

Guidelines for Subject Matter Experts and Program Evaluators

Overview

Institutions submitting a program for approval may be required to provide a program evaluation.

Designated/interim designated institutions applying for approval of a Class A program must submit a program evaluation unless the registrar has informed the institution that an evaluation, or certain elements of the evaluation, is not required.

The registrar may also require a program evaluation from a registered institution who submits a Class A program for approval, a designated/interim designated institution who submits a Class B or Class C program for approval, or an institution who submits a program change that requires approval.

It is the responsibility of the institution to pay for the program evaluation.

The registrar may appoint subject matter experts (SMEs) as inspectors. SMEs are not considered employees of the Ministry of Advanced Education and Skills Training or PTIB.

SMEs and program evaluators must have expertise in career occupations that are relevant to the program of instruction. They must not receive any benefit from the institution, other than the payment from the evaluation, nor be a related party.

Programs requiring approval from the registrar fall into three categories:

- Class A:** Career-related programs with 40 or more hours of instruction, for which tuition is at least \$4,000.
- Class B:** Career-related programs at designated/interim designated institutions, other than Class A programs, for which tuition is at least \$1,000.
- Class C:** Language programs at designated/interim designated institutions that are longer than six months or for which tuition is at least \$4,000. A language program is defined as a program that has as its learning objective that students gain or improve proficiency in a language.

Program Evaluations

Institutions may find potential evaluators (PE) through professional associations, business networking, regulators, other institutions (public or private), members of their program advisory committee, etc. Also, the PTIB website provides a list of people with subject matter expertise in a variety of fields: an appropriate PE may often be found on this list. <https://www.privatetraininginstitutions.gov.bc.ca/institutions/subject-matter-experts>. Institutions may contact them directly to see whether they wish to take on an evaluation.

In choosing a prospective program evaluator, ask them for a formal CV or résumé, and take time to confirm the elements of their background that are relevant to the program you want them to evaluate: education/credentials, occupational experience, possible conflicts of interest or other relationship to the institution (e.g. work for another entity under the same ownership). The institution contracts with and pays the evaluator: be sure to establish terms in advance.

A program evaluator should meet the minimum instructor qualifications appropriate for the program (vocational, academic or language). See Private Training Act Policy Manual s.3.2.8 for reference.

It is the institution's responsibility to ensure that the evaluator has the appropriate background and expertise. If an evaluation report is not completed by an appropriate PE the registrar may, at her discretion, decline to accept it as meeting the requirement and require an entirely new report. The registrar may also deny the application.

It is also the responsibility of the institution to arrange and pay for the evaluation. The cost of evaluations can be discussed between the institution and the program evaluator. A site-visit by the program evaluator is required as part of the evaluation.

PTIB may accept a report prepared by the applicable regulator or accrediting body. Contact PTIB if you wish to request that PTIB accept a regulator or accrediting body report in place of a program evaluation.

The complete evaluation report must be sent directly to PTIB by the program evaluator. Where appropriate, the PE may choose to include photographs or other documentation with their report. The report should be emailed as an attachment and sent to PTI@gov.bc.ca.

The institution's response to the PE's recommendations should be submitted as part of the program application. A Program Evaluation Report template and New Program Evaluation Guide are provided at <https://www.privatetraininginstitutions.gov.bc.ca/form-library>

If you have any questions about how to complete the Program Evaluation please contact PTIB at 604-569-0033 or PTI@gov.bc.ca.

Subject Matter Experts Appointed as Inspectors by PTIB

PTIB may appoint an SME as an inspector as part of a Designation Review for the purpose of determining whether an institution complies with the *Private Training Act* and its associated regulations.

SMEs appointed should refrain from representing themselves as employees of PTIB or the Government of BC in promotional materials. This is a term in the General Service Agreement.

The Review will focus on compliance standards that relate to approved programs of instruction, as well as standards related to instructors, students, and instructor records and policies set out in the *Private Training Regulation*.

PTIB staff lead Designation Reviews and will hold an orientation meeting for a Designation Review to familiarize SMEs with the Designation Review process, plan the inspection, and address any questions.

Process to Engage an SME

The process for PTIB to engage an SME as an inspector is as follows:

1. PTIB identifies the need for an SME.
2. PTIB will select an SME based on relevant expertise and other applicable factors (ie. geographic proximity for an on-site inspection).
 - If an SME cannot be identified from the SME list, PTIB will contract with a new SME.
3. PTIB will contact the SME to discuss the SME's availability. PTIB will confirm with the SME and the institution whose program is being reviewed whether there is any conflict of interest.
4. PTIB sends the SME an Appointment as Inspector, Subject Matter Expert letter that outlines the details relevant to the inspection and/or program evaluation, including the due date for a program evaluation.

Role of an SME in a Designation Review

The role of an SME is to:

- Ensure an institution's compliance with specific aspects of the *Private Training Act* and its associated regulations by reviewing requirements and standards related to programs of instruction either in-person or electronically.
- Act as part of a team of SMEs with each SME assigned to review programs based on their areas of expertise.
- Complete the Subject Matter Expert Program Evaluation Designation Review for the assigned program(s).
- Work in collaboration with the Designation Review Team to develop student, instructor, and staff interview questions for on-site visits.

Preparation for the Review:

- Read and familiarize yourself with the materials provided by PTIB in advance of the orientation meeting.
- Prepare notes/observations in advance of the orientation meeting.
- Review the institution's website and conduct an internet search in advance of the orientation meeting to familiarize yourself with the institution, how it advertises, and what information may be publicly available (i.e. Facebook etc.).
- Bring your laptop and other equipment required for the program review.

During the Review:

- Attend student, instructor, and staff interviews to take notes as they relate to the programs being reviewed.
- For each program you have been appointed to evaluate, conduct a review of :
 - student records,
 - program information,
 - admission requirements,
 - student evaluations,
 - course and instructional materials,
 - program delivery,
 - staff and instructors,
 - facilities and equipment,
 - work experience, and
 - the Program Advisory Committee,
- Where issues arise, take note of specific examples.
- Participate in an end of day debrief with the institution to request any additional information required to complete your evaluation(s).

Post-Review:

- Complete the Subject Matter Expert Program Evaluation Designation Review for each program you have been appointed to evaluate.
- Provide sufficient information and examples to support your findings.
- Send the evaluations electronically to PTIB by the due date outlined in the Appointment of Inspector, Subject Matter Expert letter.
- PTIB will communicate any required edits to the evaluations to finalize.
- Return all reviewed materials to PTIB.

Protocol

Below is a list of protocols when conducting work as an SME:

- Interact with the institution representatives and fellow SME team members with courtesy and respect.
- All records of the SME program evaluation process are subject to the *Freedom of Information and Protection of Privacy Act*, which includes notes written on reports, post-it notes, and all electronic communication. We advise SMEs to be mindful of this when documenting findings.
- All issues and/or concerns must be reported to PTIB staff as soon as possible.
- Please save all documentation in your Document Library on the PTIB Virtual Inspections SharePoint site - do not save any information related to the program evaluations on your personal hard drive.

Specifically for conducting SME program evaluations as part of an onsite inspection at the institution:

- Leave yourself enough time to park, get organized, and begin on time.
- Dress code is business casual.
- All discussions about the program evaluation must take place in the PTIB's designated meeting room at the institution and be kept strictly confidential.
- Do not engage in any discussions with the institution's staff, instructors, or students on your own – always ensure that another team member or PTIB representative is present to document the conversation.
- If your opinion is requested, you may provide it; however, with the caveat that it is an opinion only and the institution should always research all options and ensure they are in compliance at all times.
- If you require materials, photocopies, or supplies, provide a list to the PTIB representative.
- If you require photographs to be taken as additional supporting evidence (broken or unsafe equipment, dirty or unsanitary conditions, etc.), identify what needs to be photographed to the PTIB representative onsite and the PTIB representative will take photographs.

Frequently Asked Questions

What if I am contacted by a certified or not-yet-certified private training institution to conduct a program evaluation?

PTIB does not regulate the relationship between a program evaluator and an institution for program evaluation required as part of a program application. If however you have questions, you can contact PTIB's Program Manager at 604-569-0033 or PTI@gov.bc.ca.

How long does each program review or Designation Review take?

A Program Evaluation will typically take one day, but may take longer if there are multiple institution locations that need to be inspected.

A Designation Review is typically conducted over a two day period however additional days may be required depending on the number of programs and institution locations. SMEs will need to spend additional time prior to the Designation Review to review the materials, and after the Review to write the report.

How can I have my General Service Agreement extended?

PTIB will be in touch with you closer to the end of your 18 month term.

Why do I have to obtain WorkSafe BC Personal Optional Insurance?

SMEs are not covered under the *Workers Compensation Act*. WorkSafe is the only option for workers compensation insurance in BC. The application process takes up to 10 business days therefore, once you receive a letter of engagement from PTIB, we encourage you to apply at that time to avoid delays.

How do I bill PTIB for GST?

Please provide your GST number on invoices submitted. For any other tax related questions, we advise you to speak to your accountant or Canada Revenue Agency.

How can I report my income as an SME?

PTIB does not provide any type of tax forms such as a T4. SMEs are not considered employees of the Ministry of Advanced Education and Skills Training but instead considered self-employed contractors.

How do I get my contact information on the PTIB website?

If you have pre-qualified as an SME, email PTI@gov.bc.ca and request to have your name added to the pre-qualified SME list. Note that this is voluntary and you may choose to be removed at any time.

What kind of equipment is required to perform SME responsibilities?

SMEs must use a personal laptop and internet connection for the purposes of completing reports. Laptops are not provided by PTIB. Note that SMEs must maintain and follow a documented process for limiting access to sensitive information (refer to Schedule G of Section 9 of the General Service Agreement).

What expenses are covered?

Expenses can be claimed for travel, accommodation, and meal expenses for greater than 32km from your city of residence under most circumstances according to prescribed government policy. Please familiarize yourself with the maximums allowable by referring to your General Service Agreement.

Would there be additional time and pay provided for reading materials and writing reports?

SMEs will receive the daily rate or prorated portion of the daily rate for time spent conducting reviews and writing reports. SMEs are responsible for reporting the amount of time worked.

Who does the SME contact if they have any questions?

PTIB will provide the SME with an appointment letter for the Designation Review. The appointment letter will identify the PTIB representative for the Review. This representative will be the SME's main contact for any questions.

Can payment be issued to an SME's business?

If an SME wishes to receive payment through their business, the General Service Agreement must be made between the Ministry of Advanced Education and Skills Training and the SME's business.

How can an SME terminate a General Service Agreement?

SMEs should notify PTIB in writing of their intent to terminate the agreement. PTIB will confirm receipt and remove the SME's contact information from the PTIB website (if applicable). In the case that either the SME or PTIB terminates the agreement, the SME would be paid for all work done up to the date of termination.

If you have any questions, email PTI@gov.bc.ca or call 604-569-0033.