

SHEA

Remote Training Delivery and Assessment Guide

SHEA - COVID-19 response (dated 30 March 2020)

A valid EUSR SHEA registration remains a requirement for many employers in our sector and Energy & Utility Skills recognise that a pragmatic approach is needed to support the continued delivery of SHEA training and assessment given the closure of many training centres and the need for social distancing.

We will continue to review our approach through discussion with employers and our Approved Trainers.

1. About the e-Classroom

Remote classrooms are not the same as e-Learning. E-Learning is when an individual learns on their own using learning and assessments delivered via an e-Learning platform. Typically, it is individual-led, and they determine when they carry out the learning.

Remote classrooms, or e-Classrooms, are delivered in real time by a Trainer – at a set time, using a variety of training materials and usually to a group of individuals – much the same as traditional face to face training.

The big difference, of course, is that the Trainer and individuals are in different locations. The ‘classroom’ environment is recreated using software - with video cameras, audio and screensharing – which allows interaction between the Trainer and the individual(s).

For the Trainer, the principles of remote training delivery for SHEA via an e-Classroom are the same as those for a physical classroom:

- The Trainer and individuals can talk and interact with each other in real time
- The design, content and structure of the SHEA training – and the final assessment – is the same
- The same training materials are used (e.g. the same SHEA PowerPoint slides used in a physical classroom)
- Individuals must pass a final assessment – albeit controlled, delivered and taken remotely
- Individuals are there to learn and pass the assessment to get their SHEA EUSR registration
- You are the subject matter expert
- ‘Classroom’ etiquette applies

2. About the assessment

There are online versions of the assessments (e-Assessments) available in our Computer Based Learning (CBL) system. Individuals can take the e-Assessment at the end of the remote training delivery and once completed; you will be able to see the results immediately.

Access to the e-Assessment is sent to the individual via an automated email which the Trainer generates. The email sent to the individual is called an ‘activation’ email and it provides a link for the individual to click on to take them to the e-Assessment.

The SHEA e-Assessment Administration Guide will give you more information on this part of the process – see Section 5 in the Guide.

3. About Technical Requirements

You need to consider the following before remote training delivery in an e-Classroom:

- You need a video camera and screen-sharing system appropriate for the delivery materials and the number of individuals being trained
- You need a computer with good quality camera and audio – we recommend using a headset with microphone as this improves the audio quality for everyone
- The internet connection must be reliable and available for the duration of the training delivery and assessment
- You will not be able to use paper-based documents and forms, such as a registration form, attendance register – if you want individuals to complete any forms, then ensure you use an ‘editable’ format
- You must know how to create activations for the e-Assessments through our CBL system
- You need to be confident when using the software and technology – build in time to practise screen sharing, sending activation emails, sending and receiving forms

4. About Energy & Utility Skills’ Requirements

You need to make sure that you can meet our Quality requirements:

- You must already be a Trainer approved to deliver SHEA
- You are familiar with our online registration system, QuartzWeb – because you will be adding individuals (who do not already have an EUSR registration) and their photos to a pre-registration CBL batch that will be created for you (see Section 5 of the SHEA e-Assessment Administration Guide)
- Training delivery must meet all the requirements laid out in our Trainer Terms and Conditions
- You must retain the same information as you would for training delivery in a physical classroom – they may be in a digital format rather than hard copies. There are editable templates in QuartzWeb you can use
- You must still issue an Energy & Utility Skills privacy notice to individuals
- You must use the approved SHEA learning materials
- You issue clear joining instructions to set expectations for the individual(s) – to include, for example, the time of the training, location, format of delivery and assessment, invigilation arrangements, need for clear desks, mobile phones switched off, they may be recorded

- Provide evidence on how you are mitigating the risk of malpractice (e.g. identity fraud, cheating or collusion) – recording the individual and room, using a webcam, camera feeds, screen sharing, additional physical presence in the room
- You still comply with all our Quality policies and processes (for example, our Quality Framework, Trainer Terms and Conditions, Policies for Reasonable Adjustments and Special Considerations, Appeals and Enquiries About Results, Complaints, Malpractice and Maladministration, Conflicts of Interest, Complaints)

