement with IRMSA should the proposal be successful. Standard conditions applicable to the agreement will relate amongst others to:
 - The duration (no agreement exceeding 12 months will be entered into)
 - Assessment of the training material and/or delivery
 - Fee arrangement relative to the obligations of IRMSA
 - Amendments to the training material/course content and/or delivery.
 - Risks relating to , amongst other things, training courses being cancelled at short notice for whatever reason will be borne by the training provider

Signed at _____ on _____

Forward your endorsement of training material application to the:

General Manager
Institute of Risk Management SA
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Fax. 086 647 6191
Email: janet@irmsa.org.za