



# OPITO TECHNICAL BULLETIN 002 TEMPORARY TRAINING AND ASSESSMENT GUIDELINES

March 2020



## Background

This bulletin sets out to detail the policy and process behind delivering training and assessment (underpinning knowledge, theory and practical learning outcomes) for OPITO Standards, due to restrictions imposed by the current global COVID-19 pandemic.

The safety and wellbeing of our employees, delegates and Training Provider employees continues to be our priority. We recognise the unprecedented challenges that our industry faces in light of COVID-19.

We will continue to work with Training Providers to understand where we can support you and work with you to provide options and solutions throughout this difficult time.

## Current Situation

With the current situation changing on a daily basis, it is proving challenging and/or impossible for Training Providers to conduct training due to restrictions imposed by national governments which can restrict/ban travel.

We are committed to supporting Training Providers through this period. This has included finding innovative ways to support the continued delivery of OPITO Standards.

In order for OPITO training to be delivered remotely, we have developed the following separate guidance for the three scenarios detailed below:

1. Delivery of underpinning knowledge i.e. Training Staff to explain and demonstrate
2. Delivery of theory learning outcomes i.e. Delegates to explain
3. Delivery of practical learning outcomes i.e. Delegates to demonstrate

## 1. Remote Delivery of Underpinning Knowledge Content

The delivery of underpinning knowledge content contained in all OPITO Standards can be conducted remotely. The way in which this training is delivered is at the sole discretion of the Training Provider.

All remote training must ensure that the relevant sections of the training programme from the OPITO Standard are delivered in an engaging way, ensuring the focus is on quality delivery of content to the delegate.

To enable this to be achieved, we encourage the use of virtual teaching platforms such as Desire2Learn, Zoom, Canvas and Google Classroom (this list is not exhaustive) which can be used to simulate an in-person classroom.

Consideration should also be given to the following:

- Live instructor-led webinars
- Live instructor-led training sessions
- eLearning products
- Videos of practical training and associated learning outcomes
- Recorded class lectures

Training Providers must have a documented policy on the process followed for the remote delivery of underpinning knowledge. For more details and guidance on this policy please see Appendix 2.



## 2. Remote Assessment of Theory Learning Outcomes

The assessment of theory learning outcomes contained in all OPITO Standards can be conducted remotely. The way in which these assessments are conducted is at the sole discretion of the Training Provider.

It is important to make a clear distinction between learning outcomes that can be assessed theoretically (i.e. explain) and those that require a practical assessment (i.e. the delegate to practice or demonstrate).

Training Providers must have a documented policy on the process followed for the remote assessment of theory learning outcomes. For more details and guidance on this policy please see Appendix 2.

## 3. Remote Assessment of Practical Learning Outcomes

**Practical learning outcomes vary in complexity throughout the OPITO Standards and often require specialist equipment in order to be fully achieved. Therefore, assessing practical learning outcomes is not possible across all OPITO Standards.**

The 'Temporary Delivery of OPITO Standards Table' outlines the Standards that practical learning outcomes can be delivered against. (Appendix 1).

These practical learning outcomes can be delivered in a variety of ways incorporating the use of:

1. Video assessment (live and recorded)
2. Use of simulation technology and simulated working environments
3. Assessment of candidates at their workplace or other suitable location

Training Providers must have a documented policy on the process followed for the remote assessment of practical learning outcomes. For more details and guidance on this policy please see Appendix 2.

### 3.1 Approval to assess Practical Learning Outcomes remotely

Training Providers must gain prior approval from OPITO for the practical learning outcomes indicated in the Standards below to be assessed remotely.

A detailed assessment plan, including the assessment methods and assessment staff that will be used, must be submitted to the Regional Approvals Manager.

These assessment plans must be submitted and approved by OPITO prior to delivery.



## 3.2 Where Practical Learning Outcomes cannot be assessed remotely

Where it is not possible for practical learning outcomes to be assessed remotely, the following considerations could be made when delivering training/assessment in the training centre:

1. The underpinning knowledge and theory-learning outcomes could be delivered and assessed in line with Sections 1 and 2 within this bulletin
2. Consider reducing class sizes to reduce delegate interaction and ensure adequate social distancing is observed i.e. ensuring appropriate distance between desks in line with government/health authority guidance
3. Enhanced cleaning and disinfection procedures including the use of gloves, antiseptic wipes throughout all areas of the training centre
4. Reduced staff/delegate ratios for assessment:
  - a) When running training/assessment with reduced class sizes, it may be possible to reduce the number of staff required to safely conduct the training. **Requests to reduce the staff requirement due to reduced class sizes must be made to the Regional Approvals Manager, accompanied by a suitable and sufficient risk assessment**
  - b) There are certain OPITO Standards that require a minimum number of delegates to be in attendance. Due to the exceptional circumstances and challenges posed by COVID-19, this requirement for minimum number of delegates may be relaxed. **To request authorisation to proceed with less than the minimum number of delegates as per the OPITO Standard, please contact the Regional Approvals Manager.** It must be noted that the quality of the training must not be compromised by reducing the number of delegates on the training/assessment course

**Authorisation to proceed with reduced staff or reduced delegate numbers must be received from OPITO prior to conducting training/assessment.**

## 4. Supporting OPITO Training Providers

OPITO understands that these are very challenging times for both Industry and Training Providers. To support your short-term contingency planning the following steps will be taken:

### 4.1 Credit Terms Extension

In recognition of the exceptional circumstances, with effect from 1 April 2020 **OPITO is temporarily extending existing payment terms** by doubling them from 30 days to 60 days until further notice.

### 4.2 Digital BOSIET Approval

OPITO will also disregard the approval fee for Digital BOSIET Approval with immediate effect. Please note that a Training Provider needs to hold approval for the corresponding traditional BOSIET approval prior to applying for the relevant Digital BOSIET approval. Applications can be made by contacting the Regional Approvals Manager.



## 5. Summary

Our priority is the health and well-being of our employees, the workforce, our Training Provider partners and the wider communities that we serve.

The above temporary measures are designed to deliver these core principles while ensuring the integrity of the OPITO Standards during the unprecedented and exceptional circumstances we find ourselves facing.

The measures will be in place with immediate effect and until further notice.

### **OPITO Leadership Team**

26 March 2020



## Appendix 1: Temporary Delivery of OPITO Standards

Standard Title	1. Theory and Demonstration Content Delivered Remotely	2.Theory Learning Outcomes (LOs) Assessed Remotely	3. Practical Los Assessed Remotely
<b>Basic Emergency Response Standards</b>			
BOSIET(with CA-EBS)	Yes	Yes	No
HUET (with CA-EBS)	Yes	Yes	No
FOET (with CA-EBS)	Yes	Yes	No
BOSIET (with EBS)	Yes	Yes	No
HUET (with EBS)	Yes	Yes	No
FOET (with EBS)	Yes	Yes	No
Tropical BOSIET	Yes	Yes	No
Tropical HUET	Yes	Yes	No
Tropical FOET	Yes	Yes	No
CA-EBS Initial Deployment (Dry)	Yes	Yes	Yes (With prior approval from OPITO)
CA-EBS Initial Deployment (Wet)	Yes	Yes	No
Escape Chute	Yes	Yes	No
Travel Safely By Boat	Yes	Yes	No
Minimum Industry Safety Training (MIST)	Yes	Yes	Yes (With prior approval from OPITO)
International MIST	Yes	Yes	Yes (With prior approval from OPITO)



Safe Driving At Work	Yes	Yes	No
H2S	Yes	Yes	Yes (With prior approval from OPITO)
<b>Specialist Emergency Response Standards</b>			
MEMIR	Yes	Yes	No
Offshore CRO Emergency Response	Yes	Yes	Yes (With prior approval from OPITO)
Onshore CRO Emergency Response	Yes	Yes	Yes (With prior approval from OPITO)
OIM Controlling Emergencies	Yes	Yes	Yes (With prior approval from OPITO)
Plant Manager/Incident Commander ER	Yes	Yes	No
Helideck Operations Initial Training (HOIT)	Yes	Yes	No
HERTM and HERTM Further	Yes	Yes	No
HERTL and HERTL Further	Yes	Yes	No
HDA Workplace Competence	Yes	Yes	Yes (With prior approval from OPITO)
HLO Workplace Competence	Yes	Yes	Yes (With prior approval from OPITO)
HERTM Workplace Competence	Yes	Yes	Yes (With prior approval from OPITO)



HERTL Workplace Competence	Yes	Yes	Yes (With prior approval from OPITO)
OERTM Initial and OERTM Further	Yes	Yes	No
OERTL Initial and OERTL Further	Yes	Yes	No
Offshore Lifeboat Initial Training	Yes	Yes	No
Offshore Lifeboat Further Training	Yes	Yes	Yes (With prior approval from OPITO)
Offshore Radio Operator	Yes	Yes	No
ERRV Command & Control Training	Yes	Yes	No
ERRV Fast Rescue Boatman	Yes	Yes	No
ERRV Fast Rescue Coxswain	Yes	Yes	No
ERRV Daughter Craft Coxswain	Yes	Yes	No
ERRV Initial Training for Shipboard Operations	Yes	Yes	No
ERRV Advanced Medical Aid Initial & Further	Yes	Yes	No
ERRV OODTP Training & Assessment	Yes	Yes	No



Standards for Technical Roles			
Banksman/Slinger Initial Training	Yes	Yes	No
Banksman/Slinger Assessment & Re-assessment	Yes	Yes	Yes (With prior approval from OPITO)
Rigger Initial Training	Yes	Yes	No
Rigger Assessment & Re-assessment	Yes	Yes	Yes (With prior approval from OPITO)
Drilling Rigger Assessment & Re-assessment	Yes	Yes	Yes (With prior approval from OPITO)
LOLER Competent Person Assessment & Re-assessment	Yes	Yes	Yes (With prior approval from OPITO)
Offshore Crane Operator Initial Training	Yes	Yes	No
Offshore Crane Operator Initial Assessment	Yes	Yes	No
Offshore Crane Operator Re-Assessment	Yes	Yes	Yes (With prior approval from OPITO)
Authorised Gas Tester (AGT)	Yes	Yes	N/A
Gas Monitor	Yes	Yes	N/A
Control of Work for Performing Authorities	Yes	Yes	N/A
Offshore Safety Representative Training	Yes	Yes	Yes (With prior approval from OPITO)



Elected Safety Representative Development Training	Yes	Yes	N/A
Insulation Systems Initial Training	Yes	Yes	No
Insulation Systems Assessment & Reassessment	Yes	Yes	Yes (With prior approval from OPITO)
Blaster-Sprayer Initial Training	Yes	Yes	No
Blaster-Sprayer Assessment & Re-assessment	Yes	Yes	Yes (With prior approval from OPITO)
Fireproofing Initial Training	Yes	Yes	No
Fireproofing Assessment & Re-assessment	Yes	Yes	Yes (With prior approval from OPITO)
Preparation of Dangerous Goods By Sea Initial & Further	Yes	Yes	N/A
Competence Assessor Training	Yes	Yes	Yes (With prior approval from OPITO)
Internal Verifier Training	Yes	Yes	Yes (With prior approval from OPITO)



## Appendix 2: Guidance on Remote Training Policies and Records

The current OPITO process for Remote Location Training, including the completion of the Remote Location Training proforma, will be suspended until further notice.

To replace this process, Training Providers must have a policy that documents how the training and/or assessment is delivered in a safe and engaging manner, ensuring the focus is on quality delivery that includes all required aspects of the OPITO Standard.

This policy and records detailing the method in which remote training/assessment was delivered must be retained for review during future monitoring audits.

To maintain the integrity of the training and, at the same time, to assist you as Training Providers in the creation of the temporary policy for remote training and assessment, we have created guidance below.

### Policy Guidance

Content	Overview
<p>1. A record of the OPITO Standards that are being delivered remotely must be maintained.</p>	<p>This should make it clear which OPITO Standards are being delivered remotely.</p> <p>The policy should detail the way in which records of this training are maintained. Records should include number of delegates trained/assessed and against which OPITO Standard, location of training/assessment and dates it was conducted.</p>
<p>2. Administration arrangements for the delivery of the training/assessment including:</p> <p>a) Information on the way in which it will be delivered, ensuring any minimum computer specification or any software required is clearly communicated prior to delivery</p> <p>b) Documented evidence showing that the delegate was aware of, and met these requirements, must be retained</p> <p>Training Providers must confirm delegate authenticity prior to the start of assessment. Suitable supporting records must be retained for audit purposes</p>	<p>Delivery of training/assessment remotely may require certain software or minimum computer specification.</p> <p>The policy should detail any such requirements and how they are communicated to delegates. A record that delegates met these minimum requirements must be retained i.e. a checkbox on the delegate registration form.</p> <p>Prior to assessment, Training Providers must ensure the identity of the delegate. For example, if using video calling, this could be done by ensuring government-issued photographic ID is produced.</p> <p>It is the sole responsibility of the Training Provider to ensure training/assessment is carried out safely.</p>



- c) Training Providers must ensure all training/assessment is conducted safely. Suitable and sufficient risk assessments must be available

Where appropriate, the policy should outline the requirement to conduct these risk assessments and ensure their suitability prior to delivery of training/assessment.

**All risk assessments must be retained for audit purposes.**

**Delivery of Assessment Only**

- 3. Documented evidence must be retained showing the delegate received:
  - a) Explanation prior to assessment on the learning outcomes to be assessed along with the expected assessment method
  - b) The delegate was briefed on the Training Provider’s Appeal Process prior to commencement of training
  - c) Assessment records detailing the outcome of the assessment including competent/not yet competent. These must include the name, signature and date of the delegate participation

**Delivery of Assessment Only**

The policy must outline the assessment procedure that will be followed.

This may require different approaches for different standards. This procedure can be high level and does not need to be in the form of a lesson/practical exercise plan.

It needs to demonstrate how delegates are made aware of the learning outcomes that will be assessed and the assessment methods used.

The policy needs to detail the process that will be followed to inform the candidate of the assessment outcome. It will also need to outline the steps followed if the delegate is deemed ‘Not Yet Competent’.

The policy needs to detail that delegates will be aware of the Appeals Process.

- 4. Delegate feedback forms must be completed post-training/assessment and retained for audit purposes
- 5. Any unsatisfactory comments must be recorded, tracked and, where appropriate, suitable mitigating actions should be implemented

The policy should ensure that each delegate is issued with a feedback form. These must be retained for audit purposes.

The policy should also detail the process followed if unsatisfactory feedback is received. For example, the software used may have been problematic for the delegate, the quality of recorded lecture/theory sessions may need to be improved etc. The focus of this section of the policy is to be able to track how any unsatisfactory feedback was mitigated.



<p>6. Work instructions for training/assessment staff: please note this must detail how the training session should be conducted and include details of the relevant sections of the OPITO Training Programme</p>	<p>It is recognised that delivery of training and/or assessment remotely may not be the normal method utilised by Training Providers.</p> <p>Brief and clear work instructions should be available to ensure that training and/or assessment is consistently delivered across the organisation. This may include how training/assessment is delivered, how training staff are involved in the administration and delivery of this training/assessment.</p> <p>The work instructions should also outline that suitable and sufficient risk assessments have been conducted and are in place, where required.</p>
<p>7. Regular review of the way in which remote training is delivered. This should use a combination of internal audit, review of delegate feedback and regular standardisation meetings between trainers</p>	<p>Delivery of remote training/assessment has to be of the highest quality and must ensure that all aspects of the OPITO standard are achieved.</p> <p>The policy should outline the process that is followed to ensure that regularly staff meetings are held to confirm the quality and consistency of training and/or assessment.</p>

**It must be noted that these arrangements are in place due to the exceptional circumstances posed by the COVID-19 situation. Training/assessment may be delivered in this way with immediate effect and until further notice once approval has been granted.**