5. About the Individual(s)

You will need to make sure the individual(s) understand the following before the training delivery begins:

- Traditional classroom etiquette applies – they need to be prepared at the start of the training and they are expected to remain present for the duration of the training and assessment
- Their environment must be appropriate - quiet, they will not be disturbed. If more than one individual, they should be seated at least 2m apart
- They will need a laptop or larger screen tablet device with audio and video camera functionality, both of which must remain switched on for the duration of the training and assessment. The use of mobile phones is not allowed
- An internet connection is required that will be available for the duration of delivery and assessment
- They need an email address of their own to receive registration information, exchange mandatory documents with you and receive the links to the classroom session and e-Assessment
- They are confident about installing the video camera software (some systems will not require this and will use a web browser interface instead)

6. About the Delivery System or Software

There are a wide variety of systems to consider. It is important you decide on one that is appropriate for you and that it enables you to maintain the required standards of delivery as well as the functionality to properly support the individuals during the session.

Energy & Utility Skills do not recommend any specific systems or software but please consider the following when evaluating your options:

- Be clear on any usage limits – some systems place limits on individual video camera calls, for example fixed length or set minutes per month, a limit on the number of individuals in any one call, limits on quality of audio and video feeds

- Depending on the software you decide to use, there may be a licence fee to access increased functionality or remove any usage caps
- There must be the functionality in the software you use to record the individuals when they are taking the assessment
- Reliability of the platform – you must ensure the video camera (the e-Classroom), will be available continuously for the several hours you will be delivering training
- The functionality must support effective delivery – ensure the software has the right tools so that individuals are supported properly during the session (for example screen sharing so they can see your learning materials, mute functions you control).
- Requirements for the individual being trained to install software. Whilst you will install the software to manage and deliver training, individuals may be more comfortable if they could access the e-Classroom through a web browser interface – rather than having to install software that they are unfamiliar with
- There are different versions of many products:
 - Skype for Business has more screen sharing functions than the personal version of Skype
 - Google Hangout also has a dedicated education version with better ‘workspace’ management tools than normal Hangout
 - Microsoft Teams also has an education version with specific assignment and grading functions for each participant
 - Zoom is a cloud-based video conferencing, group messaging, and online meetings system and allows multiple individuals to share their screens and interact
- Make sure these tools support the training delivery standards required, as well as making sure you do not invest in functionality you will not need
- Make sure it supports you – software choice can be quite personal. You need to be confident and comfortable when delivering.

7. About Getting Approved

Once you have decided you want to deliver training and/or assessment via an e-Classroom, the first step to approval is signing a ‘SHEA Remote Training Delivery and/or Assessment Temporary Approval Declaration’.

If you are going to deliver the assessment remotely using e-Assessment, there are some additional steps:

- Our Quality team will create an additional centre for you in QuartzWeb for SHEA e-Assessments (to differentiate the two centres, the e-Assessment centre will have (CBL) in the centre name)
- You need to complete and sign a ‘CBL Administrator Registration Form’

- Our Quality team will assign you the role of 'CBL Administrator' in QuartzWeb against the new centre
- Note: Our SHEA e-Assessment Administration Guide details how the e-Assessment is created and delivered to the individual and how results can be viewed

8. About the Assessment

Following remote training delivery, there are two ways of setting the assessment:

- Using e-Assessment via our CBL system
- Using paper answer sheets

Note: All individuals in the same e-Classroom must take the assessment in the same way, all e-Assessment or all paper-based.

If you are delivering an e-Assessment our 'SHEA e-Assessment Administration Guide' sets out the process.

If you are using a paper answer sheet, you will need to read out the questions to the individual(s) and they will record their answer on an answer sheet. You can either:

- Email them an editable answer sheet (available in QuartzWeb), they record their answers on screen as you read out the questions and then email back to you once complete
- Email them an answer sheet which they print out and use a pen to record their answers. They then scan and email the answer sheet back to you
- Email them an answer sheet which they print out and use a pen to record their answers. They then read back their answers to you once completed and you record their answers

Assessment begins for all individuals at the same time.

