Grid Skills: Notes for technical experts
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Grid Skills is introducing on-job assessment, which requires technical experts to verify practical observation in the field. On-job assessment is widely recognised in the vocational education sector and aligns with training and assessment models across industries.

On-job assessment offers learners many advantages including that:

- learners are observed in familiar environments and on operational equipment, and
- evidence is naturally occurring, authentic and meets company specifications and requirements.

These notes will help technical experts understand how their role fits into the training and assessment model delivered by Grid Skills. They also show how training in the transmission sector connects to the qualification and programme structure managed by the New Zealand Qualifications Authority.
What is a technical expert?

What do technical experts do?
Technical experts act as verifiers – they verify evidence that counts toward assessment results. On behalf of their company, they carry out practical observations, under assessment conditions, to verify aspects of a learner’s performance on the job. They must directly observe the learner performing the task and make decisions that are valid, fair and applied without discrimination.

A technical expert’s decision to sign-off a learner directly affects how well the learner, the company and the transmission sector can maintain, industry standards.

Who can be a technical expert?
A technical expert is a person competent in their trade discipline who:

- has current and proven technical knowledge, skills and experience in the subject they are verifying
- is recognised and trusted by their employer and others as being a competent worker
- is approved by the employer to act as a technical expert.

Technical experts are not required to hold unit standard 4098 Use standards to assess candidate performance. However, being trained in assessor skills could be a personal advantage to an individual as well as bringing benefits to the company. Subsidy for assessor training may be available through Grid Skills.

What do I have to do to be approved as a technical expert?
You must apply to be a technical expert by completing a technical expert form, available from the Grid Skills website under ‘On-job assessment’. Your employer must also sign the form as this verifies you are approved by them to verify learner performance on behalf of the company.
Resources that support the technical expert

Aside from these notes, Grid Skills supports the technical expert in a range of ways.

<table>
<thead>
<tr>
<th>Assessment documents</th>
<th>Standardised assessment documents include instructions to the technical expert.</th>
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<tr>
<td>Mobile app</td>
<td>A simple ‘just in time’ aid to support observations for on-job assessment. It brings up a flowchart that shows the stages of the on-job assessment process and the roles of the learner, technical expert and employer at each stage; it provides a process checklist for good technical expert practice; gives a contact number for phone support; and can be used to track how a learner is progressing through their practical observations.</td>
</tr>
<tr>
<td>Resources on the Grid Skills website</td>
<td>Scan this QR code to go to the Grid Skills’ webpage and scroll down to ‘On-job assessment’.</td>
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The code links to a range of resources, including:
- Technical Expert Validation form
- Notes for technical experts
- Technical expert mobile app

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<thead>
<tr>
<th>Phone and face to face support</th>
<th>We can provide introductory workshops to groups of technical experts or talk you through the process by phone, teleconferencing or skype.</th>
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<tbody>
<tr>
<td></td>
<td>Contact us for phone support on: +64 6 357 0919</td>
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Process checklist and flowchart

The checklist and flowchart below are incorporated into all on-job assessment material and the mobile app.

Checklist

1. Prepare to observe
   • Make sure your employer has approved you to sign-off observations.
   • Fill out the Technical Expert Validation form.
   • Be prepared: read the assessment and assessment conditions so you know what you are verifying.
   • If you don’t understand the assessment and conditions, call Grid Skills.

2. Observe
   • Do not lead the learner.
   • Be fair and consistent in your decisions.
   • For each task shown in the practical observation, tick the checkboxes when complete, date and initial, and provide comment.
   • Sign off the Observer verification only when the learner performs to industry standard.

3. Check
   • Check that workplace documentation is completed to company requirements and is relevant to the assessment.
   • Support the learner to complete the remainder of the assessment and to return it to Grid Skills as instructed – scan to MySkills.
On-job assessment flowchart

Learner receives On-Job Assessment (OJA)

Employer arranges exposure to tasks

Learner gains experience

Learner is observed and gathers supporting evidence

Technical expert signs off learner when the learner performs to industry standard

Documents are scanned to MySkills

Course outcomes achieved?

The Employer
• Makes sure learner gains enough of the right exposures
• Helps learner gather the right documents
• Has an approved Technical Expert ready to observe the learner

A Technical Expert
• Directly observes learner doing the work
• Is careful not to lead the learner

Note
• If a learner does not have direct access to MySkills, the employer arranges to have the documents scanned
• The employer holds original documents for 12 months

Grid Skills Assessor
• Checks the documents
• Follows up the technical expert
• Makes the final assessment decision

No
Grid Skills discusses options with learner and their employer

Yes
Grid Skills awards a course certificate and registers any credits with NZQA
Good practice guidelines for technical experts

**Know what you are doing**

You are verifying performance on behalf of the company and your decisions can contribute to your company’s good performance and the rise or fall of industry standards. Always check with Grid Skills if you do not understand what you are required to do.

