



## **Employer-managed further learning programmes – guidance for supervising engineers, assessors and verifiers**

### **Introduction**

This guidance is for supervising engineers, assessors and verifiers involved in employer-managed further learning programmes.

It gives an overview of further learning and the programmes and then sets out the roles and responsibilities of supervising engineers, assessors and verifiers.

Depending on which you're involved in, you should also read the guidance associated with the individual programme:

- FLJBM05 - Employer-managed further learning guidance

### **1. Further learning**

Further learning is for candidates who are aiming to become chartered (CEng) or incorporated (IEng) engineers but don't have the right academic qualifications and experience (known as the educational base).

Further learning bridges the gap between candidates' existing qualifications and the educational base for CEng or IEng level.

For example, candidates with the following qualifications will need to do further learning before moving to IEng or CEng level:

- BEng (Hons) degree – further learning needed to get to CEng level
- BSc (Hons) degree – further learning needed to get to CEng level
- HNC, HND or foundation degree – further learning needed to get to IEng level

Further learning could range from improving on-the-job knowledge – which includes employer programmes – to getting another formal qualification. It's measured by how much 'new' learning the candidate has done.

Once candidates have the educational base they need, they can move to the next stage of their professional qualification – initial professional development (IPD). In many cases, candidates will work towards their further learning and IPD at the same time.

### **2. Employer-managed further learning programmes**

Employer-managed programmes give candidates the opportunity get the educational base they need by improving knowledge at work.

Employer-managed programmes are run by a candidate's employer.

The main features of such Employer- managed programmes are:

- The employer's further learning programme has been approved by the JBM
- The employer's registered supervising engineer is responsible for managing the programme and supporting the candidate.
- The candidate prepares a learning plan which is approved, monitored, assessed and verified by the supervising engineer.
- The candidate submits written evidence throughout the programme, which is evaluated by an assessor.
- An internal verifier audits the process on behalf of the employer.
- The institutions audit the process through the JBM.

Supervising engineers will register, individually, with the institutions after they have taken part in an induction seminar. This seminar will be organised by the JBM on behalf of its member institutions.

### 3. Roles and responsibilities

Role	Employer-managed programme
Manages the programme	Supervising engineer
Gives the candidate guidance and support	Supervising engineer
Assesses the candidate's evidence	Assessor
Audits the further learning process internally	Internal verifier
Audits the further learning process externally	External verifier

The supervising engineer's main role is to manage the programme, and give advice guidance and support to the candidate. They oversee the candidate's progress through the programme, and manage the assessment process.

The internal verifier ensures that the further learning process has been properly administered and that candidates are assessed in the same way.

Although they are normally an employee, the internal verifier may be someone from outside the company as long as they agree to the principles in these guidelines. The internal verifier can't also be the supervising engineer or an assessor.

The company's programme will be audited by the JBM, normally every five years, by two verifiers. Their role is to ensure that the programme meets the required standards.

The assessor's main role is to assess and verify the candidate's portfolio of further learning evidence against the agreed learning plan. This includes assessing prior learning.

The supervising engineer will also help the candidate prepare their plan. The assessor will then examine the recorded evidence with the candidate.

It is useful for the assessor to have a knowledge or understanding of the various subject areas, to help them assess and verify the new learning properly.

In certain circumstances, it's necessary for further learning to be assessed by more than one person. This could be because a candidate has a range of experience or changed careers, or because of the contrasting nature of the six broad categories of the required learning outcomes.

Once the learning plan has been agreed, the candidate is primarily responsible for identifying learning opportunities and recording further learning against the agreed objectives. They must also clearly show where the learning outcomes have been achieved.

Where employers are managing the programme, they are responsible for supporting the candidate and assessor, and making sure the further learning is completed as efficiently and quickly as possible.

The institutions will provide support when it's needed. They will also audit the process after the assessor has verified the candidates' further learning. The purpose of the audit is not to check if the candidate's learning outcomes have been achieved or to question the assessor's decisions.

#### 4. Supervising engineer, verifier and assessor activities

The tables below show how supervising engineers, verifiers and assessors are involved at each stage of the process.

##### Candidate's existing educational base

Educational base	Supervising engineer activities
<p>Candidates with a JBM-approved qualification – e.g. BEng (Hons), BSc (Hons), HND/C, foundation degree – can do further learning to achieve the educational base for membership of a JBM institution, and Engineering Council registration at CEng or IEng level.</p> <p>If programmes have not been approved by the JBM, they may need to be individually assessed, or the candidate may need more academic study before doing further learning.</p>	<p>Review the evidence to confirm that the candidate has an accepted academic qualification.</p> <p>If they don't, advise the candidate to apply for an individual case assessment.</p>

Prior learning	Supervising engineer activities
<p>Candidates may have already completed areas of further learning before starting the programme. This is prior learning and might include industrial placements, part-time study and short courses.</p> <p>To show prior learning, candidates must provide their supervising engineer with a portfolio that shows:</p> <ul style="list-style-type: none"> <li>• What was done</li> <li>• Where it was done</li> <li>• The time involved</li> </ul> <p>Most importantly, they must show what they learned, and how it can be (or has been) measured, assessed or verified.</p> <p>Once the prior learning has been agreed by the supervising engineer, it will be recorded as further learning.</p>	<p>Assess and verify the relevant prior learning.</p> <p>With the Candidate, allocate the prior learning to one or more of the learning outcomes.</p>

**Candidate's learning plan**

<b>Learning plan – plan overview</b>	<b>Supervising engineer activities</b>
In the plan overview, the candidate will set out, in general terms, the agreed direction and focus for the further learning programme. In most cases this will be done alongside their IPD.	Assess and advise on the balance of new learning to meet the appropriate learning outcomes.
<b>Learning plan – the learning objectives</b>	<b>Supervising engineer activities</b>
<p>The candidate's learning objectives expand on the plan overview, by showing how the further learning will be achieved and what evidence will be provided.</p> <p><b>The objectives will cover a six-month period.</b></p> <p>The estimated number of hours will show how much of the learning will be taught hours (on courses or other academic programmes) and how much will be through other methods (including self-directed study, research, experiential learning).</p> <p>The objectives will be achieved through the employer-managed programme. The candidate will need support and assistance from line managers and others.</p>	<p>Work with the candidate to set appropriate learning objectives.</p> <p>Agree learning objectives.</p> <p>Liaise and negotiate, if necessary, with line managers and others in the company to confirm and agree the learning plan, objectives, resources and budgets for time and expenses.</p>

**Reviewing and verifying:**

<b>Periodic progress review</b>	<b>Assessor activities</b>
<p>The candidate will record further learning in a format that's been agreed with the assessor (this may be the company's standard format). These records may form part of the personal development record (PDR), but further learning and IPD will be recorded separately.</p> <p>The candidate is responsible for identifying the learning they achieve against each objective, and recording it so it can be assessed and verified.</p> <p>The evidence will be reviewed at least every six months. Unless the company has a more effective format, the candidate will use the further learning plan summary to record how each learning outcome has been achieved. This is likely to be a 'live' document showing how progress is being made.</p> <p>The candidate will keep the assessor up-to-date with their circumstances and let them know if their career changes direction, or if they change employer. They will make sure that the further learning record is complete so it can be signed-off by the assessor.</p>	<p>Agree with the candidate what information will be recorded, and what format will be used.</p> <p>Verify the learning by asking candidates to explain what they've recorded.</p> <p>Assess objectives periodically and record it on the form. Reassess the Learning Plan to make sure it remains relevant, and amend if appropriate.</p> <p>Give the candidate line managers, and advisers feedback.</p>

<b>Internal and external courses</b>	<b>Assessor activities</b>
<p>Company or external courses can be used as further learning and also added to continuing professional development (CPD) records for IPD. If the course was examined or formally assessed, this will be evidence that they have achieved the course's learning outcomes.</p> <p>If the course was not examined or assessed, the candidate should prepare a report which shows the new learning. This also helps the assessor assess and verify it against the appropriate learning outcomes.</p>	<p>Verify the learning by asking candidates to explain what they've recorded.</p>

<b>Completing further learning</b>	<b>Assessor activities</b>
<p>Before submitting the record to the assessor, the candidate will ensure that all learning outcomes have been achieved and that the records are complete.</p> <p>The final portfolio summary will show the further learning is complete.</p> <p>The candidate submits a copy of the portfolio summary, which has been signed by the supervising engineer, assessor and internal verifier (if appropriate). The institutions will then record that the candidate has the educational base they need to register with the Engineering Council at the appropriate level.</p>	<p>Verify that the six-month learning plan has been achieved.</p> <p>Once the full further learning is complete, sign off the portfolio summary.</p>

<b>Internal verification</b>	<b>Internal verifier activities</b>
<p>The assessor's assessment will be verified – internally and externally – to check that the appropriate standards and process have been applied.</p> <p>When they submit their further learning programme for approval, the employer will give details of their internal verification process and who is responsible for this audit.</p>	<p>Every year, verify that the processes that were followed during the first year of the programme are acceptable.</p> <p>Produce a report on this internal audit. This report will be used by the JBM when they visit the employer to monitor the programme.</p> <p>Once the full further learning has been achieved, sign off the candidate's portfolio summary.</p> <p>After the first candidates have completed the programme, review the process and suggest amendments, if they are needed. This report should be available to the JBM team when they audit the programme.</p>

<b>Completing further learning</b>	<b>Supervising engineer activities</b>
Employers will make their further learning programmes, learning plans and assessment records available, on request, to the external verification panel. The external verifiers will need to see candidates' evidence portfolios and to meet the candidates who are on or who have completed a programme.	Ensure that the employer maintains enough evidence to support the external verification process.
<b>External verification</b>	<b>External verifiers' activities</b>
<p>The JBM verifies further learning programmes and processes.</p> <p>A programme will normally be approved for five years. After that, there will be a monitoring visit to check on progress, normally after a year. Programmes are then audited every five years.</p>	<p>Visit the employer to check that appropriate processes are in place.</p> <p>Inspect candidates' evidence and assessors' records to make sure the correct standards are being applied.</p> <p>Produce a monitoring visit or audit report following the visit with support from a visit secretary.</p>