Invigilation is in place:

- Each individual is asked to confirm and demonstrate they do not have others in the room to assist with the assessment and
- You monitor the individual(s) by camera and/or
- You get another person in the room with the individual(s)

Individuals who fail the assessment, whether using e-Assessment or paper answer sheets, are given another opportunity to re-sit the test as per the SHEA scheme rules

Processing the Result

The CBL system automatically records the e-Assessment result and updates EUSR if successfully completed.

NOTE: When using e-Assessment, EUSR Cards have to be sent to one address, they cannot be sent out to different addresses – this applies to ALL your e-Assessment batches regardless of whether for different customers

If using paper answer sheets for the assessment, you will need to create a batch in QuartzWeb and record the result. The EUSR Support team will process the batch, producing the registration and EUSR card in the usual way.

9. About our Quality Requirements

Our Quality requirements are the same as for physical classroom delivery but what you will need to retain yourself differs depending on whether you use the e-Assessment or paper answer sheet route for assessment.

e-Assessment

e-Assessment outcomes are stored automatically within our CBL system, so you do not need to keep any information relating to results. It is good practice to retain:

- Privacy Notice
- Joining Instructions
- Evaluation Form
- Attendance Register

Paper answer sheet assessment

You must retain all completed answer sheets and it is good practice to also retain:

- Privacy Notice (optional)
- Joining Instructions (optional)
- Evaluation Form (optional)
- Attendance Register (optional)

You are not expected to print and store paper versions of any of the above for audit purposes - digital copies are acceptable.

Exemplar forms are available in QuartzWeb – you can use these or create your own.

10. Remote Training Delivery Best Practice

It is different delivering training remotely, but the learning experience can be just as interesting, valuable and rewarding as that in a physical classroom.

- Preparation is key – having spent enough time with your software so you are confident, having learning materials ready and all administrative tasks done prior to the session starting will let you focus on delivery on the day
- If you ‘invite’ the individuals to the training electronically, add a reminder for 10 minutes before the start time
- Double check before the training starts that you have all the registration details and mandatory information you need; if anything is missing you should address it right at the beginning before training starts
- ‘Open’ the e-Classroom at least 15 minutes before the start time – this gives you time to check everything is working, address any issues and gives you chance to prepare yourself. Much in the same way you would in a physical classroom.
- Check everyone’s learning environments when they join – ask each participant about their own work area, ask them to show it to you, make sure they will be able to participate properly without distraction, look at the lighting and if you can see them properly (remember invigilation later).
- Check the individuals are happy – that you are well enough lit, they can hear you properly, your video is working too
- Do not be afraid to ask someone to address any concerns you have
- Remember it is still a classroom – normal etiquette applies, everyone must behave appropriately, and it is okay to remind individuals of this at the start
- Explain how the classroom will work – any key features of the software relevant to them, interacting with one another, how you want them to get your attention (especially during the assessment), make them aware they will be recorded at some point
- Run through the session plan like you normally would – checklist of mandatory information and anything that is missing from anyone, the schedule, learning objectives, content and how it will be delivered, breaks, the final assessment and the invigilation rules
- Set expectations about maximum time allowed away from the screen
- Check understanding during delivery – both more regularly and more explicitly. Remember, you cannot rely as much on the visual cues like in a face to face classroom.
- Be conscious of how quick you are talking – you will probably need to try to speak a little more slowly, especially at the start of the session, as everyone settles into the e-Classroom

- Interaction is critical to everyone feeling involved – ask people to introduce themselves, ask questions regularly, try not to have periods of ‘silence’ for example when you are opening files and documents for learning - let the individuals know what you are doing
- Be enthusiastic – it’s contagious
- Stick to the schedule and remember the breaks, especially prior to the assessment
- Test conditions apply – remind individuals how they can get your attention during the assessment; remember to double check each individual’s environment before the assessment starts; get everyone to the beginning of the e-Assessment at the same time to make it manageable for you
- Remember the need for ongoing invigilation during the assessments, recording the session to support monitoring or audits
- It can feel like hard work to start with, but you are still the subject matter expert

If you have any queries at all relating to your role as a CBL Administrator, or activating individuals for e-Assessment, please call the EUSR Support team on 0121 745 1310 (select option 1) or email eusr@euskills.co.uk