**Involve the learner**

Involve the learner in planning the observation and collecting documented evidence.

**Maintain the standard**

Make sure evidence submitted is current, repeatable, authentic, valid, equitable, and sufficient.

- **Current?** Is the workplace documentation that supports the assessment current – does it match the tasks you observed? Are the observations being carried out within the timeframe required by the assessment?

- **Repeatable?** Are you confident the performance you observed is usual practise and could be repeated consistently?

- **Authentic?** Is the performance a true reflection of the learner’s skills and knowledge (e.g.: you did not ‘lead’ them)? Is the supporting documentation attributable to the learner?

- **Valid?** Did you directly observe the learner? Is what they were doing, or have provided, relevant to the task?

- **Equitable?** Have you been fair to the learner, without discrimination? Did they have a fair opportunity to demonstrate their skills and knowledge, to the level required? Would you make the same judgement for another learner given similar circumstances?

- **Sufficient?** Is the learner’s performance good enough – is it to industry standard? Have they provided the supporting documentation required?

**Record your comments**

Use the comment boxes in the assessment material to support your observation decision. Give detail about the environment and other aspects of the job to help you and the learner recall the observation in later discussion. Comments also give the Grid Skills’ assessor and external moderators an understanding of the context of the observation. The entries and comments you make on the assessment documents should be legible and clear in meaning.
Sign off the observation when it's been earned

You must be confident the learner has provided sufficient evidence that the standard has been met. Signing off a learner based on consideration of only some of the evidence requirements will lead to assessment that is not at the national standard. If you do not believe the learner has met the standard, discuss any further training required or opportunities for you to observe them. You can contact Grid Skills to talk things through, at any time.

Observer Verification

I/we verify that:
- the learner has performed all outcomes to industry standard
- I am/we are approved by my/our employer to conduct this observation

Barbara Boone

B.Boone signature and 26/9/2017

Fig. 1: Sample Observer Verification Form

Rule of thumb when signing off a learner

“If in doubt – there’s no doubt”
Where can I go for help?

Call 06 357 0919 and ask for Grid Skills. We will connect you with the right person.

What is ‘being consistent’?

Closely linked to fairness, being consistent means applying the observation criteria in a consistent manner across all learners. Ask yourself – given similar circumstances for any other learner, would I make the same decision?

What is fairness?

Fairness is making sure all learners have a fair and equal opportunity to demonstrate they can carry out the required tasks to standard. This requires you to: (1) make sure learners are prepared and understand what they are required to do and how and when they will be observed; (2) not discriminate against them (e.g. on the base of gender, race, personal friendships or preferences); and (3) not lead them to the answer.

What does it mean to ‘lead’ the learner’?

Leading the learner means using questions or comments that steer the learner toward taking an action or giving an answer they would not have come to themselves, without your intervention (e.g. do you think you’re doing that right?). It is important you do not ‘lead’ the learner to a successful performance. If you find yourself having to ‘lead’ a learner, they are not ready to be signed off – stop the observation and have them gain more experience.

Tip: Wear the right hat! If you are used to coaching learners through a job, you may tend to lead them during observations for sign off. Be aware of this and remember to swap your coaching hat for your technical expert hat. Even trained assessors can be caught out with this one.
What can I do if the assessment document does not seem relevant?

Industry input to the revision and design of assessment material is very important. Please contact Grid Skills.

Who makes the final assessment decision?

Grid Skills, as the training provider, retains responsibility for making the assessment decision.

When the on-job assessment documents are uploaded to MySkills a message is automatically sent to the assessor, generally a Grid Skills’ trainer. The assessor reviews the documentation and will call the technical expert to discuss their verification decisions and comments. The assessor then makes the assessment decision for the on-job assessment. Grid Skills awards a course certificate when all assessment activity for the course shows as being achieved. Grid Skills then registers unit standard credits, where these apply.

Is a person competent once they’ve attended Grid Skills training?

No – completing Grid Skills’ training makes a person work ready, not competent. Employers, as required under legislation, must apply their own evaluative processes to determine whether a person is competent to carry out work per industry rules and guidelines and the company’s own standards, policies and procedures. General expressions that training providers, assessors and employers can use to refer to a person’s training performance, without misusing the word ‘competent’ include that a person is’ performing/not performing to standard’ or that they ‘have met/not met assessment outcomes’. When Grid Skills refers to an assessment result, we use the terms ‘achieved’ or ‘not achieved’.
How Grid Skills links to New Zealand qualifications

Qualifications, programmes of study and unit standards

Most Grid Skills’ trade training programmes link to New Zealand qualifications, which are developed by standard setting bodies (SSBs) in consultation with our industry. The SSB or training provider develops a programme of study against that qualification – the programme describes how the qualification will be met. Programmes of study written toward qualifications in the electricity supply industry use unit standards as a tool to achieve and measure performance. Qualifications, programmes of study and unit standards must be approved by the New Zealand Qualifications Authority (NZQA) and are registered on the New Zealand Qualifications Framework NZQF. Refer to the diagram on the next page for further explanation of the structure of qualifications.

Key organisations involved in training toward New Zealand qualifications

NZQA

NZQA is a SSB. Its functions are to develop, register and support New Zealand qualifications. This includes:

• developing qualifications, processing results and maintaining learner Records of Achievement (ROA)
• ensuring the quality assurance of SSBs and tertiary education providers
• ensuring international recognition of New Zealand qualifications and equivalence with overseas qualifications, and assessing overseas educational and vocational qualifications for immigration and employment purposes.

Industry Training Organisations

Industry Training Organisations (ITOs) are SSBs established by industries. They are responsible for:

• setting national skill standards and managing qualification development for their industry (Connexis is the ITO for the electricity supply industry)
• providing information and advice about qualifications and training to trainees and employers
• arranging for the delivery of on and off-job training
• developing assessment resources, arranging trainee assessment and monitoring quality training and assessment through moderation and consent to assess processes
• reporting credits to NZQA.
Training providers (such as Grid Skills)

- Develop and deliver training to industry relevant standards, programmes and qualifications.
- Manage the quality of training and assessment in line with their own standards and to meet SSB requirements.
- Support learners and employers in training and assessment.
- Report credits to NZQA.

Employers

- Have systems that support and monitor learning.
- Plan for the learner to have sufficient time and training to gain experience.
- Arrange off job training where required.
- Allow Technical experts (and/or assessors) access to the learner and workplace assessment environment.
- Support learners to gather evidence by releasing documentation.
- Ensure assessment documentation is uploaded to MySkills.

NZQA qualification and programme structure

![Diagram showing the relationship between New Zealand Qualification, Programme of Study, and Standards to meet the programme.](Fig. 2: Developed by SSBs in consultation with industry groups)

Currently, qualifications in the transmission sector are achieved through completing training programmes made up of unit standards. Unit standards are a means of achieving and evidencing performance to industry and enterprise specific standards.
## Abbreviations

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<th>Description</th>
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<tr>
<td>A/NA</td>
<td>Assessment results A = achieved; NA = Not achieved</td>
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<tr>
<td>CSAM</td>
<td>Connexis Service Area/Account Manager – CSAMs support training and trainees in the workplace where the learner has signed a training agreement with the ITO (see below).</td>
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<tr>
<td>ITO</td>
<td>Industry Training Organisations – there are many ITO, set up by industry sectors to manage industry training. ITO are standard setting bodies responsible for maintaining the national standard within the scope of their industry. Connexis is the standard setting body for the electricity supply industry.</td>
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<tr>
<td>NZQA</td>
<td>New Zealand Qualifications Authority – this body has an overarching role in quality assurance of New Zealand qualifications. NZQA administers qualifications, assures qualification quality, manages the school-based examination system.</td>
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<tr>
<td>PTE</td>
<td>Private Training Establishment – an establishment that provides post-school education and training and is registered by NZQA. Transpower Grid Skills is a PTE.</td>
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<tr>
<td>RCC</td>
<td>Recognition of Current Competency – an assessment method applied for the achievement of whole qualifications (and, in some cases, part qualifications) by recognising knowledge and skills gained through work experience and/or other training.</td>
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<tr>
<td>ROA</td>
<td>Record of Achievement – the NZQA document that records achievement to New Zealand qualifications. Each person with an NZQA number has an ROA.</td>
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<tr>
<td>SSB</td>
<td>Standard Setting Body – responsible for developing and registering qualifications with NZQA. NZQA and Connexis are standard setting bodies.</td>
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<tr>
<td>TEO</td>
<td>Tertiary education organisations (TEOs) – are universities, polytechnics, private tertiary education providers, government training organisations, and other providers.</td>
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www.transpower.co.nz/gridskills

Name:

Phone Number: