Construction Sector Council (CSC)

in partnership with

Canadian Association of Home & Property Inspectors (CAHPI)

CHIBO II Project

National Certification and Accreditation Model
for Home and Property Inspectors

October 2005

CANADIAN ASSOCIATION OF
HOME & PROPERTY INSPECTORS
ASSOCIATION CANADIENNE DES
INSPECTEURS DE BIENS IMMOBILERS

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SECTOR COUNCIL
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DE LA CONSTRUCTION

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alliance

CMHC SCHL

First Nations National Building Officers Association
Association nationale des agents du bâtiment des premières nations

Acknowledgements

The Construction Sector Council (CSC), in conjunction with the Canadian Association of Home and Property Inspectors (CAHPI), is pleased to present the Certification and Accreditation Model for Home and Property Inspectors.

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- The Alliance of Certified Building Officials' Associations (ACBOA)
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This project is dedicated to the memory of Michael Ludolph, who as the Chair of the CHIBO Working Committee guided the Committee through some very difficult times.

Executive Summary

In Canada, home and property inspectors provide two essential services:

- Private home inspection services to existing residential and small commercial buildings
- Advising on the condition of buildings and building components

In 1999, the Canadian Home Inspectors and Building Officials National Initiative (CHIBO) was launched to enhance the credibility and status of the building inspection industry, as well as to harmonize licensing, standards of performance and certification of both home and property inspectors and professional building officials across Canada.

The industry-led initiative began as a partnership effort involving the Canadian Association of Home and Property Inspectors (CAHPI) and the Alliance of Canadian Building Officials' Associations (ACBOA) and the first deliverable from the CHIBO initiative was the development of National Occupational Standards (NOS) for Home and Property Inspectors (HPI) and Building Officials (PBO) respectively. The National Occupational Standards describe the range and depth of skills, knowledge and ability necessary to perform occupational tasks at a professional level.

As a result, the Canadian Association of Home & Property Inspectors (CAHPI) was formed to represent the existing provincial associations and oversee a uniform national standard of competency, certification and accreditation for the private home inspection industry.

At the present time the Canadian home and property inspection occupation is largely unregulated. While a national certification program would provide benefits to individual home and property inspectors, widespread acceptance of national certification will only come when influential national groups that use the services of home and property inspectors exert pressure on the industry. Groups that could exert strong pressure for the national certification of home and property inspectors include:

- Mortgage Lenders
- Realtors
- Property Insurers
- Provincial Regulators
- Professional Liability Insurance Underwriters

In 2003, the second CHIBO project commenced (CHIBO II). The primary objective of CHIBO II was:

> *'To establish and develop certification and accreditation models that will lead to a recognizable and credible inspection industry and also increase worker mobility between jurisdictions'*

The CHIBO project consisted of four 'steps'. The first step consisted of a documentation review and gap analysis. The CSC reviewed existing curriculum and training materials and compared the materials to the National Occupational Standard developed for home and property inspectors. The second step consisted of a review and assessment of existing certification models for home and property inspectors, leading to a national certification model. The third step consisted of a review and assessment of existing models used to accredit course, programs, and training providers. The fourth step consisted of the creation of a basic

strategic framework for the model. Although there are some unknowns, the strategic framework outlines how the model for home and property inspectors could be implemented.

The governance and structural elements of the models are based on criteria defined in the CAN-P-9 Standard 'Criteria for Accreditation of Personnel Certification Bodies'. The CAN-P-9 Standard is published by the Standards Council of Canada, and is based on the international ISO standard ISO/IEC 17024.

This report assumes CAHPI will hold the right to certify. Elements of this authority will be delegated to a National Certification Council, a National Registrar, a National Accreditation Committee, and to other committees, associations, and organizations as appropriate.

Individuals who are within the National Certification Program will be at one of two stages – 'Candidate' or 'National Certificate Holder' (NCH). The 'Candidate' stage is for individuals who have the appropriate training and who have displayed the required degree of competence to be home and property inspectors but lack experience to obtain certification. The 'NCH' stage is for individuals who have the appropriate training, experience and competence.

A 'Background Review' process will be used by the National Certification Council to determine the appropriate stage for each individual. Any individual who wants to be considered for either stage would apply to the National Certification Council and present their personal background. Background review criteria are based on the tasks defined in the National Occupational Standard for home and property inspectors.

Accreditation is the process a certification body uses to determine whether the courses or programs offered by training providers meet some or all of the skill and knowledge requirements of a National Occupational Standard. It also involves an assessment of a provider's ability to provide a consistent standard of training. For home and property inspectors, accreditation will be the responsibility of a National Accreditation Committee. As part of this project, a large number of courses and programs related to home and property inspection were reviewed and compared to the National Occupational Standard.

In order to implement and administer the National Certification Program a number of roles would need to be established, with formally defined responsibilities and inter relationships. These roles include the:

- National Certification Body (CAHPI)
- National Certification Council
- National Registrar
- National Accreditation Committee

All roles and responsibilities related to the National Certification Program will be aligned to CAN-P-9 criteria.

Other issues to consider prior to implementation include the large number of home and property inspectors who will need to undergo background review in order to be properly placed within the national certification program, the time that a National Certification Council will require to conduct background review, and the cost of conducting background review.

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Background

The Canadian building inspection industry is composed of individuals employed as Home and Property Inspectors (HPI), Professional Building Officials (PBO) and First Nations building officers (FNBO).

- Home and Property inspectors (HPI) provide private inspection services to existing residential and small commercial buildings. Home and property inspectors act as advisors on the condition of buildings and building components
- Professional Building Officials (PBO) are responsible for plan review and inspection services to ensure that construction projects are code compliant. As a rule, PBOs are employed or contracted by government and are 'appointed' by government to enforce the building code
- First Nations Building Officers (FNBO) generally provide inspection services for buildings located on First Nations lands in Canada. Services provided by FNBOs may include plan review, inspections, and recommendations for repairs, technical advocacy and advisory roles for both residential and commercial buildings

Note: This report and the certification and accreditation process focuses on the Home and Property Inspector occupation of the building inspection industry.

During the 1990s, Canada Mortgage and Housing Corporation (CMHC) undertook a great deal of research into the building inspections industry, with particular emphasis on private home and property inspections. The research concluded that the home and property inspection industry is highly fragmented, consisting of a variety of private inspection associations, organizations, franchises and firms. The research concluded that each organization/association maintained different inspection standards and different levels of qualifications for their members as well as highlighting the key differences and variations in the availability and quality of the home inspection services being offered in Canada.

When reviewing the industry's training and education materials, the research found that the materials were typically shared among various provincial home and property inspection associations and in general could be improved. Other points highlighted through CMHC's research included:

- The lack of a national code of ethics. Where code of ethics did exist was at the provincial level and each varied considerably from province to province
- Differences in certification requirements and procedures across Canada
- A lack of portability of certification from one province to another
- A lack of minimum standards of performance required to work as a home and property inspector

To help bring some structure and rigor to the home and property inspection sector a 1996 CMHC industry survey concluded that separate and distinct national bodies should be formed to represent home and property inspectors and professional building officials. As a result, the Canadian Association of Home and Property Inspectors (CAHPI) was formed to represent the existing provincial home and property inspection associations and to oversee a uniform national standard of competency for the private home inspection industry. The building officials already had a national body, the Alliance of Canadian Building Officials Associations (ACBOA) to represent their provincial associations.

The Canadian Home Inspectors and Building Officials (CHIBO) Initiative

CHIBO I

In 1999, the Canadian Home Inspectors and Building Officials National Initiative (CHIBO) was launched to enhance the credibility and status of the building inspection industry as well as to harmonize licensing, standards of performance and certification of both home and property inspectors and professional building officials across Canada. The industry-led initiative began as a partnership effort involving the Alliance of Canadian Building Officials' Associations (ACBOA) and the Canadian Association of Home and Property Inspectors (CAHPI). The two associations contributed funding to the project, which was also supported by CMHC and the former federal department of Human Resources Development Canada (HRDC), now Human Resources and Skills Development Canada (HRSDC).

The CHIBO I initiative was successfully completed in May of 2001, with the delivery of the following documents:

- National Occupational Standards: Professional Home and Property Inspector
- National Occupational Standards: Professional Building Official
- Common Core Competencies for Professional Home and Property Inspector and Building Officials

The National Occupational Standards (NOS) developed for each profession are very detailed describing the range, depth of skill, knowledge and ability necessary to perform the associated tasks at a professional level.

In March 2003, the First Nations National Building Officers Association (FNNBOA) also completed an occupational standard based on the above to reflect the core competencies required to function in First Nations communities. FNNBOA joined the CHIBO initiative after the completion of CHIBO Phase I.

CHIBO II

In December 2003, the second phase of the CHIBO initiative commenced with the signing of a Memorandum of Understanding (MOU) between the Construction Sector Council (CSC) and CHIBO (CAHPI, ACBOA and FNNBOA). The MOU outlined the roles and responsibilities associated with the design and development of certification and accreditation models which reflect the National Occupational Standards of each occupation. A project Working Committee consisting of representatives from the Canadian Association of Home and Property Inspectors (CAHPI), the Alliance of Canadian Building Officials' Associations (ACBOA), and the First Nations National Building Officers Association (FNNBOA) was established to help develop and set the direction of the CHIBO II initiative. Also represented at the Working Committee level in an ex-officio capacity were representatives from the CSC, HRSDC and CMHC. It is important to note however, that although representatives from FNNBOA participated and contributed to the development of the certification and accreditation models, FNNBOA is developing First Nation specific certification and accreditation models which are outside the scope of the CHIBO II initiative.

The rationale for inclusion of FNNBOA was to ensure that the certification and accreditation models being developed for the home and property inspector and professional building inspector occupation are flexible enough to allow for the First Nations Building Official (FNBO) occupation to use and modify at a later date to reflect the specific needs of the FNBO occupation as per the National Occupational Standards for FNBO.

The primary goal of CHIBO II was:

'To establish and develop certification and accreditation models that will lead to a recognizable and credible inspection industry and also increase worker mobility between jurisdictions'

Specific project objectives included:

- A high level comparative analysis of the current curriculum and training materials to determine their future use in the development of courses related to the National Occupational Standards for the 'home and property inspector' and 'professional building official' occupations

- The identification of training providers (private and public) with experience in certification training, and the capability and infrastructure to develop and deliver curriculum and training programs that meet the requirements of the National Occupational Standards. The list of training providers was *NOT* intended to be a comprehensive listing of all training providers, but rather to act as a starting point for the building inspection industry to determine which types of training institutions have the capabilities and the 'appetite' to provide the necessary certification training for building officials and home and property inspectors

- The identification and development of a national certification model for the professional building official and home and property inspector occupations

- The identification and development of a national accreditation model for the professional building official and home and property inspector occupations

- The development of a strategic framework for the roll-out of the certification and accreditation models for both occupations

- A framework or process for building officials and home and property inspectors to conduct a complete program review of their existing certification programs against the tasks listed in the National Occupational Standard (NOS) for each occupation

The 'Business Case' for National Certification for Home and Property Inspectors

Currently, there is no national certification or accreditation model for the HPI sector. Why is there a need for a national certification and accreditation model for home inspectors, especially when there is evidence to suggest that a few of the associations representing the HPI sector have already established certification designations and training programs?

For the most part, the Canadian home and property inspection occupation is unregulated. As a result of the lack of regulation and training standards associated with this profession, there is:

- No legislation requiring home and property inspectors to be members of any association
- No requirement for home and property inspections to comply with any standard of practice
- Nothing preventing an individual from 'printing business cards' and providing home and property inspection services to the general public

With the development of a national certification program the HPI sector will benefit through:

- Credential portability – a credential that would be recognized across Canada and possibly elsewhere
- Training – broader opportunities to be trained to meet or exceed the requirements of the National Occupational Standard (NOS)
- Networking – with other home and property inspectors
- Greater credibility with customers – assuming that customers see the value of a national credential

Despite the increased visibility and recognition that a national certification program will bring to the industry, the acceptance of national certification (by individual home and property inspectors) will only come when influential national groups that use the services of home and property inspectors exert pressure on the industry. Groups that could exert this kind of pressure include mortgage lenders, realtors, property insurers, provincial regulators and professional liability insurance underwriters.

Mortgage Lenders

Although it is not common for mortgage lenders to require that a home and property inspection be conducted prior to releasing funds, banks, credit unions, and other mortgage lenders would benefit from a home and property inspection service that provides them with some assurance that the properties they are mortgaging are structurally and mechanically sound.

Many mortgage lenders are national in scope – operating across the country. To gain credibility with national mortgage lenders, the providers of home and property inspections must provide a service that is consistent across the country. A national certification body for home and property inspectors (CAHPI) will provide a uniform standard of practice and code of ethics to ensure consistency.

Realtors

Realtors are the primary source of business for many home and property inspectors. A national certification program will provide realtors and their clients with assurance that home and property inspections are being conducted in a consistent and professional manner. The Canadian Real Estate Association (CREA) represents the interests of realtors across Canada. There are also a number of national real estate companies which use the services of home and property inspectors. These companies could require that inspectors be nationally certified.

Property Insurers

Property insurers would benefit from a home and property inspection service that provides them with some assurance that the properties they agree to insure are structurally and mechanically sound. Many property insurance underwriters are national in scope – operating across the country. To gain credibility with national insurance underwriters, the providers of home and property inspections must provide a service that is consistent across the country. A national certification program for home and property inspectors will provide a uniform standard of practice and code of ethics to ensure consistency.

Provincial Regulators

At the present time no province requires that home and property inspectors be members of a provincial or national association or hold any type of certification. The political argument for national certification of home and property inspectors centers on the need to protect the public from unscrupulous and/or incompetent practitioners. There are a number of Canadian legal cases involving homeowners who have sued over alleged improper inspections. In time, this political pressure may push some provinces to require certification and/or association membership.

National certification would provide provincial regulators with some assurance that home and property inspection services available in a province are consistent with services available in other parts of Canada.

Professional Liability Insurance Underwriters

The use of litigation in cases where a house inspection has been performed incorrectly is increasing. This trend may drive liability insurance underwriters (and error & omissions insurance underwriters) to demand a higher or more consistent standard of practice from home and property inspectors before they will underwrite professional liability and/or error and omissions insurance.

Alternatively, underwriters may provide preferred rates to home and property inspectors who are members of a CAHPI Provincial Association and/or are certified to meet the National Occupational Standard and National Standard of Practice.

Home and Property Inspectors Project Methodology

The CHIBO project was carried out in steps. Each of these steps was incremental, and was designed to build upon each other. They include:

- Step 1: Documentation Review, Framework Analysis, and "Gap" Analysis
- Step 2: Design and Development of the Certification Models and Implementation Outlines
- Step 3: Design and Development of the Accreditation Models and Implementation Outlines
- Step 4: Strategic Framework

Step 1: Documentation Review, Framework Analysis, and "Gap" Analysis

The first step of the project consisted of a documentation review and gap analysis. Existing curriculum and training materials were reviewed and compared against the National Occupational Standard developed for professional building officials. This work consisted of:

- Defining curriculum and training programs that need to be developed to ensure that National Occupational Standards are met
- Creating a list of private and public training providers experienced in certification training that have the capability and infrastructure to implement curriculum and training programs in accordance with the National Occupational Standards

Note: The list of training providers was not intended to be a comprehensive listing of all providers. It was only intended to be a starting point for the industry to determine the types of training providers that have the capabilities and the "appetite" to provide the necessary certification training for home and property inspectors.

A large number of home and property inspection courses and programs delivered by both public and private sector training providers were reviewed. The course and program content and instructional levels were reviewed using a taxonomic analysis method, which considered both 'knowledge' and the 'application of knowledge'. The analysis also linked course and program content to the Blocks and Tasks defined in the National Occupational Standard for home and property inspectors. (For more information about the taxonomic analysis, refer to Appendix A of this report).

The data gathered from the documentation review was captured in a searchable Access database. The database has been designed to provide information to the HPI sector on:

- Courses and programs that address specific tasks in the National Occupation Standard
- Courses and programs provided by each training provider
- Region of course or program delivery
- Delivery method of courses and programs

The database will allow CAHPI's National Certification Council to determine if an individual has the necessary technical education to enter into the national certification program.

Step 2: Design and Development of the National Certification Model

This step consisted of a review and assessment of existing certification models for home and property inspectors. The review covered the certification models currently used by:

- Provincial associations of home and property inspectors
- Private companies that train and 'license' home and property inspectors
- Home and property associations in the United States
- Provincial associations for individuals working in similar occupations, such as professional building officials

The review also examined the certification programs, bylaws where available, and the organization structure of the certifying bodies (where available). The review also covered the 'CAN-P-9 Standard' - an ISO guideline for structuring certification bodies.

> **Note**: The CAN-P-9 standard is the basis for the national certification model for home and property inspectors.

Once the review of existing certification models was complete, relevant elements of the existing models were presented to the Working Committee. These elements coupled with input from the Working Committee form the basis of the national certification model. The draft model was presented and/or distributed to home and property inspectors across Canada for comment and feedback. As a result of this feedback the model went through a number of revisions.

Step 3: Design and Development of the National Accreditation Model

This step consisted of a review and assessment of existing models used to accredit course, programs, and training providers. The review covered accreditation models currently used by:

- Provincial associations of home and property inspectors
- Home and property associations in the United States
- Provincial associations for individuals working in similar occupations, such as professional building officials

Once the review of existing accreditation programs was complete, a national accreditation model was developed. As with Step 2, the draft national accreditation model was presented and/or distributed to home and property inspectors across Canada for comment and feedback. As a result of this feedback the model went through several revisions.

The CAN-P-9 Standard (accreditation elements) formed the basis for the national accreditation model for home and property inspectors.

Step 4: Strategic Framework for the National Certification & Accreditation Models

This step consisted of the creation of a strategic framework for the implementation of the models. Although there are some unknowns, the implementation plan outlines how the national certification and accreditation model for home and property inspectors could be implemented.

The strategic framework:

- Compared the national certification model to existing provincial certification models to determine where provinces have certification schemes that meet or exceed the requirements of the national certification model
- Made a series of recommendations on how the national certification model should align with CAN-P-9 criteria
- Noted any other considerations that could affect the implementation of the national certification model
- Created a preliminary timeframe for implementation

The CAN-P-9 Standard

As mentioned previously, the national certification and accreditation models developed for this project have been built using the criteria defined in the CAN-P-9 Standard. The CAN-P-9 Standard is based on the international ISO standard ISO/IEC 17024 and is published by the Standards Council of Canada,

Essentially, CAN-P-9 is the standard that defines 'Criteria for Accreditation of Personnel Certification Bodies'.

The introduction to the CAN-P-9 document states:

> *"This international standard has been drawn up with the objective of achieving and promoting a globally accepted benchmark for organizations operating certification of persons. Certification of persons is one means of providing assurance that the certified person meets the requirements of the certification scheme. Confidence in the respective certification schemes is achieved by means of a globally accepted process of assessment, subsequent surveillance and periodic re-assessments of the competence of certified persons."*
>
> *Source 'Criteria for Accreditation of Personnel Certification Bodies' CAN-P-9*
> *Published by Standards Council of Canada, April 2003*

An article on the CAN-P-9 Standard by Penny Silberhorn, Canadian Standards Board, states:

> *"This comprehensive standard lays out the general operating requirements for the certification body, including provisions for a management system. It describes conditions for application, examinations, surveillances and recertification. And, it specifies the requisites for independence of training from certification, confidentiality of information, competence of staff and subcontractors, and the need for stakeholder input into certification schemes."*
>
> *Source 'Calibre', Winter 2002 Issue*

The rationale for the selection of CAN-P-9 methodology as the basis for building the certification and accreditation models is as follows:

- CAN-P-9 is the globally accepted benchmark for organizations operating certification of persons
- CAN-P-9 is the basis for recognition of certification bodies and their certification schemes, in order to facilitate their acceptance at a national and international level
- CAN-P-9 specifies requirements which ensure that certification bodies operating certification schemes for persons operate in a consistent, comparable, and reliable manner

For further information on the CAN-P-9 standard, please go to www.scc.ca

The national certification and accreditation model for home and property inspectors is intended to comply reasonably closely with CAN-P-9 criteria as published by the Standards Council of Canada. This does not guarantee or ensure that the model is in complete compliance with CAN-P-9 criteria.

In order to determine whether or not this model is in complete compliance with CAN-P-9 criteria, it would be necessary for the National Certification Body to undergo a comprehensive audit conducted by a firm qualified to conduct ISO audits. Such an audit is outside the scope of this project.

National Occupational Standard (NOS) for Home and Property Inspectors

The competency requirements for home and property inspectors are defined in the National Occupational Standard (NOS). To facilitate the understanding of the nature of the occupation, the work performed by home and property inspectors is divided into blocks, tasks, sub-tasks and supporting knowledge and abilities.

Block – the largest division within the analysis, and reflects a distinct operation relevant to the occupation.

Task – distinct, observable, measurable, activity that combined with others makes up the logical and necessary steps the practitioner is required to perform to complete a specific assignment within a block.

Sub-task — the smallest division into which it is practical to subdivide any work activity, and, combined with others, fully describes all duties constituting a task.

Supporting Knowledge and Abilities – define the elements of skill and knowledge an individual must acquire to adequately perform the sub-task. Examples of material, components etc. following the knowledge and ability statements are provided to further clarify the type and level of knowledge and ability required.

Below is a list of the various blocks and sub-tasks associated with being a home and property inspector.

Block A – Professional Practice

- Task 1: Performs pre-inspection procedures
- Task 2: Communicates orally
- Task 3: Provides written reports
- Task 4: Resolves conflicts
- Task 5: Recognizes legal responsibility

Block B – Exteriors

- Task 6: Visually inspects exterior structure
- Task 7: Visually inspects exterior elements
- Task 8: Visually inspects site elements

Block C – Interiors

- Task 9: Visually inspects windows and doors
- Task 10: Visually inspects insulation and ventilation
- Task 11: Visually inspects interior surfaces
- Task 12: Visually inspects interior structure

Block D – Heating and Air Conditioning

- Task 13: Visually inspects primary heating systems
- Task 14: Visually inspects supplemental heating systems
- Task 15: Visually inspects permanent cooling systems
- Task 16: Visually inspects air-handling systems

Block E – Plumbing

- Task 17: Visually inspects water service supply and distribution
- Task 18: Visually inspects and operates fixtures
- Task 19: Visually inspects and operates water heaters
- Task 20: Visually inspects drain, waste and venting

Block F – Electrical

- Task 21: Visually inspects exterior service entrances
- Task 22: Visually inspects main panel
- Task 23: Visually inspects distribution
- Task 24: Visually inspects outlets, switches and fixtures

The primary objective of the National Certification Program for home and property inspectors is to verify competence in each block and task, and in the sub tasks that define each task.

CAHPI Standards of Practice

Although the main criterion for determining an individual's competence as a home and property inspector is the NOS, standards of practice are also relevant. Standards of practice are important because they define the methodology for conducting home and property inspections.

In the case of the home and property inspectors the industry standards of practice have been developed by The Canadian Association of Home and Property Inspectors called the CAHPI Standards of Practice. The CAHPI Standards of Practice are based on Standards of Practice developed and adopted by ASHI – the American Society of Home Inspectors. Individual members of CAHPI provincial associations are required to apply the CAHPI Standards of Practice to their inspections.

Task Priority Analysis of NOS Tasks

A key component in determining the criticality of the tasks identified in the NOS is Task Priority Analysis or TPA. TPA is an assessment technique that is used to help determine which tasks are critical in the NOS and *MUST* be evaluated as part of the certification process.

For this project, the TPA involved a survey of practicing home and property inspectors from across Canada. The TPA asked for each practitioner to rate the importance of each of the 24 tasks identified in the home and property inspector's NOS. Tasks were rated against 4 criteria: danger, criticality, complexity and frequency. Each task was awarded a point score (1-5) against each criterion and an overall score (the sum of the 4 criteria scores).

The TPA allows for the rank ordering of tasks based on their importance, and allows for recommendations on which tasks *MUST* be evaluated under the certification model. Generally speaking, tasks that score less than 10 in overall rating are likely to be either specialty tasks (performed by a select few in the industry), or tasks that are so technically simple *OR* infrequently performed by the majority of practitioners that testing for it under a certification program is not necessary.

The rating criteria used are detailed below:

Danger Rating

There is a high risk of serious injury or death to the performer or to other persons if the task is not performed correctly	**5**
There is a risk of serious injury to the performer of other persons if the task is not performed correctly	**4**
There is a risk of moderate injury to the performer or other persons if the task is not performed correctly	**3**
There is a risk of moderate injury to the performer if the task is not performed correctly	**2**
There is virtually no danger associated with this task	**1**

Criticality Rating

There is a high risk that the performer will be subjected to MAJOR lawsuits or civil claims if the task is not performed correctly	**5**
There is a high risk that the performer will be subjected to lawsuits or civil claims if the task is not performed correctly	**4**
There is a moderate risk that the performer will be subjected to lawsuits or claims if the task is not performed correctly	**3**
There is low risk that the performer will be subjected to claims if the task is not performed correctly	**2**
There is virtually no risk associated with this task	**1**

Complexity Rating

This task is very difficult and lengthy to master and requires a great deal of concentration and practice to remain proficient	**5**
This task is difficult to master and requires concentration and practice to remain proficient	**4**
This task is moderately difficult to master and takes moderate concentration and occasional practice to remain proficient	**3**
This task is easily mastered and requires only minimal concentration and minimal practice to remain proficient	**2**
This task is easily mastered and once learned is routine	**1**

Frequency Rating

This task is performed at least once per day	**5**
This task is performed at least once per week	**4**
This task is performed at least once per month	**3**
This task is performed occasionally	**2**
This task is almost never performed	**1**

TPA Results

A total of 60 TPA surveys were received from home and property inspectors from across Canada. The regional breakdown of surveys received was

Region	Responses Entered in Database
British Columbia	16
Alberta	11
Manitoba	1
Ontario	20
Quebec	4
Nova Scotia	1
Unknown	7
National Total	**60**

During the development of the NOS, the original CHIBO I Working Committee made no attempt to prioritize the tasks in order of importance. The task priority analysis ranked the NOS tasks for home and property inspectors as follows.

Note: The higher the ranking, the more important the task is considered.

NOS Task #	NOS Task Description	Danger	Criticality	Complexity	Frequency	Overall Rating	Ranked Importance of this Task
7	Visually inspects exterior elements	4.4	4.2	3.8	4.9	17.39	1
22	Visually inspects main panel	4.6	3.7	4.0	4.9	17.28	2
23	Visually inspects distribution	4.5	3.7	4.0	4.8	16.97	3
6	Visually inspects exterior structure	3.6	4.3	3.6	4.9	16.44	4
13	Visually inspects primary heating systems	2.8	4.0	4.0	4.9	15.73	5
12	Visually inspects interior structure	2.4	4.2	4.0	4.8	15.45	6
21	Visually inspects exterior service entrances	3.8	3.6	3.3	4.8	15.43	7
14	Visually inspects supplemental heating systems	2.8	3.6	3.8	4.1	14.36	8
8	Visually inspects site elements	2.4	3.8	3.1	4.8	14.03	9
11	Visually inspects interior surfaces	2.5	3.2	3.1	4.9	13.78	10
10	Visually inspects insulation and ventilation	2.6	3.3	3.1	4.8	13.75	11
3	Provides written reports	1.0	4.2	3.5	4.8	13.64	12
2	Communicates orally	1.1	3.8	3.6	4.9	13.41	13
20	Visually inspects drain, waste and venting	1.9	3.5	3.0	4.9	13.33	14
19	Visually inspects and operates water heaters	1.9	3.3	3.1	4.8	13.03	15
17	Visually inspects water service supply and distribution	1.6	3.4	3.1	4.9	13.02	16
1	Performs pre-inspection procedures	1.1	4.0	2.9	4.9	12.92	17
24	Visually inspects outlets, switches and fixtures	2.4	3.0	2.6	4.9	12.90	18
5	Recognizes legal responsibility	1.1	4.5	4.0	2.9	12.48	19
16	Visually inspects air-handling systems	1.8	3.2	3.2	4.3	12.46	20
9	Visually inspects windows and doors	1.7	3.2	2.7	4.9	12.43	21
15	Visually inspects permanent cooling systems	1.7	3.4	3.5	3.7	12.37	22
18	Visually inspects and operates fixtures	1.4	3.4	2.5	4.9	12.23	23
4	Resolves conflicts	1.2	4.5	4.0	2.2	11.91	24

It is important to note that while the response rates for this survey were not sufficient to draw conclusions with a high degree of statistical confidence, the data does represent a pan-Canadian view of which tasks are considered most important by practicing home and property inspectors. To validate and substantiate these results, a more comprehensive TPA could be done at a later date.

It is also important to note that the lowest score for any task (Task 4, Rating 11.91) is above the threshold where we would question its inclusion in certification exams. As a result, it was concluded that specific technical training should be available for all tasks in the NOS, and competency in each task area should be verified through the national certification model.

Authority to Certify

The key to any successful certification program is the ability to certify individuals who meet the competence standard for their occupation. A certification model is only as good as the certification body's ability to certify individuals against that standard (NOS).

Authority to Certify : Definition

- The authority or right to certify individuals as competent to practice or work within an occupation or profession
- Authority to certify may be provincial, national, or international
- In the case of a national certification, authority to certify would have to be national. However, national certification may not be recognized as valid within a province or sufficient to practice or work within a province
- Authority to certify may be granted through legislation, or simply assumed by a national organization
- The authority to certify home and property inspectors will be held by CAHPI which can delegate or transfer parts of this authority as the need arises
- More than one type of National Certification for an occupation or profession may exist

National Certification Council

In the case of the home and property occupation, the Working Committee determined that CAHPI would become the National Certification Body and create a National Certification Council.

CAN-P-9 criteria do not allow decisions on certification to be subcontracted. However, other organizations could provide the National Certification Council with recommendations as to whether specific individuals meet the background requirements of the National Certification Program.

Elements of the national certification model developed by the CHIBO Working Committee would be difficult for a National Certification Council to administer. Therefore, this model assumes that associations at the provincial level will be involved in the National Certification Program and will provide recommendations on certification to the National Certification Council.

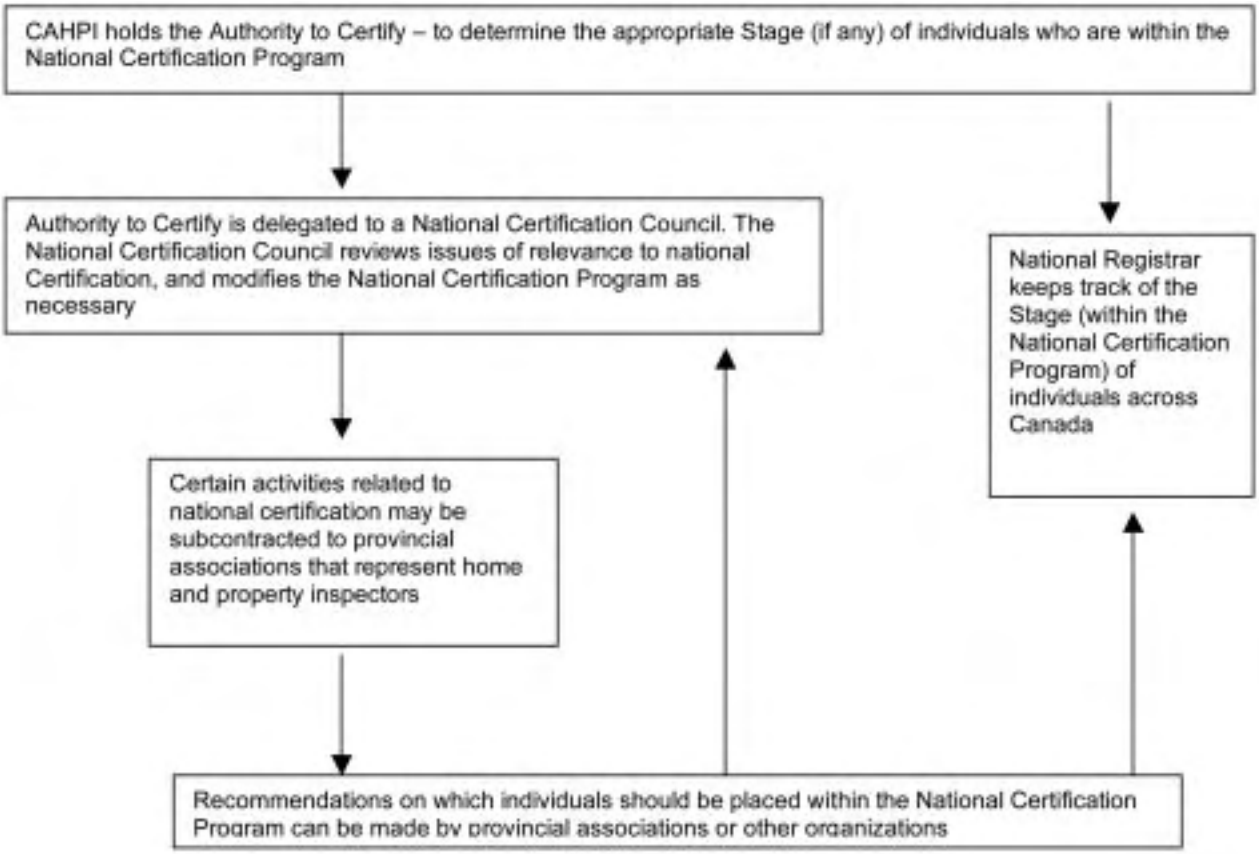
National Registrar

The National Certification Body requires a national registrar. The national registrar will be responsible for recording and tracking individuals who are within the national certification program. The national registrar will also be responsible for maintaining the integrity and confidentiality of the data and personal information contained in the database as well as ensuring that the register of certified individuals is kept up to date and open for public scrutiny.

Authority to Certify

The National Certification Council will be empowered with the authority to certify individuals as being competent to practice or work within the home and property inspection occupation. Because this project called for the development of a national certification model for HPIs, the authority to certify will reside at the national level. It is important to note, national certification may not be recognized as valid within a province or be deemed sufficient to practice or work within a province.

The flow chart below graphically lays out how the authority to certify functions



The Certification Process

The Two-Stage Approach to Certification

The certification model for the HPI sector is a two-stage process. An individual who is within the national certification program is classified as being either a 'Candidate' or 'National Certificate Holder'.

Candidate – classification given to an individual who has the appropriate training but lacks the experience and/or competence to become a 'National Certificate Holder'.

'National Certificate Holder' – classification given to an individual with the appropriate training, experience and competence.

The two-stage approach allows inexperienced individuals to gain home and property inspection experience while working within the National Certification Program. This allows the National Certification Body (CAHPI) to exercise a degree of regulation over the practice of individuals at the candidate stage, while recognizing their achievement along the way.

Background Review

To determine where an individual fits within the national certification program, an assessment process called a 'background review' is used. Background review is the process that the certification council uses to determine if an individual should be within program, and if so, at what stage. An individual who wants to be considered for any stage, would apply to the National Certification Council (CAHPI) and present their personal background. An individual's personal background would be presented through a structured application form completed by the individual, which may be supplemented if necessary through an interview.

The criteria used to assess an individual during the background review process are discussed in 'Certification Program' section of this report.

Ethics and Professional Standards

A key component of the national certification program is 'ethics and professional standards'. Ethics and professional standards provide the public with assurance that individuals who are within a national certification program will abide by a set of rules and be governed by standards of practice that are enforceable. This component of national certification is part of the CAN-P-9 criteria.

CAHPI has developed a Code of Ethics and Standard of Practice for the HPI occupation.

Maintenance Requirement

In order to ensure the competence of 'Candidate' and 'National Certificate Holder' home and property inspectors, the national certification program will include a maintenance requirement. Maintenance activities could include any and all of the following:

- Continued industry involvement
- Courses
- Continued professional development
- Association membership
- Meeting attendance, etc.

In developing the certification model, the Working Group determined that the maintenance component of the national certification program could include any and all of the following activities:

- Continued membership in good standing of a provincial association of home and property inspectors
- Attendance at courses on technical and non technical subjects related to home and property inspection
- Service to a provincial association of home and property inspectors
- Occasional test inspections with peer review

Grand-parenting

'Grand-parenting' or 'Grand-fathering' is an optional element of some certification programs. Where Grand-parenting is used, individuals who are already practicing their trade might be made 'Associates' or 'Certified' or granted some other designation by a certification body based on experience or history alone.

Due to the comprehensive nature of the certification process, the CHIBO Working Committee decided that the national certification program for HPI occupation needed to be rigorous and defensible. As a result, the Working Committee determined that the national certification program for HPIs will not include a grand-parenting or grand-fathering component. Instead, any individual who is interested in becoming part of the national certification program would present their personal background to the National Certification Council for background review. The National Certification Council would make a decision on whether to place the individual within the national certification program, and if so at what stage.

Provincial Certification

It is important to note that National Certification and Provincial Certification are two different things.

Provincial associations of home and property inspectors exist in most provinces. However, the two stages of the national certification program - 'Candidate' and 'National Certificate Holder' - may or may not be linked to existing provincial certification programs.

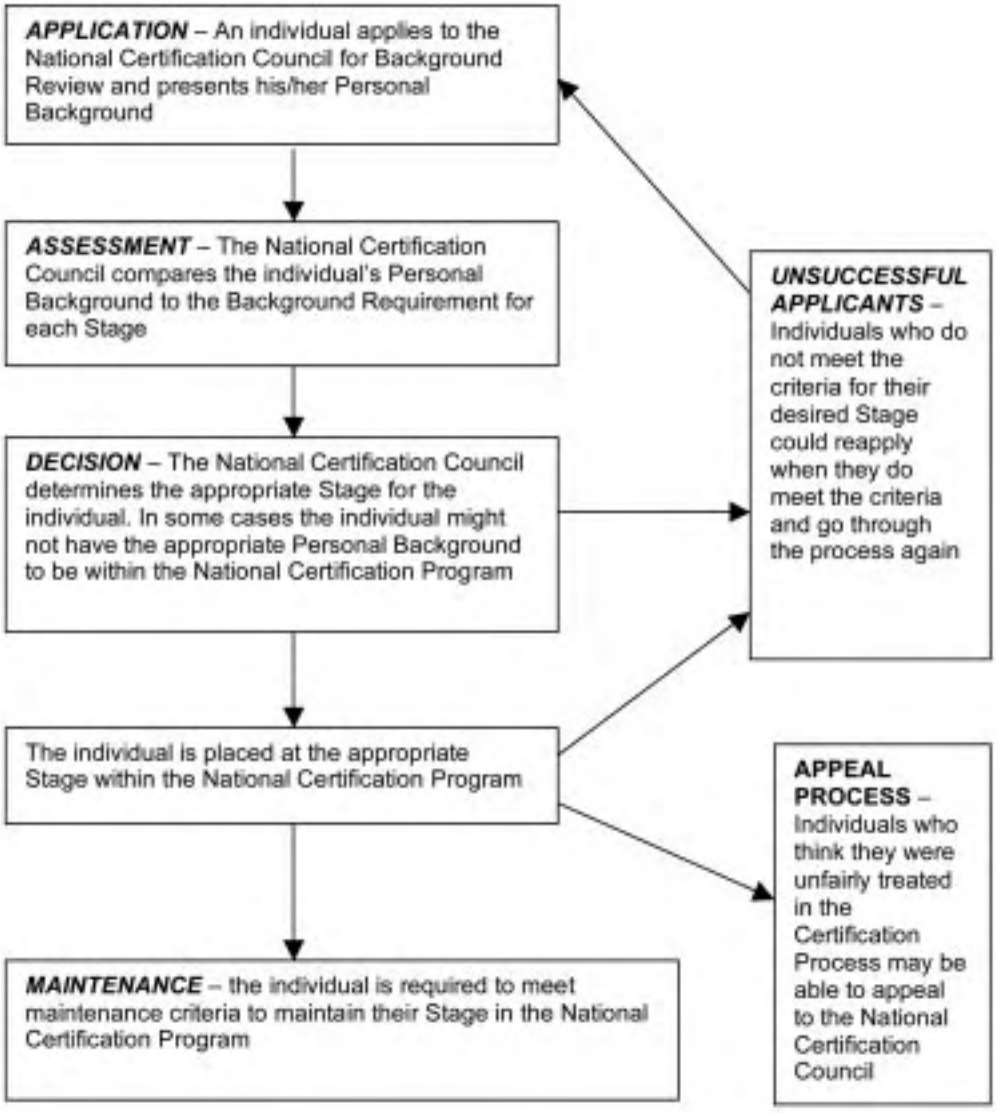
Provincial associations are free to set standards for provincial certification at any competence level they choose – either higher or the same as the competence levels required to become a 'Candidate' or 'National Certificate Holder' within the national certification program.

Special Note on Liability and Certification Committees

National Certification Bodies (and/or National Certification Councils) that determine the appropriate stage for individuals *MAY* be held liable in some circumstances for the competence of that individual. The National Certification Body for home and property inspectors (CAHPI) should obtain a legal opinion on this issue, and procure appropriate insurance should it be required.

CAHPI National Certification Process

The certification process outlines the activities which the certification council will undertake in determining if an individual meets the specified competence requirements as defined by the certification scheme, including application, evaluation, decision on certification, surveillance and recertification, use of certificates and logos/marks. The flow chart below graphically illustrates the certification process for an individual wishing to be nationally certified as a home and property inspectors.



The 'Candidate' Stage

Individuals who are not 'Candidates' or 'National Certificate Holders' are not part of the National Certification Program, and have no status in the National Certification Program. Such individuals may or may not be members of a provincial association of home and property inspectors.

'Candidate' is the entry point into the National Certification Program.

In this section, individuals at this Stage in the National Certification Program are called 'Candidates'.

Purpose

The 'Candidate' stage acts as an entry point for individuals who have received training as home and property inspectors into the National Certification Program. The 'Candidate" stage also provides the national certification body (CAHPI) with a mechanism to oversee the activities of individuals who are already working in or interested in working in the home and property inspection occupation.

Mentoring Entitlement

Individuals who have entered into the national certification program as 'Candidates' would benefit from assistance or guidance in working through the certification program. The CHIBO Working Committee recommended the participation of 'National Certificate Holders', to act as mentors. This is not a requirement at this time, and is something that may be explored in at a later date.

General Background for a 'Candidate'

General background consists of all the courses and programs taken and completed by individuals in their lives AND their general work experience. The *IDEAL* background for home and property inspectors would include:

- **High School Diploma (or equivalent)**
- **Two years of practical experience in Residential Construction or Renovation**

...and one or more of the following:

- Completion of a diploma or degree program in a building science (e.g. architecture, construction technology, relevant engineering or engineering technology, home inspection programs, etc.)
- Journeyperson provincial or red seal trade ticket in a construction trade
- Ten years work experience in residential construction or renovation, or equivalent work experience

This general background provides individuals with the threshold knowledge and abilities necessary to learn the required technical skills of the Home and Property Inspection occupation.

While this background is considered ideal for home and property inspectors, it is NOT a requirement for participation in the National Certification Program at this time.

Technical Training Requirement for 'Candidates'

The National Occupational Standard (NOS) for home and property inspectors requires practitioners to be skilled in diagnosing the condition of buildings based on a visual inspection. The work has a forensic nature, in that visible clues are used to determine the condition of a building and its systems, as well as determining the possible causes of problems or discrepancies. This work requires that an individual have a sound education in building science (as recommended in general background), as well as training pertaining to inspection and diagnostic techniques.

To ensure that individuals wishing to enter national certification program at the 'Candidate' stage had sufficient technical training, the CHIBO Working Committee included a training requirement. Prior to becoming a 'Candidate', an individual must complete a number of courses specific to the home and property inspection occupation:

- Complete a minimum of 200 hours of training courses covering *ALL* aspects of home and property inspection from an accredited training institution. The courses should cover all elements of the National Occupational Standard as developed for home and property inspectors
- Complete a minimum of 50 hours of practical field training (in addition to the training courses mentioned in the previous point) covering all elements of Home and Property Inspection, including supervised 'practice' home inspections. The courses may include a minimum of 50 hours of field training covering all aspects of Home and Property Inspection
- Training courses must be accredited by the National Certification Council
- All training courses must include an exam, which must be passed

Prior to becoming a 'Candidate', an individual must also complete and pass one test inspection with peer review.

Test Inspection with Peer Review

The 'test inspection with peer review' is a method for verifying the competence of a home and property inspector. A test inspection consists of the following steps:

- *The individual undergoing test inspection inspects a house with known defects*
- *The individual prepares a Written Report and makes a Verbal Presentation on noted defects to a panel of 'National Certificate Holder' home and property inspectors*
- *The panel evaluates and grades the report and presentation for compliance with standards of practice, competencies as defined in the NOS, and code of ethics*

Ethics and Professional Standard Requirements for a 'Candidate'

Individuals who apply to become a 'Candidate' within the national certification program would be required to sign an undertaking to uphold the CAHPI code of ethics and standards of practice.

The Background Review Process for a 'Candidate'

Individuals interested in becoming 'Candidates' would complete an application for background review. This application would include detailed information on how the individual meets the background requirements for the 'Candidate' stage in the National Certification Program.

Proposed Fees for 'Candidate' Background Review

For individuals interested in becoming a 'Candidate', the background review process should be straight forward. When the fee is implemented, it is recommended the 'Candidate' background review fee be kept relatively low. A fee structure will be implemented and will be determined by the National Certification Council.

Rights and Responsibilities of 'Candidates'

As a result of entering into the National Certification Program and becoming a candidate, certain rights and responsibilities are assigned to the individual. These rights and responsibilities are described below:

- Candidates are permitted to perform paid home and property inspections
- Candidates must uphold the CAHPI Code of Ethics and Standards of Practice
- Candidates would be subject to disciplinary proceedings if they violated the Code of Ethics or Standards of Practice

Maintenance Requirements for 'Candidates'

In order to maintain their 'Candidate' status, 'Candidates' who have not become 'National Certificate Holders' within three (3) years must reapply to the National Certification Council to retain their 'Candidate' status.

The 'National Certificate Holder' Stage

The 'National Certificate Holder' is the highest stage in the National Certification Program. In order to become 'National Certificate Holder', an individual must meet the requirements for individuals at this stage as defined in the certification program.

Purpose

For individuals who are actively practicing as home and property inspectors.

Practical and Technical Experience Requirement for 'National Certificate Holders'

A practitioner who is a 'National Certificate Holder' should have sufficient technical education, training and experience to be competent. The technical experience requirement for home and property inspectors could be measured in four ways:

- Duration – the total length of time working as a home and property inspector
- Quantity – the total number of home and property inspections performed in a career
- Frequency – the total number of home and property inspections performed in the last year
- Quality – confirmation that home and property inspections meet NOS and/or standard of practice criteria

Individual's wanting to become 'National Certificate Holders' must have the following practical experience:

- Perform inspections as a 'Candidate' for a minimum of *ONE* year. Home and property inspectors who have practiced for more than one year (but not while holding 'Candidate' status) may be exempt from this requirement
- Perform a minimum of 150 paid Home and Property Inspections as a 'Candidate', or a minimum of 150 paid inspections using an inspection system that complies with a national Standard of Practice
- Complete and pass a minimum of two test inspections with peer review. Test inspections with peer review must be at least three months apart

Test Inspection with Peer Review

The 'test inspection with peer review' is a method for verifying the competence of a home and property inspector. A test inspection consists of the following steps:

- *The individual undergoing test inspection inspects a house with known defects*
- *The individual prepares a Written Report and makes a Verbal Presentation on noted defects to a panel of 'National Certificate Holder' home and property inspectors*
- *The panel evaluates and grades the report and presentation for compliance with standards of practice, competencies as defined in the NOS, and code of ethics*

These requirements will ensure that individuals who are 'National Certificate Holders' have demonstrated the knowledge and ability to apply all aspects of the NOS for home and property inspectors as well as the CAHPI standard of practice for home inspection.

Ethics and Professional Standard Requirements for a 'National Certificate Holder'

Individuals who apply to the National Certification Council to become a 'National Certificate Holder' within the National Certification Program will be required to sign an undertaking to uphold the CAHPI code of ethics and CAHPI standards of practice.

The Background Review process for a 'National Certificate Holder'

Individuals interested in becoming a 'National Certificate Holder' would complete an application for background review. This application would include detailed information on how the individual meets the background requirements for the 'National Certificate Holder' stage in the National Certification Program.

Proposed Fees for 'National Certificate Holder' Background Review

For individuals interested in becoming a 'National Certificate Holder' the background review process should be straight forward. A fee structure will be implemented and will be determined by the National Certification Council.

Maintenance Requirements for 'National Certificate Holders'

In order to maintain 'National Certificate Holder' status, individuals must complete a minimum of 20 hours each year doing any of the following:

- Technical courses or workshops directly related to home and property inspection
- Legal, ethics, business practices, communication, conflict resolution, or similar courses
- Service to the National Certification Body, or an association that is affiliated with the national certification body

Individuals must also complete a test inspection with peer review every fifth year.

Individuals who are within the National Certification Program *MAY* or *MAY NOT* be members of a CAHPI Provincial Association. Provincial Association membership is not a requirement of entry into the National Certification Program.

Rationale: It is not appropriate to require individuals who are within the National Certification Program to be members of a CAHPI provincial association, because this requirement would give a provincial association the power to determine whether or not an individual should be within the National Certification Program. This power must remain with the National Certification Council.

National Accreditation Model for Home and Property Inspectors – The Accreditation Process

Accreditation is the process a certification body uses to determine whether the courses or programs offered by a training provider meet some or all of the skill and knowledge requirements of a NOS. It also involves an assessment of a provider's ability to provide a consistent standard of training.

For home and property inspectors, National Accreditation will be the responsibility of CAHPI, who will delegate this accreditation process to a national accreditation committee.

The steps in accreditation are:

1. Establishing the *bona fides* of the training provider
2. Gathering information regarding specific courses or programs provided
3. Determining skill and/or knowledge levels delivered in the program
4. Mapping course or program topics to the requirements of the NOS
5. Determining the degree of compliance with the elements of the NOS
6. Auditing courses or programs
7. Reviewing program participants for satisfaction and competency

It is also necessary to review the occupational standard for indications of the degree of competency required for each listed task in order to allow comparison with course/program learning objectives (Step 5).

1. Establishing the Bona Fides of a Training Provider

The first step ensures that the National Accreditation Committee (and the National Certification Body) maintains credibility by *NOT* granting accreditation to 'fly-by-night' operators. It is important that the accreditation (which is in effect the certification body's seal of approval for a training provider) only be granted to legitimate training providers who meet certain eligibility criteria.

At a minimum, training providers must demonstrate that they are legitimate, can demonstrate adequate processes for maintaining instructional standards, and maintain adequate processes for verifying the competence of trainees.

Verification of Legitimacy

The test of legitimacy ensures that the training provider seeking accreditation is a legitimate entity. For any course or program being considered for accreditation, it is necessary to determine whether or not the provider:

- is a legal entity registered within its jurisdiction
- has been in operation a minimum of three years, and
- is financially solvent, and likely to remain so

The first criterion is easy to establish - the training provider will have a business number or other registration, which can be traced through the jurisdiction that granted it. It is also prudent for certifying bodies to conduct a background check through the local chamber of commerce, better business bureau or other organization.

The second criterion is somewhat harder to establish, but again, if the entity is registered the information is available through the registering agency.

The third criterion requires a credit check. These can be done (for a fee), and normally the permission of the entity being checked is required. This last check is important where doubts exist as to the viability of a training provider. The criterion to submit to a credit check will often act as a disincentive to questionable practitioners.

In many cases, the test of legitimacy may already have been accomplished by another agency. A good example is a training provider that is accredited by a provincial education ministry as a post-secondary or vocational school. This would constitute *prima facie* evidence of legitimacy. All chartered Canadian universities, community colleges and technical institutes fall into this category, as do many private training providers who have proven to a provincial authority that they are legitimate centers of learning.

International colleges and technical schools are a bit trickier. Some have received accreditation from government departments (particularly in the USA) whose processes are rigorous and well documented, and these institutes may also be deemed as having passed the test of legitimacy. Accrediting bodies whose standards may be considered as the equivalent of a Canadian charter include the Accrediting Commission of Career Schools and Colleges of Technology (ACCST), and the Accrediting Council for Continuing Education and Training (ACCET).

There are other international accreditation agencies, many of which are serious, legitimate and rigorous in their processes. Wherever a claim to accreditation is made, the national accreditation committee must undertake due diligence to verify that the claimant is in fact accredited, and also that the process of accreditation meets the standards of the test of legitimacy.

Verification of Instructional Standards

As part of the verification process, training providers seeking accreditation must provide details of their process for establishing and maintaining instructional standards:

- How they determine the standards required for teaching
- What processes they have in place internally to ensure these standards are being met

Where a training provider has a formal instructional standards program in place, it will be necessary to determine when the course/program under consideration was last audited, and what the findings of the audit were.

Again, Canadian chartered training providers and institutions may be deemed to have passed this test. International training providers with adequate standing in their respective jurisdictions MAY pass this test. Note that it may be difficult to determine the standing of private, non-chartered training providers under this criterion without conducting an on-site audit, which adds to the complexity and expense of the accreditation process.

Verification of Trainee Evaluation

It is necessary to determine the mechanism(s) that a training provider uses to verify the competence of trainees. Accreditation cannot be granted to a course or program where no means of testing competence or confirming learning is in place. This would eliminate many seminar and workshop type courses from consideration unless there is a testing component built in.

Canadian chartered training providers and institutions can be considered as having passed this test for courses or programs offered as part of a recognized post-secondary curriculum. For adult education courses that are not part of a recognized program or curriculum, it will be necessary to verify the type and quantity of testing that occurs. Once again, private, non-chartered training providers present the greatest difficulty in verifying this criterion.

Recommendations:

- Canadian chartered institutions should be deemed to have passed the test of legitimacy for courses or programs that are part of a recognized post-secondary curriculum
- International training providers should not be considered at this time due to the cost and complexity of verifying standards. Once the certification and accreditation programs are implemented and have been running for a period of 3 to 5 years, the national accreditation committee may begin to consider international training providers
- Caution should be exercised in verifying private, non-chartered training providers. This verification should be conducted on a case-by-case basis and only where sufficient information exists to indicate that the organization will have a reasonable chance of passing the test of legitimacy

2. Gathering of Information Regarding Specific Courses or Programs Provided

The National Accreditation Committee will have to gather information about the learning objectives of courses and programs. The information can be provided by the training provider as part of a submission of accreditation, or gathered by the organization independent of the institution.

A draft form for recording this information can be found in Appendix C to this report.

3. Mapping of Course/Program Topics to the National Occupational Standard

Courses and programs must be mapped or linked to specific tasks in the NOS. The linkages may be apparent - for example, a program may have an obvious link to an NOS element, and this may be apparent in the name of the course ("Visual Inspection of Concrete Foundations").

In other cases the link may be a bit more tenuous - for example, a course may require a trainee submit a written or verbal report (part of testing) that may satisfy a requirement under an administrative component of the NOS.

Course mapping is conducted using a standard form. A draft copy of the form can be found in the Appendices to this report.

Recommendation:

- A review of this type should be conducted by two or more individuals and the results compared to ensure that all elements are correctly mapped

4. Determination of Skill and/or Knowledge Levels Delivered by a Course or Program

As part of this project, the tasks defined in the NOS for HPIs underwent taxonomic analysis. All NOS tasks have been evaluated at an Application level of 3, and a Knowledge level of 2.

Elements of a course or program that map to specific elements of the NOS were analyzed to define the level of skill and/or knowledge acquired by successful trainees. Skill and knowledge levels were determined by analyzing the wording of learning objectives for course modules.

The complete procedure for performing this Taxonomic Analysis is included in the Appendices to this report. Note that taxonomic analysis will only determine what level of skill or knowledge has been designed into a program – only an audit can determine whether these levels are actually delivered.

5. Determination of the Degree of Compliance with the the National Occupational Standard

To address Step 5, a comparison is made between the required skill and knowledge level of the NOS and the design levels of a course or program. Once analysis is complete, the reviewer could make a statement like:

- "The course is designed to meet the skill and knowledge requirements for Task 18 of the NOS"

OR

- "The course is designed to meet the knowledge components of the NOS, additional training and/or experience would be required to fully meet the skill requirements of the NOS"

It is unlikely that a course or program will deliver the required application elements. Accreditation should be considered as a means of determining which courses or programs provide adequate knowledge, and move a candidate closer to the required skill level. Candidate skills are better evaluated through the practical experience requirements of the national certification scheme.

6. Audit of Course or Program

It is important to establish a process for auditing a course or program to verify that it delivers in accordance with its design goals.

In addition, the national accreditation committee should establish an audit procedure for verifying courses or programs on a random basis as a quality control mechanism, as well as performing an audit in circumstances where the committee has reason to believe that there may be a problem with maintaining the standard of accreditation. Such circumstances could include complaints from trainees or the public, or the discovery of competency gaps in graduates of a course or program.

Audit may also consist of a review of average marks of trainees enrolled in the program, number of successful graduates versus the total number of enrollees, etc. A draft format and checklist for conducting an audit is included in the Appendices to this report.

Recommendations:

- Periodic audit of programs should be a prerequisite for granting and maintaining accreditation
- All accredited programs should be reviewed on a periodic basis to ensure they are still in compliance with the criteria for accreditation. At a minimum, this review should occur following any change to the NOS

7. Review of Program Participants

The last element of accreditation is a review of program participants, including current trainees and recent graduates. This can be accomplished through a survey tool administered after completion of a course to determine both the trainees' level of satisfaction with the training course or program, and the degree to which they believe the training is meeting their needs.

While it is true that such an evaluation is subjective, it does provide valuable information and points to trends and areas where further investigation may be required.

Implementation - Infrastructure Required to Support National Certification and Accreditation

Roles and Responsibilities

Assumption – a complete breakdown of responsibilities and authorities between the CAHPI and provincial affiliated organizations will be negotiated as part of a formal affiliation or teaming agreement.

In order to implement and administer a viable national certification and accreditation model, a number of roles would need to be established. These include:

- National Certification Body (CAHPI)
- National Certification Council
- National Registrar
- National Accreditation Committee

National Certification Body

CAHPI will act as the National Certification Body for home and property inspectors. CAHPI has declared it will take the steps necessary to comply with CAN-P-9 criteria.

Note: CAN-P-9 certification is outside the scope and is not part of this project.

National Certification Council

The National Certification Body (CAHPI) would delegate 'Authority to Assess and Recommend' to a National Certification Council. It will be the responsibility of the National Certification Council to undertake certification assessments and make recommendations to the National Certification Body as to what stage an individual fits within the national certification model.

CAN-P-9 criteria do not allow decisions on certification to be subcontracted. However, other organizations could provide the National Certification Council with recommendations as to whether specific individuals meet the background requirements of the National Certification Program.

Certain elements of the National Certification Model developed by the CHIBO Working Committee would be difficult for a National Certification Council to administer. Therefore, this model assumes that associations at the provincial level will be involved in the National Certification Program and will provide

recommendations on certification to the National Certification Council. **Note that certain elements could be outsourced as long as the final decision to certify rest with the certification body. Guidance on outsourcing is included in Appendix F**

National Certification Council Members

The composition of the National Certification Council was not determined during the course of this initiative. However, during the course of this project, the CHIBO Working Group determined that the National Certification Council for the HPI occupation should include individuals from other organizations such as REIC, ACBOA, banks, insurers, non-CAHPI Home Inspectors, etc. Based on the preliminary discussions of the Working Committee, the Working Committee is proposing that the National Certification Council consist of the following:

- *A maximum of one Home & Property Inspector representative from each provincial association*: The representative would be a 'National Certificate Holder', and would be appointed for a fixed term (3 years is a standard length in other organizations). Back-up or alternate candidates could also be designated to ensure continuity and attend council meetings in the absence of the representative. Representatives would normally serve at most two consecutive terms, unless otherwise agreed upon. In the interests of continuity, staggered terms or other adjustments to the timing of National Certification Council appointments may be necessary.
- *A Council Chair*: For continuity, the term of the Chair would normally be the same as the term of a provincial representative, with an individual normally limited to two consecutive terms. The Chair may not also represent a specific province. The Chair would be selected by the members of the National Certification Council
- A minimum of three other individuals from outside of the sector as deemed appropriate by CAHPI such as members from REIC, ACBOA, Banks, Insurers, non-CAHPI Home Inspectors, etc.

Meetings of the National Certification Council

The National Certification Council would meet on a regular basis (at least twice per calendar year is recommended), with other meetings as may be designated from time to time. Work of the council will continue between such meetings through the work of sub committees and task groups who can communicate in other ways (e.g. e-mail, writing, phone calls) with both the council and the associations to expedite particular issues as designated by the council and report on such actions at subsequent meetings.

National Registrar

The National Certification Body (CAHPI) should have a National Registrar to keep track of the status of individuals who are part of the National Certification Program.

National Accreditation Committee

The National Certification Body (CAHPI) would delegate accreditation to a National Accreditation Committee. The National Accreditation Committee will be responsible for reviewing and granting accreditation to training providers for their courses or programs, and would act as the single point of contact for organizations seeking accreditation.

The National Accreditation Committee will be responsible for reviewing and granting accreditation to training providers for their courses or programs, and would act as the single point of contact for organizations seeking accreditation.

The National Accreditation Committee activity would center on the seven steps of accreditation:

1. Establishing the *bona fides* of the training provider
2. Gathering information regarding specific courses or programs provided
3. Determining skill and/or knowledge levels delivered in the program
4. Mapping course or program topics to the requirements of the NOS
5. Determining the degree of compliance with the elements of the NOS
6. Auditing courses or programs
7. Reviewing program participants for satisfaction and competency

While some elements of the national certification program can be administered by provincial or regional associations, accreditation should be handled centrally by the National Accreditation Committee. At a minimum, the responsibility for performing accreditation reviews at the request of a particular training provider should be national. This gives training providers a single point of entry into the national certification program.

Maintenance of an Accreditation Database

As shown above, a number of different agencies and organizations may be involved in conducting accreditation reviews. In order to avoid duplication of effort, a central repository of information on accredited courses/programs must be established. Periodic updates to this database (at least annually) will be required. Each provincial certification body should have access to the database.

This report includes a database populated with accreditation data on a number of courses and programs from a number of training providers. The information was gathered as part of this project, and could be used as a starting point for a national accreditation database.

Fees for Accreditation

It is customary to charge an accreditation fee to institutions and training providers who seek accreditation. The fee is a reflection of the time and effort required to adequately determine whether a course or program

meets the needs of the certification program. The logic is that accreditation provides a marketing advantage to organizations that achieve it; that is, they will be able to attract more students/trainees (or charge higher rates) if they can show that their product is accepted as part of the National Certification Program for an occupation. In the short term it is not practical to charge for accreditation, since there is currently no National Certification Program in place.

Once the National Certification Program is launched, it will be necessary to market the program to training providers. The success of a "for fee" accreditation will hinge on the overall marketing of the national certification. If national certification becomes mandatory (either through regulation or through market forces) then individuals who seek certification must first seek out accredited training providers.

Recommendation:

- As an interim measure, CAHPI could partner with one or more training providers to develop a complete, accredited training program for the occupation. Subsequent programs can then be measured against this standard, and a fee charged for the analysis.

Costs of a National Certification Program for Home and Property Inspectors

The cost of operating the National Certification Program must be considered. Cost is difficult to determine, but the following elements will ensure the National Certification Program will be viable:

- Volunteer certification and accreditation councils made up of 'National Certificate Holders', and other individuals from outside the home and property inspection occupation
- Structured use of background review, where the National Certification Council (and/or provincial organizations that make recommendations to the National Certification Council) use a checklist approach to compare personal background to background requirements
- Use of computer based tools and records/data/examination/administration to quickly establish whether or not an individual's general education, technical education, and technical training meets the requirements of the NOS
- An emphasis on individual applicants 'making their case' for acceptance into the National Certification Program (at either stage). Individuals will do the majority of the work in assembling their personal background information for background review by the National Certification Council

Even with volunteers, there will be costs associated with running a National Certification Program. These costs must be borne by the individuals who apply for a change to their certification status and possibly by provincial associations.

In order to become a 'National Certificate Holder', an individual must demonstrate, through a combination of training, experience and verification that they are competent in all tasks in the NOS for the home and property inspection occupation.

To provide a set of guidelines for verifying compliance, another section of this report maps each of the elements of the NOS to an appropriate primary and secondary verification method, as well as a cursory indication of where training may be obtained to meet the standards. This is then fully developed into a checklist for conducting the background review and determining the appropriate stage for an individual within the National Certification Program.

Implementation – Other Issues to Consider

Comments on the Situation and Potential Barriers to Implementation

One thousand or more home and property inspectors will need to undergo background review in order to be properly placed within the National Certification Program. Ideally this mass placement should happen within a relatively short period of time.

There are many policies and committees that will have to be created to make the National Certification Body compliant with CAN-P-9 criteria. Assuming each individual who applies for background review will require a minimum if 20 to 30 minutes of review time by the National Certification Council, approximately 500 hours of council review time will be required to properly place 1000 individuals. It is unlikely that volunteers serving on the National Certification Council will be willing or able to provide the required time.

The recommended range for the background review fee has yet to be determined. However, individuals applying for entry into a new National Certification Program may be reluctant to pay this fee. This reluctance may be greater where the individual is already a member of a provincial association. Once the National Certification Program is widely known and accepted, new applicants are more likely to be willing to pay the fee.

In order to reflect the significant financial and in-kind contributions made by CAHPI and its provincial members and volunteers, some fees could be different for members and non-members.

Implementation – Possible Time Frame

A possible timeline for implementation of this model. Additional points to be considered on the road to implementation are included in the HPI Strategic Framework found in Appendix E of this report.

The First Six Months

- The project report is distributed to interested parties in all provinces and jurisdictions by CAHPI. CAHPI decides on background review fees during an introductory period that lasts for at least a year.
- The CAHPI national registrar develops databases capable of compiling detailed information on each individual who is within the National Certification Program.
- CAHPI will develop alliances with associations and organizations with a stake in the home and property inspection occupation to raise awareness amongst individual home and property inspectors practicing in Canada – including members of CAHPI, non member practitioners, and other interested parties.

Months Six to Twelve

- Hold informational meetings in all provinces. The meetings include all possible home and property inspection associations and groups.
- Explain the benefits of national certification and answer questions.
- Distribute background review applications – printed and electronic form.
- Invite all interested, qualified individuals to complete the application.
- Pilot the background review process using the applications that have been received. At first background review should only be performed by individuals with a deep understanding of the certification program in a pilot process. The pilot process would also test the integrity of the national certification program database.

Months Twelve to Eighteen

- As background review progresses, those individuals who are accepted into the program are notified and their background information is entered into the database. Certificates are distributed.
- Individuals who are not accepted into the program receive a letter explaining what deficiencies have to be corrected before they will be accepted.
- CAHPI continues to develop alliances with provincial associations and other organizations, and continues to promote the National Certification Program in every way they can, encouraging qualified practitioners to apply for background review.
- By the end of the period, the majority of background review applications should be received and processed, and qualified individuals are part of the National Certification Program.
- Provincial associations and organizations across Canada receive workshops on how to conduct the background review process – they would then begin conducting background reviews and making recommendations to the National Certification Council.

Glossary of Terms

Accreditation

- Accreditation is the process a certifying body uses to determine whether the courses or programs offered by a training provider meet some or all of the skill and knowledge requirements of a National Occupational Standard. It also involves an assessment of a provider's ability to provide a consistent standard of training.
- See 'National Accreditation Council'

Appeal

- A request by an individual for reconsideration of any decision made by a Certification Council
- *CAN-P-9 definition: Request by applicant, candidate, or certified person for reconsideration of any adverse decision made by the certification body related to his/her desired certification status*

Candidate

- A stage in the National Certification Program for Home and Property Inspectors
- In order to become a Candidate, an individual must meet the requirements of the Certification Program
- *CAN-P-9 definition: Applicant who has fulfilled specified pre-requisites, allowing his/her participation in the certification process*

Association Membership

- Individual or organizational membership in a provincial or national association that represents an occupation
- Association membership often carries obligations such as required compliance with a Code of Conduct or Code of Ethics

Authority to Certify

- The authority or right to certify individuals as competent to practice or work within an occupation or profession
- Authority to certify may be provincial, national, or international.
- In the case of a national certification, authority to certify would have to be national
- However, national certification may not be recognized as valid within a province or sufficient to practice or work within a province
- Authority to certify may be granted through legislation, or simply assumed by a national organization
- The authority to certify home and property inspectors will be held by CAHPI which can delegate or transfer parts of this authority as the need arises
- More than one type of national certification for an occupation or profession may exist

Background Requirement

- A combination of personal background, education, and experience relevant to the occupation that is required for an individual to be part of a National Certification Program
- The background requirement for home and property inspectors should be linked to the tasks that make up the NOS for home and property inspectors
- Specific background requirements for the 'Stages' in the certification program are defined in the certification process

Background Review

- The process that a Certification Council uses to determine whether or not an individual should be part of a certification program, and if so, the appropriate stage within the Certification Program as defined in the Certification Process
- Background review compares an individual's personal background to the background requirements for the defined 'Stages' within the certification program

Board of Examiners

- See 'Certification Council'

Building Science

- Related to construction, architecture, engineering technology, or engineering

CAHPI (Canadian Association of Home and Property Inspectors)

- A national association which represents the home and property inspection occupation
- Members of CAHPI consist of provincial home and property inspection associations
- Individuals are associated with CAHPI through membership in a CAHPI provincial association

CAHPI Code of Ethics

- The ethical commitment that an individual must make in order to be a member of a CAHPI provincial association
- The ethical commitment that an individual must make in order to participate in certification program

CAHPI Logo

- A national symbol that identifies CAHPI
- The logo should be a registered trademark with restrictions on use imposed by CAHPI
- Rights to use the logo can be granted to CAHPI provincial associations

CAHPI Provincial Association

- An association of home and property inspectors that is a member of CAHPI
- In some cases a provincial association may have jurisdiction in more than one province

CAHPI Standards of Practice

- The CAHPI approved criteria for conducting home and property inspections
- Defines what home and property inspectors who are members of CAHPI provincial associations do... and what they do NOT do

CAN-P-9

- An International Standard endorsed by the Standards Council of Canada which defines 'Criteria for Accreditation of Personnel Certification Bodies'
- The standards are based on ISO/IEC 17024:2003

Certificate of Competence

- A printed confirmation of Certification that is provided to an individual by a certification body
- Certificates of Competence remain the property of the certification body

Certification

- See 'Certification Process'
- See 'Certification Program'

Certification Body

- An association or organization that oversees a certification program and/or a certification process
- See 'National Certification Body'

Certification Council

- A group of individuals who are empowered to determine whether or not an individual's personal background meets the background requirements defined in the certification program, and if so, the stage that the individual has achieved
- See 'National Certification Council'

Certification Process

- All activities by which a Certification Council establishes that an individual meets specified competence requirements defined within a Certification Program, including application, evaluation, decision on certification, surveillance and recertification, use of certificates and logos/marks
- *CAN-P-9 definition: All activities by which a certification body establishes that a person meets specified competence requirements, including application, evaluation, decision on certification, surveillance and recertification, use of certificates and logos/marks*

Certification Program

- The program that oversees all aspects of certification
- See 'National Certification Program'

Certification System

- See 'Certification Process'
- *CAN-P-9 definition: Set of procedures and resources for carrying out the certification process as per a certification scheme, leading to the issue of a certificate of competence including maintenance*

Code of Conduct

- The ethical commitment that an individual must make in order to be a member in good standing of an association or a certification program
- See 'Code of Ethics'

Code of Ethics

- The ethical commitment that an individual must make in order to be a member in good standing of an association or a certification program
- CAHPI has developed a code of ethics for home and property inspectors
- See 'Code of Conduct'

Competence

- See 'Personal Background'
- *CAN-P-9 definition: Demonstrated ability to apply knowledge and/or skills, and where relevant, demonstrated personal attributes, as defined in the certification scheme*

Complaint

- Concerns raised by members of the public or by another practitioner regarding the conduct of an individual who is part of a Certification Program
- *CAN-P-9 definition: conformity assessment request, other than an appeal, by any organization or individual to a certification body, for corrective action relating to the activities of that body or to those of any of its customers*

Credentials

- See 'Personal Background'

Disciplinary Process

- A process used by a Certification Body and/or a Certification Council to deal with complaints against individuals who within the Certification Program

Ethics & Professional Standards

- This element of a certification scheme and/or certification program is intended to provide the public with assurance that certified individuals will abide by a set of rules and be governed by standards of practice that are enforceable
- Normally these standards are upheld by requiring individuals who are part of a Certification Program to comply with a code of ethics or code of conduct

Evaluation

- See 'Background Review'
- *CAN-P-9 definition: Process that assesses a person's fulfillment of the requirements of the scheme, leading to a decision on certification*

Examination

- A mechanism which measures an individual's competence by one or more means. Means could include written, oral, practical and/or through observation. Examination is normally part of a background review process
- Examinations should test for knowledge and demonstrated ability to perform the tasks defined in the NOS
- *CAN-P-9 definition: Mechanism that is part of the evaluation, which measures a candidate's competence by one or more means such as written, oral, practical and observational*

Examiner

- An individual with relevant technical and personal qualifications, competent to conduct and/or score an examination
- *CAN-P-9 definition: Person with relevant technical and personal qualifications, competent to conduct and/or score an examination*

FNBO (First Nations Building Officer)

- An occupation defined by a NOS
- The occupation includes some Tasks that are part of the PBO and HPI occupations
- As a rule, the work performed by FNBOs takes place on First Nations land in Canada

General Background

- All the courses and programs taken and completed by an individual in their lifetime, and their general work experience in all occupations
- General background is not necessarily directly related to a specific occupation

Good Standing

- A member of an association may be in 'good standing' when they:
    - Are current with association dues and/or membership fees
    - Conform to the association code of conduct or code of ethics
    - Are in compliance with other membership requirements, such as meeting attendance
    - Are not under the disciplinary process
- 'Good Standing' is normally part of the membership requirement of an association

Grand Fathering

- An optional element of a certification process where individuals who are practicing within an occupation become part of the certification program based on their experience, without further background review

Grand Parenting

- See 'Grand Fathering'

Home and Property Inspector (HPI)

- An occupation defined by a NOS
- Home and property inspectors conduct visual inspections of new and existing buildings and properties to assess the condition of the building or property. Based on the inspection, they provide observations, opinions and recommendations to their customers

Jurisdiction

- Examples of jurisdictions include municipalities, towns, cities, counties, and provinces

Levels of Certification

- See 'Stages'

Maintenance Requirement

- Activities that must be completed in order for an individual to remain within the certification program
- Requirements may be different depending on the individual's stage within the certification program
- Maintenance activities may include continued industry involvement, courses, continued professional development, association membership, meeting attendance, etc.
- Maintenance requirements are defined in the certification program

Member

- An individual or organization who is a member in good standing of an association

Mentor

- An individual who helps other individuals to advance within a certification program

Municipality

- See 'Jurisdiction'

National Accreditation Committee

- A committee within a National Certification Body
- The Committee is responsible for reviewing training companies and institutions and their course and program offerings to determine whether they are appropriate for inclusion in the certification program. Where the institutions and programs are appropriate, they are accredited by the Accreditation Committee

National Certificate Holder (NCH)

- A stage in the National Certification Program for Home and Property Inspectors
- In order to become a 'National Certificate Holder', an individual must meet the requirements for individuals at this stage as defined in the certification program

National Certification Body

- The association or organization that oversees a National Certification Program and/or process, including accreditation of programs that are part of the certification program

National Certification Council

- A committee within a National Certification Body that oversees a National Certification Program
- A National Certification Council has the authority to determine whether an individual should be within a National Certification Program, and at what stage within the National Certification Program
- See 'Certification Council'

National Certification Program

- A program that oversees all aspects of National Certification and Accreditation for an occupation or profession

- In the case of home and property inspectors, 'Candidate' individuals and 'National Certificate Holder' individuals are within the National Certification Program
- See 'Certification Program'

National Occupational Standard (NOS)

- A document that defines the Blocks, Task, and Sub-tasks that define a specific occupation.
- These blocks, tasks, and sub-tasks should be understood and applied by competent individuals working in the occupation
- The NOS is the basis for determining the background requirement within a certification program

National Registrar

- An individual or organization that is responsible for keeping track of all individuals who are within a National Certification Program
- The National Registrar is normally closely affiliated with the National Certification Body

Occupation

- A series of tasks that have been organized and defined into a NOS

Personal Background

- An individual's combination of personal attributes education, training and/or work experience
- This includes general background AND technical training and experience specific to an occupation
- The individual may be required to demonstrate their ability to apply knowledge and/or skills and, where relevant, demonstrate personal attributes

Practice

- Working within an occupation for pay or some other consideration

Practitioner

- An individual who works within an occupation for pay or some other consideration

Professional Building Official (PBO)

- An occupation defined by a NOS
- Professional Building Officials conduct inspections and review plans for buildings under construction to ensure compliance with National or Provincial Building Code
- Professional Building Officials are 'appointed' by a jurisdiction to enforce Building Code compliance

Provincial

- Pertaining to a province of Canada
- In this report, this term is also used to define a territory of Canada
- See 'Jurisdiction'

Provincial Certification Council and/or Committee

- A Certification Council that assesses individuals within a Provincial Certification Program
- Provincial Certification Councils do not have the authority to decide whether individuals should be within a National Certification Program, but can provide recommendations to a National Certification Council

Provincial Certification

- Provincial Certification has no bearing on the National Certification, but National Certification may be taken into consideration in the Provincial Certification at the discretion of the Provincial Association

Provincial Registrar

- An individual or organization responsible for keeping track of the all individuals who are part of a Provincial Certification Program

Qualification

- See 'Personal Background'
- *CAN-P-9 definition: demonstration of personal attributes, education, training, and/or work experience*

Standards of Practice

- Define the minimum scope of work required for the performance of home and property inspections
- A Standard of Practice should align with the tasks defined in a NOS
- CAHPI has developed a standard of practice for home and property inspectors

Sponsor

- A certified individual who publicly supports or endorses another individual for advancement within a Certification Program

Stages

- Individuals who are part of the National Certification Program for Home and Property Inspectors will be at one of two Stages – 'Candidate' or 'National Certificate Holder'
- 'Candidate' individuals have been accepted into the National Certification Program and are working towards the stage of 'National Certificate Holders'
- 'National Certificate Holders' are individuals who have been accepted into the National Certification Program and have met all the education, competence and experience criteria

Technical Training

- Courses or programs specifically related to an occupation

Technical Experience

- Work experience specifically related to an occupation

Test Inspection with Peer Review

- A method for verifying the competence of a Home and Property Inspector. A test inspection consists of the following steps:
    - The individual undergoing test inspection inspects a house with known defects
    - The individual prepares a written report and makes a verbal presentation on noted defects to a panel of home and property inspectors who are 'National Certificate Holders'. The panel could also include individuals who work in related occupations (e.g. realtors, mortgage lenders, property insurers, etc)
    - The panel evaluates and grades the individual's report and presentation for compliance with standards of practice, competencies as defined in the NOS, and code of ethics

Verification

- A means of proving or testing absorbed or learned knowledge
- For example, a course examination is a way of proving that an individual has learned and benefited from a course or program

Appendix A: Taxonomic Analysis Procedure

Guidelines for Accrediting a Course or Program using Taxonomic Analysis

A significant portion of this project involved the taxonomic analysis of existing training programs to determine the extent to which they met the requirements of the National Occupational Standards (NOS). The methodology used is called Task-Knowledge-Application (TKA) Analysis, and can be applied by the working group in future for accrediting any training course or program for certification.

All tasks have required skill (application) and knowledge components. The TKA analysis is a structured way of identifying these components and is typically used to design training that achieves specific competency objectives. It can also be used in reverse; that is, the task list from the NOS can be used to analyze a training course or program to determine where and to what level skill and knowledge are acquired.

The TKA Analysis identifies:

- Tasks not covered in a training program (curriculum gaps)
- Tasks which are covered, but which require additional skills/knowledge to be developed on the job (training gaps)
- Material that may be covered in a training program, but which are NOT part of the duties of practitioners within the occupation (training relevancy)

Note 1 (Taxonomic Gaps): although information may be **taught** at a higher taxonomic level, it has been our experience that the vast majority of module testing in training programs, including certification exams, test for knowledge at the lowest (recall) level of the taxonomy, and that skills are assessed using purely subjective criteria on the job. Thus, raw taxonomic analysis is best teamed with an actual audit of a training course or program to ensure that taxonomic gaps do not exist.

Assessing SKILLS (Application):

Dr. Willard Daggett is a world-renowned educator who conducted research into the consistent failure of training and education initiatives to transfer their knowledge and skills to the workplace.

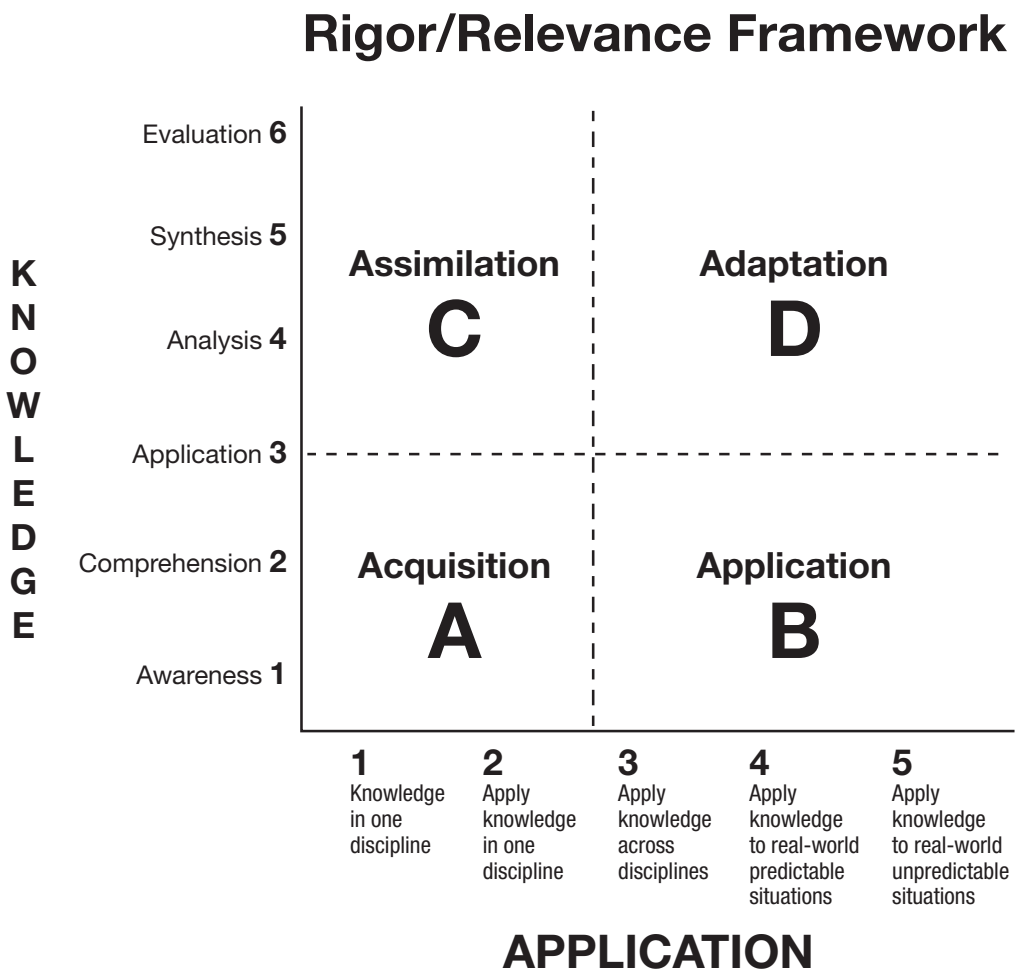
Essentially, Daggett took the 6 levels of knowledge developed by Bloom and built a corresponding system to measure levels of application.

There are 5 levels of relevancy, which coincide nicely with levels of application 'in the field':

1. Knowledge in one discipline
2. Apply knowledge within discipline
3. Apply knowledge across disciplines
4. Apply knowledge to real-world predictable situations, and finally
5. Apply knowledge to real-world unpredictable situations

Rigor/Relevance Framework

The Rigor/Relevance Framework is a tool developed by staff of the International Center for Leadership in Education to examine curriculum, instruction, and assessment. The Rigor/Relevance Framework is based on two dimensions of higher standards and student achievement. First, there is the Knowledge Taxonomy, a continuum based on the six levels of Bloom's Taxonomy, which describes the increasingly complex ways in which we think. The low end involves acquiring knowledge and being able to recall or locate that knowledge. The high end labels the more complex ways in which individuals use knowledge, such as taking several pieces of knowledge and combining them in both logical and creative ways.



Quadrant C – Assimilation Students extend and refine their acquired knowledge to be able to use that knowledge automatically and routinely to analyze and solve problems and create solutions.	**Quadrant D – Adaptation** Students have the competence to think in complex ways and to apply their knowledge and skills. Even when confronted with perplexing unknowns, students are able to use extensive knowledge and skill to create solutions and take action that further develops their skills and knowledge.
Quadrant A – Acquisition Students gather and store bits of knowledge and information. Students are primarily expected to remember or understand this knowledge.	**Quadrant B – Application** Students use acquired knowledge to solve problems, design solutions, and complete work. The highest level of application is to apply knowledge to new and unpredictable situations.

The second continuum, known as the Application Model, is one of action. Its five levels describe putting knowledge to use. While the low end is knowledge acquired for its own sake, the high end signifies use of that knowledge to solve complex real-world problems and to create unique projects, designs, and other works for use in real-world situations.

The Rigor/Relevance Framework has four quadrants. Each is labelled with a term that characterizes the learning or student performance at that level.

By analyzing the learning objectives in a program module, it is possible to determine the level of skill/knowledge acquired in that module. These are then plotted on the 5X6 matrix shown above.

Assessing Knowledge:

The knowledge taxonomy developed by Dr Benjamin Bloom recognizes six different levels of processing thought. These levels relate directly to rigor and complexity in thinking and learning. "Knowledge" is the simplest level while "evaluation" is the most complex. Knowledge level is assessed by analyzing the verbs used in the performance objectives for a particular course, as shown in the table below:

	Level	*Description*	*Action Verbs*
1	Knowledge	Recall information	define, describe, list
2	Comprehension	Understand information - Grasp its meaning.	explain, convert, rewrite
3	Application	Use ideas in particular situations	demonstrate, uses, compute
4	Analysis	Break down information into its parts	distinguish, discriminate
5	Synthesis	Put parts together to form a new whole	combine, design, rearrange
6	Evaluation	Make judgements about the value of methods or materials for a given purpose.	appraise, criticize, conclude, defend

Examples:

"Following training, learners will be able to **explain the benefits** of using a 3-faced widget cutter as opposed to the standard two-faced cutter, or manually using a hammer and chisel when fabricating widgets. (Rates Knowledge of 2).

"Following training, learners will be able to **analyze a fabrication problem** and determine which method (3-face, 2-face, hammer and chisel) is most appropriate, and explain why. (rates a Knowledge of 3)

Measuring Application

When using taxonomic analysis to measure application or skills, one looks for evidence in performance objectives of trainees actually being required to DO something.

Examples:

"Following training, the learner will **fabricate** a widget using a 3-face widget cutter. (rates an Application rating of 2)."

"Following training, the learner will **fabricate functioning widgets for specified machines to industrial tolerances** using the 3-faced, 2-faced widget cutter and manual hammer and chisel method. (rates an Application level of 4).

Appendix B: Partial List of Accredited Courses

Note: Information on these courses has been provided by members of the Working Committee, and has been put through the various accreditation tests with the exception of on-site audits. This list may be taken as the initial set of accredited courses to start the certification/accreditation program.

Provider	***Course***	***NOS Elements***
Humber College	Intro to Home Inspection HMIN 100	Task 2, 3, 5
	Plumbing for Home Inspection HMIN101	Task 2, 3, 17, 18, 19, 20
	Ethics for Home Inspection	Task 2, 3, 5
	Structures for home inspection HMIN 107	Task 1, 2, 3, 5, 6, 7, 8, 9, 10, 11, 12
	Building science for home inspection HMIN 108	Task 1, 2, 3, 5, 6, 7, 8, 9, 10, 11, 12, 13
	Electricity for Home Inspection	Task 2, 3, 21, 22, 23, 24
	Heating for Home Inspectors	Task 2, 3, 13, 14, 15, 16
Note: No modules for Task 4		
College Montmorency	Inspection en bâtiment I	Task 1, 3, 5, 6
	Inspection en bâtiment II	Task 3, 6, 9, 10, 11, 12
	Inspection en bâtiment III	Task 6,7,10,12
	Inspection en bâtiment IV	Task 10, 13, 14, 15, 16
	Inspection en bâtiment V	Task 13, 16, 17, 18, 19, 20
	Inspection en bâtiment VI	Task 1,2,3,5
	Inspection en bâtiment VII	Task 5, 7, 20
	Inspection en bâtiment VIII	Task 5, 13, 16, 21, 22, 23, 24
Note : No modules related to Task 4, 8		
Collège André Grasset	Code national du bâtiment	Task 1
	Droit Imobilier	Task 4, 5
	Éléments de construction	Task 6, 7, 9, 10, 11, 12
	Historique de la construction au Québec	Task 1, 2, 3, 6, 12
	Méchanique du bâtiment	Task 13, 14, 15, 16
	Rédaction de rapports	Task 1, 2, 3
	Structure du bâtiment	Task 6, 7, 9, 10, 12
Note : no modules for Task 8, 17, 18, 19, 20, 21, 22, 23, 24		
Vanier College	Residential Building Inspection I	Task 1, 6, 7, 8, 9, 11, 12
	Residential Building Inspection II	Task 1, 6, 7, 10, 12, 14, 21, 22, 23, 24
	Residential Building	Task 1, 2, 3, 13, 15, 16, 17,

	Inspection III	18, 19, 20
Note: no modules for Task 4, 5		
BCIT	BLDG 2915 – House Inspection 1	Task 6, 12
Note: No modules for Task 1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24		
Carson Dunlop	Air Conditioning and Heat Pumps	Task 14, 15
	Communication and Professional Practice	Task 1, 2, 3, 5
	Electrical	Task 21, 22, 23, 24
	Exterior	Task 1,6,7,8,9
	Heating I	Task 13, 16
	Heating II	Task 14, 16
	Insulation and Interiors	Task 10, 11, 12
	Plumbing	Task 17, 18, 19
	Roofing	Task 1, 3, 6
	Structure	Task 1, 6, 12
Note: no modules for Task 4, 17, 18, 19, 20		
Inspection Support Services	Onsite Home Inspection Training Course	Task 1, 2, 3, 4, 5
Note: no modules for Task 6 through 24		
Ministry of Municipal Affairs	Part 9 Course	Task 5, 6, 7, 8, 9, 10, 12, 16, 20
Note: No modules for Task 1, 2, 3, 4, 11, 13, 14, 15, 17, 18, 19, 21, 22, 23, 34		
Pillar to Post	Standard Inspector Training Course	Task 1 thru 24
Note: All NOS elements are covered		
The Home Inspectors Institute	Introduction to Residential Home Inspection	Task 1, 2, 3, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 17, 18, 20, 21, 22, 23, 24
Note: no modules for Task 4, 15, 16, 19		

NOTE 1: This accreditation table is based on the information provided by the Working Committee members. It is possible that providers have modules for missing NOS elements that were not included in this study.

Appendix C: Sample Forms

Sample: Identification of Training Provider & Application for Accreditation Form

From:

(Name and Title)

(Institution)

(Address)

(Telephone and Facsimile Numbers; E-mail Address; Web site)

Upon review of your Eligibility Criteria, we believe that our institution/program meets the criteria and wishes to make formal application to be accredited by your organization

In support of this application, we offer the following information:

1. This application is for **(check one, as necessary):**

☐ New accreditation ☐ Renewal or update to an existing accreditation

2. Our institution was first established in (month/year):
and has been continuously offering instruction since (year):

<Add registration number, business number, etc>

3. The institution and/or program(s) are licensed, chartered, or approved under the laws and regulations of the state or territory by:

<Name of Accrediting Agency and the Jurisdiction>

4. The programs offered and to be included under this accreditation are as follows (include program name, total length in days, weeks, clock hours, or other measure, as well as any portions of programs offered by distance education, including percentage):

Program Name	Length	% Distance

Application for Accreditation Continued

5. Our institution offers certificates, diplomas or other formal recognition for course or programs

Program Name(s):

6. Our first student was enrolled in the following program(s), enrolling and graduating as follows (month, year):

Program	Date enrolled	Date graduated

7. During the past full year of operation, we enrolled and graduated the following number of students in the following program(s):

Program	# Enrolled	# Graduated

8. Has accreditation ever been denied initially or removed (e.g., denial, withdrawal, suspension, revocation, relinquishment) from your institution by this or any other agency?
☐ Yes ☐ No If yes, explain.

9. Has provincial or state licensing ever been removed?
☐ Yes ☐ No If yes, explain.

Our institution is approved or accredited by the following professional organizations (include programmatic accreditation):

<NAME ORGANIZATIONS HERE>

Name and Title of Chief Executive Officer:

Signature:

Date:

Sample: Course or Program Information Sheet

Provider: _____

Course Name and Number: _____

Prerequisite Skills: _____

A. List topics to indicate scope and sequence of the subject's content.

B. List the performance objectives or competencies that indicate what the student will be able to do after completing the course. Include teaching methodologies and evaluation tools that will be used to assess student achievement.

Topics	Performance Objectives/Competencies/Teaching Methodologies/Evaluation Tools

Sample: Course or Program Review/Mapping Form

Provider: _____

Course Name and Number: _____

Fill in the following form to indicate, by topic, which elements of the NOS are covered and to what extent. An example is provided.

Topic (per course/ program information sheet)	NOS Task	NOS Subtask	Knowledge Rating (per TKA analysis)	Application Rating (per TKA analysis)	K/A Delta	Comment
EXAMPLE ONLY: Foundations	B.6: Visually inspects exterior structure	6.01: Visually inspects condition of exposed foundations	3	1	K- 0 A- 1	This course is designed to provide adequate background knowledge to enable the successful trainee to perform the task, but does not provide sufficient real-world application to replace experience.

Appendix D: Implementation – Complying with CAN-P-9 Criteria

- *Please see the CAN-P-9 section of this report for more information.*
- *Please see the CAN-P-9 document published by the Standards Council of Canada document for detailed item descriptions*

For a detailed description of all CAN- P9 items, refer to the CAN P-9 Standard

CAN-P-9 Requirements for Certification Bodies (Item 4.1)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
4.1.1	Policies and procedures shall be: • Related to certification criteria • Fair and equitable among all candidates • Compliant with applicable regulations	• CAHPI will develop appropriate policies • Applicants from within and outside CAHPI associations are eligible to apply for certification
4.1.2	Policies and procedures for: • granting, maintaining, renewing… • expanding AND reducing the scope of certification • suspending or withdrawing the certification	• The certification program developed through this project defines policy for granting, maintaining, and renewing certification. • The certification program developed through this project allows for suspension or withdrawal of certification
4.1.3	Restricted to matters related to scope of desired certification	• The focus of the National Certification Council should be limited to certification issues.

CAN-P-9 Requirements for Organization Structure of Certification Bodies (Item 4.2)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
4.2.1	• Independent, impartial • Responsible for decisions • Identified group - e.g. certification committee • Legal entity	• CAHPI will hold ultimate responsibility for the actions of committees and councils • CAHPI will delegate authority for certification to the National Certification Council • CAHPI will delegate authority for accreditation to the National Accreditation Committee • CAHPI is a recognized legal entity and is a national Home Inspection Association
4.2.2	• Documented structure that safeguards impartiality	• Individuals and organizations that are members of CAHPI (and/or national committees and councils) will have to avoid conflict of interest situations and declare conflicts
4.2.3	• Scheme committee - responsible for each type of certification • 'classes' of candidates	• Individuals who are within the national certification program are at one of two 'stages' – either 'Candidate' or 'National Certificate Holder' • CAHPI will set up a process to review the requirements for certification on a regular basis
4.2.4	• Financially viable • Related activities must not compromise certification	• The costs of implementing and maintaining a national certification program have been considered in this project • At the present time it is unknown whether a national certification program for home and property inspectors could be self supporting
4.2.5	• Training MUST be independent of evaluation and certification	• CAHPI National and subordinate committees and/or councils will not be involved in the training of home and property inspectors
4.2.6	• Policy and procedure for resolution of appeals and complaints	• A mechanism to deal with complaints will have to be created. CAHPI has a Professional Practices and Discipline Committee in place
4.2.7	• Knowledgeable people - education, training, technical knowledge and experience	• CAHPI will have to involve individuals who are familiar with the home and property inspection occupation, as well as approaches to training and education

CAN-P-9 Requirements for Development and Maintenance of a Certification Program (Item 4.3)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
4.3.1	DEFINED methods and mechanisms used to evaluate competence of candidates	• The national certification program defines the competencies required to be within the national certification program
4.3.2	Process for development and maintenance of certification schemes	• It will be necessary to develop this process – mechanisms for ensuring the national certification program meet the overall mandate of CAHPI
4.3.3	Defined 'process' for changing the certification process	• Policy to be developed – the national certification process and national certification program should undergo a major review about a year after implementation. Then, a major review every five years
4.3.4	Evaluation criteria clearly defined	• CAHPI will have to publish the details of the certification program – to make sure individuals who may be interested in becoming part of the national certification program know what is required
4.3.5	Certification cost should be reasonable… no unreasonable limitations	• The cost of background review (for either stage) will be kept reasonable. The only other criteria for national certification will be competence – as defined by the NOS, and compliance with the CAHPI Code of Ethics and a Standard of Practice
4.3.6	• Examinations fair, valid, and reliable • Procedures that confirm fairness	• The National Certification Council and/or National Accreditation Committee will monitor all examination methods used by accredited training providers and peer review groups to ensure consistent fairness, validity, and rigor across the country

CAN-P-9 Requirements for a Management System for Certification Bodies (Item 4.4)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
4.4.1	• Documented 'management' system • Covering databases and paper files, policy and procedure	• CAHPI will develop a management system for certification
4.4.2	• Established, maintained, understood, and implemented	• Once the management system is developed, the system will undergo process mapping, and then explained to everybody who is affected
4.4.3	• Document control • Internal audit system • Management review system	• CAHPI will develop a management system for document control and internal audit

CAN-P-9 Requirements for a Subcontracting of Certification Issues (Item 4.5)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
4.5.1	• CAN subcontract some certification work, but NOT decision on certification • Formal agreements	• The National Certification Council will make all decisions regarding certification – who will be within the national certification program • Elements of the background review process may be 'subcontracted' to provincial certification councils or other organizations that have signed formal agreements to do so • The National Certification Council should meet regularly (probably quarterly) to make decisions on which individuals should be accepted into the certification program, and/or which individuals should be moved from one stage to another within the certification program
4.5.2	• Certification body remains responsible • Must ensure sub contractor is competent and accountable	• An appeal process (for individuals who apply for 'Candidate' or 'National Certificate Holder' status in the National Certification Program) will have to be developed to ensure subcontractors are using the same evaluation criteria as the National Certification Council and/or the National Accreditation Council

CAN-P-9 Requirements for Record Keeping (Item 4.6)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
4.6.1	• Appropriate record system… including a means to confirm the status of a certified person • Demonstrate fulfillment of certification process	• A database of individuals who are within the National Certification Program would be maintained by CAHPI – although the task will be delegated to the CAHPI registrar • The database would include background information that justifies the inclusion of each individual who is within the National Certification Program (or a link to the information)
4.6.2	• All handling must demonstrate integrity of process… confidentiality of information	• Access to the national database for data entry, query, or modification purposes would have to be controlled using a password protocol. All changes, additions or modifications to the database would be logged (including the identity of the person who made the changes) and reported to the National Certification Council on a regular basis

CAN-P-9 Requirements for Confidentiality (Item 4.7)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
	• General compliance with privacy act - disclosure requires written consent • Legally enforceable commitment to confidentiality	• The names of individuals who are within the national certification program may not be considered 'private' information under the privacy act. If it is 'private', the national registrar would have to receive a permission form from each individual authorizing disclosure • Specific individual background information would be confidential • All individuals with access to private information should be required to sign a confidentiality and/or non disclosure agreement

CAN-P-9 Requirements for Security (Item 4.8)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
	• Exams and related items kept secure when necessary *e.g. prior to exam date*	• Policy to be created and controls to be put in place

CAN-P-9 General Requirements for Certification Body Personnel (Item 5.1)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
5.1.1	• Defined competence requirements for people involved in certification process	• The people who are part of the National Certification and Accreditation Councils and or Committees must be competent • At least some should be home and property inspectors. Others may come from training backgrounds, or from occupations related to home and property inspection (such as real estate, mortgage lending, or property insurance)
5.1.2	• Signed document committing to compliance with rules… confidentiality, independence • Includes links to persons being examined	• Employee or contracted individuals working or acting for the CAHPI or the National Certification and Accreditation Councils and or Committees will have to sign confidentiality, non disclosure, and conflict of interest releases • Anything that compromises the impartiality of an employee or contracted individual must be declared, including relationships with individuals who are applying for background review
5.1.3	• Documented duties and responsibilities • Includes employees and contractors • Appropriate education, experience, and technical expertise	• Detailed organization charts and job descriptions will have to be created for CAHPI and the National Certification and Accreditation Councils and or Committees
5.1.4	Documented qualifications of each individual involved in certification	CAHPI must select competent individuals as employees and/or contractors, and be able to prove competence through resumes on file and completed reference checks

CAN-P-9 Requirements of Examiners (Item 5.2)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
5.2.1	• Familiar with the certification scheme • Thorough knowledge of exam methods and documents • Appropriate competence • Fluent in language • Impartial and non discriminatory	• The people who conduct background review will have to have a thorough understanding of the certification program and the objectives of CAHPI • Some individuals applying for background review may come from associations that are not affiliated with CAHPI. This should not be an issue – ability to perform NOS tasks should be the primary issue
5.2.2	• Conflicts of interest noted and dealt with	• People who conduct background review will have to declare all conflicts. In some cases it may not be appropriate for individuals on the CAHPI Board of Directors or the National Certification Council (or a subcontracted organization) to participate in background review if they know the individual under review

CAN-P-9 Application for Certification Process (Item 6.1)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
6.1.1	• All details of certification process on request • Fees, requirements, rights, duties - including code of conduct	• CAHPI will have to publish all details of the national certification program • Many of those details are in this report, and others have to be developed through policy
6.1.2	• Completed application by applicant including agreement to comply	• This is essentially the application for background review

CAN-P-9 Evaluation of Application (Item 6.2)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
6.2.1	Review application to confirm: • Capability to deliver • Awareness of reasonable special needs including language • Ensure requirements are met	• This is essentially the background review process
6.2.2	Examine competence • Written • Oral • Practical • Observational • Other means *whatever methods are appropriate*	• The national certification program covers this. The program includes technical courses and exams which must be passed, technical experience, and 'Test Inspections with Peer Review'
6.2.3	Exams planned and structured to ensure all scheme requirements are objectively and systematically verified	• Many courses and programs have been reviewed to confirm that they cover the tasks defined in the National Occupational Standard. The list of courses and programs that have been accredited are included in the appendix
6.2.4	Procedures to ensure the results of exams are properly documented	• Each individual who within of the national certification program will have a file (paper and/or electronic) that tracks exam results and other issues related to their progress through the National Certification Program

CAN-P-9 Decision on Certification (Item 6.3)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
6.3.1	• Made by certification body based on information gathered during the process • No involvement in training or examination of candidates	• The National Certification Council will decide which individuals are within f the National Certification Program, and which stage the individuals are at – 'Candidate' or 'National Certificate Holder' • The council will base decisions on the comparison of an individual's personal background to the background requirement defined in the National Certification Program
6.3.2	• Provide certificates to certified persons • Certificates remain property of certification body	• CAHPI will create certificates for 'National Certificate Holders'.....and possibly a different certificate for 'Candidates'
6.3.3	Certificates include • Name of certified person (and cert #) • Name of certification body • Reference to competence standard • Validity conditions and limitations • Effective date…date of expiry •	• To be created by CAHPI

CAN-P-9 Surveillance of Certification (Item 6.4)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
6.4.1	Proactive process to monitor certificant's compliance with the scheme	• CAHPI has a 'complaint' process and a 'discipline' process, through which the general public or other practitioner can complain about the conduct of individuals who are part of the National Certification Program
6.4.2	Confirm continuing competence • *Practice review* • *Ongoing development requirement*	• Maintenance requirements for 'Candidate' and 'National Certificate Holders' have been developed and are part of the National Certification Program

CAN-P-9 Re Certification (Item 6.5)

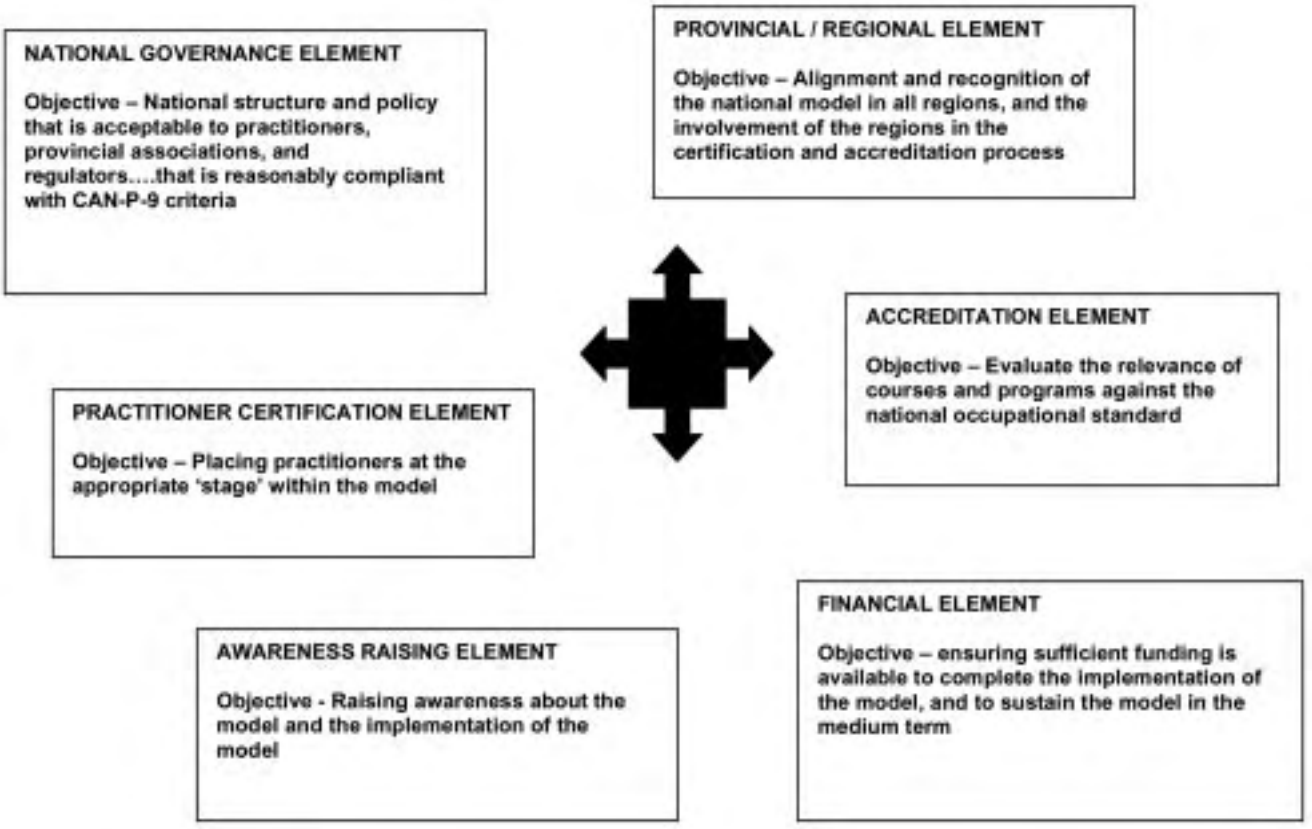
CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
6.5.1	• Defined requirements for recertification • Continued compliance	• Individuals who are 'Candidates' for more than three years must re apply for 'Candidate' status • A maintenance requirement has been developed for 'National Certificate Holders', and is part of the National Certification Program
6.5.2	• Frequency and content • Adequate to ensure impartial evaluation of continued competence	• See above

CAN-P-9 Use of Certificates, Logos, and Marks (Item 6.6)

CAN-P-9 Item #	CAN-P-9 Item Description	Proposed HPI National Certification Model
6.6.1	Documented conditions for mark or logo use	• Only members of CAHPI associations will have CAHPI logo use privileges
6.6.2	Certified persons sign an agreement to: • *Comply with provisions of scheme* • *Limit claims to scope of certification* • *Protect certification body's integrity* • *Stop using certification if suspended* • *Not use certificate in a misleading way*	• CAHPI has a code of ethics in place
6.6.3	Corrective measures where certification is used in an inappropriate or misleading way.	• CAHPI has a 'complaint' process and a 'discipline' process, through which the general public or another practitioner can complain about the conduct of individuals who are part of the National Certification Program

Appendix E: HPI Strategic Framework - Moving Forward

The strategic framework consists of multiple elements, none of which can be taken in isolation. The broad blocks of the framework are shown below, and amplified in this Appendix.



NATIONAL GOVERNANCE ELEMENT

Objective – National structure and policy that is acceptable to practitioners, provincial associations, and regulators….that is reasonably compliant with CAN-P-9 criteria.

Issues to Consider and Resolve

1. Negotiation of Memorandum(s) of Understanding between the National Body and organizations assisting with national certification and/or accreditation.

    - o CAHPI associations
    - o Other related associations (possibly technicians and technologists)
    - o Other organizations who are involved in Certification or Accreditation

2. Development of governance policy for the National Certification Body

    - o Includes a final decision on who the National Certification Body will be
    - o Definition of responsibilities of the National Certification Body
    - o Creation of appropriate bylaws and policies, including
        - Conflict of interest for committee and/or council members
        - Tenure of committee and/or council membership
        - Mechanism for appointment to a committee and/or council
        - Et cetera

3. Development of governance policy for the National Certification Council

    - o Make up of the council
    - o Bylaws
    - o Definition of responsibility
    - o The certification process
    - o Review of organizations that could assist with certification

4. Development of governance policy for the National Accreditation Council

    - o Make up of the council
    - o Bylaws
    - o Definition of responsibility
    - o The accreditation process
    - o Review of organizations that could assist with accreditation

5. Appointment of a national registrar

    - o Who the national registrar will be
    - o Mechanism for accessing information on individuals who are within the national certification program
    - o Mechanism for accessing information on accredited courses and programs

6. Decisions on certificate use, logo use, designation use

    - Use limitations placed on individual practitioners
    - Use limitations placed on provincial associations
    - Certification control – printing, distribution

7. National code of conduct

    - To be reviewed and formally adopted…all individuals within the national certification program must agree to be bound by the national code of conduct

8. Disciplinary process

    - Mechanism to hear grievances against individuals who are within the national certification program
    - Mechanism to discipline individuals who are within the national certification program
    - This may require a separate 'discipline' committee

9. Appeal process

    - Mechanism that allows individuals the appeal the decisions of the national certification council
    - Mechanism that allows training providers and other organizations to appeal the decisions of the national accreditation council
    - This may require a separate 'appeals' committee

Where possible policy should be compliant with CAN-P-9 criteria

PROVINCIAL / REGIONAL ELEMENT

Objective – Alignment and recognition of the national model in all regions, and the involvement of the regions in the certification and accreditation process.

Issues to Consider and Resolve

10. Recognition of the national model ...and national certification and accreditation....by the provincial and regional associations.

    - This will be determined through Memorandum(s) of Understanding between the National Certification Body and each provincial association
    - The memorandums will have to be presented and explained to practitioners who are members of provincial associations

11. Regional early adopters / influencers – develop a list of key people inside (or outside) provincial or regional associations who support the concept of national certification....

    - These people must be contacted and their willingness to support the national certification model confirmed
    - A plan that will allow them to effectively spread the word may have to be developed
    - In some cases the early adopters will be the regional board or regional certification / accreditation committees

12. Alignment of provincial / regional programs with the national model.

    - This may mean changes to provincial / regional association bylaws on a province by province basis will have to be made to support the national certification model
    - Whether or not each provincial or regional association will do this (and when) is outside the control of the National Certification Body

13. Involvement of provincial / regional background review committees in the national background review process

    - Decision as to whether or not provincial associations will be involved in conducting background review and making recommendations to the national certification council...and the depth of provincial involvement
    - The proportion of the national background review fee that should be paid to provincial associations conducting background review
    - Make up of the provincial committee - e.g., some committee members may not be practicing HPIs....this issue would be determined in part by national policy....after discussion with the provinces

PRACTITIONER CERTIFICATION ELEMENT

Objective – Placing practitioners at the appropriate 'stage' within the model.

Issues to Consider and Resolve

14. Approval of the certification process as outlined in the CHIBO report by the National Certification Body and/or Council ...or approval of a modified certification process.

15. Development and acceptance (by the National Certification Body) of background review forms and checklists to be completed by the applicant for certification, including:

    - Application for background review (form)
    - Sponsor endorsement (form) (if appropriate)
    - Agreement to abide by 'Code of Conduct', and an acknowledgement that disciplinary measures may result from failure to abide by 'Code of Conduct'
    - Practitioner logbook
    - Certification maintenance form
    - Resume form...or a copy of an individual's current resume

16. Development of a 'Background Review Appeal Process'

    - A mechanism that allows individuals unsatisfied with a decision on their placement within the national certification program

17. Development and acceptance (by the National Certification Body) of background review forms and checklists to be completed by the National Certification Council (or delegated to regional certification committees), including:

    - General education checklist (may include transcripts or equivalent)
    - Technical education checklist (may include transcripts or equivalent)
    - Direct experience checklist
    - 'Test Inspection with Peer Review' report and/or checklist
    - Maintenance checklists

Link to Accreditation

The National Accreditation Committee will review the courses and programs presented by applicants as appropriate background to the National Certification Council (or provincial / regional committees) to determine the relevance of the courses and programs to the national certification program

18. Training the people who will serve on national and provincial / regional certification committees on how to conduct background review

19. Testing of the background review process by conducting background review of a 'pilot' group of practitioners

20. Creation of a mechanism to hear and respond to public complaints against individuals who are within the National Certification Program, including:

    - Lodging the complaint – could be done with a standard complaint form
    - Hearing process
    - Judgment process
    - Levels of punishment – warning, suspension, expulsion
    - An appeal process of some kind

ACCREDITATION ELEMENT

Objective – Evaluate the relevance of courses and programs against the National Occupational Standards

Issues to Consider and Resolve

21. Approval by the National Accreditation Committee of the accreditation process as outlined in the CHIBO report

22. Development and acceptance (by the National Certification Body) of course accreditation forms and checklists, including
    - Course developer profiles
    - Course instructor profiles
    - Course pass rates
    - Course outlines and learning objectives
    - Number of course completions in the past 5 years
    - Course pre requisites
    - Examination protocols
    - Equivalency analysis – how the course equates to elements of the National Certification Program

23. Decisions on fees (if any) for course and/or program accreditation

24. Decisions on who will develop, modify and maintain the accreditation database

    - Handover of the existing accreditation database (CHIBO) to the National Accreditation Committee….probably to an appointed 'national registrar'
    - Decisions on which database elements will be private and publicly accessible database elements
    - Database contractors – who provide 'registrar' services

25. Training people who will serve on the national accreditation committee on how to accredit courses and programs

26. Program audit – development and acceptance of a procedure for performing a follow up audit of an accredited course or program

    - Mechanism for on site spot audits of courses and programs

AWARENESS RAISING ELEMENT

Objective – Raising awareness about the model and the implementation of the model

Issues to Consider and Resolve

27. Communication with industry practitioners – both members and non members of provincial associations….and franchise operators

    - Will require access to mailing and contact lists

28. Communication with regulators

    - Will require access to mailing and contact lists

29. Communication with other stakeholder groups - insurance companies, real estate associations, financial institutions, etc

30. Communication with agencies and organizations that may help fund the implementation of the model

31. Communication with training providers

    - Will require access to mailing and contact lists

32. Formal appointment of spokespersons to speak to each awareness raising group

33. National and regional awareness raising…advertising, meetings, speaking engagements

For consistency, awareness raising should be coordinated nationally through the national certification body

FINANCIAL ELEMENT

Objective – ensuring sufficient funding is available to complete the implementation of the model, and to sustain the model in the medium term

Issues to Consider and Resolve

34. Implementation cost estimate – per practitioner….and for 1000 practitioners
    - How much of the work will be done by volunteers?
35. Cost of national registrar services – development and maintenance of databases
36. Cost of certification services – volunteer portion….paid portion
37. Seeking sources of funding
    - Assigning people to approach funding agencies to seek funding
38. Ongoing costs of keeping an individual (at any stage) within the national Certification Program.
39. Decision on background review fees to charge during national implementation (if any)….. and what background review fee to charge individuals after national implementation
40. Decision on annual national membership fees to charge during national implementation (if any)….. and what national membership fee to charge individuals after national implementation
41. Decision on national office location……
42. Decision on who collects membership fees and who disburses funds

Appendix F: Outsourcing Guidance

Outsourcing Certification and Accreditation

In order to move beyond the implementation plan it will be necessary to accomplish many specialized tasks. Some of these will be beyond the capacity of the organizations using volunteer labour, and for these it may be necessary to consider outsourcing all or part of the process.

Effective outsourcing of business processes is a five step process:

Step 1: Assessing Your Own Organization
Step 2: Determining What You Want From an Outsource Partner
Step 3: Determine Likely Candidates and Craft an RFP
Step 4: Select a Vendor and Negotiate an Effective SLA
Step 5: Manage the Relationship

Step 1: Assessing Your Own Organization

The first step in embarking on an outsourcing arrangement is a critical look in the mirror to determine the strengths and weaknesses of the organization, what services/ processes can be outsourced, and finally to determine whether outsourcing these processes is the right thing to do from a strategic as well as a tactical perspective.

It is often difficult for an organization to admit that they need help, and to this end a detailed capability assessment, or SWOT analysis, should be carried out. While this degree of assessment was beyond the scope of this project, we have determined some likely candidates for outsourcing to aid in moving the certification program forward.

The likely candidates for outsourcing are:

- Background review
- Accreditation services
- Competency testing; and,
- Certification records management.

Each of these elements is dealt with below.

Background Review

The purpose of background review is to review the personal history and experience of individual members as a component of the certification process. Reviewers will assess an individual's background, including years of experience, relevance of experience, specific training and education against the criteria for certification and indicate a degree of compliance.

While these tasks can be done by volunteers, it may be best to allow an outside vendor to conduct background reviews following the certification model process.

Elements to consider in an outside vendor to undertake this function may include:

- Bonded (or bondable)
- Familiar with privacy acts/laws
- Capacity to create and maintain a secure database
- Able to manage a system for securely collecting, storing and transferring personal information from members
- Experience in conducting background review or PLAR in a professional certification environment.

Accreditation Review

The purpose of accreditation review is to assess the capability of training providers to deliver training that meets the required skill/knowledge requirements of the NOS.

Accreditation reviews may take place at the request of an individual (who claims training from an unaccredited provider as part of background review), or by a training provider who wishes to be recognized by the association. Given the close ties between background review and accreditation review, it is essential that good communication exists between the agencies involved.
Elements to consider in an outside vendor to undertake this function may include:

- Bonded (or bondable)
- Able to follow process
- Experience in course assessment
- Experience in instructional audits
- Experience in developing and monitoring training standards

Competency Testing

The purpose of competency testing is the verification of candidate knowledge against specific portions of the NOS. For individuals who have the necessary knowledge without having gone through a formal training regimen, it may be desirable to develop and implement a series of challenge exams. Some jurisdictions already have these in one form or another, but a national certification program may require standardization. The certification body may develop and implement its own exams, or it may outsource this to an appropriate agency in order to maintain an arm's length relationship with the examination process.

Elements to consider in an outside vendor to undertake this function may include:

- Bonded (or bondable)
- Familiar with privacy acts/laws
- Able to create and administer tests using random question banks, weighted as per the NOS
- Able to demonstrate capability to analyze test results to determine if questions are properly worded, and whether or not they are correctly developed for the level of knowledge deemed necessary in the NOS

- Proven ability to manage security requirements to ensure that test questions and responses are kept confidential
- Able to maintain adequate records of student attempts, scores, and provide this information in a timely manner to the certification body

Certification Records/Database Management

It is essential that comprehensive records exist to track individuals through the certification process, as well as having a publicly accessible repository for certified individuals. This process needs to recognize issues of individual privacy and safeguard personal information while still allowing the day-to-day administration of the certification process. It may be cost-effective to bundle the management of certification records/database with general member management services, which can then be done internally or outsourced.

Critical considerations for this element may include:

- Ability to set up and run a secure database
- Detailed knowledge of privacy legislation
- Ability to customize database applications to suit changing requirements

Strategic Considerations

It is essential that the organizations consider carefully the strategic ramifications of outsourcing elements of their business processes. It is also important to note that well documented, proven processes are easiest to outsource, and at the present time the certification and accreditation processes are only models and guides. This could make finding an appropriate vendor for these services difficult.

It is also important that the organization ask itself whether outsourcing a particular process is in its long-term strategic interest; that is, does it make sense to have an outsider perform a task that can (or should) be done internally. If the process is being outsourced because of a lack of internal resources or expertise, is it in the organization's strategic interest to develop that capacity? This may mean that the outsourcing is short-term, which can have a significant effect on the type of vendor required (Step 2), the type of RFP to develop (Step 3), the type of vendor likely to respond, and the type of service level agreement that will have to be negotiated (Step 4), and will also have an impact on how the outsource agreement s managed (Step 5). Clearly this is not a set of decisions that can be taken lightly.

Step 2: Determining What You Want From an Outsource Partner

It is important that the organization rate factors to determine what it is they really want from an outsource vendor. Included below are a few criteria to guide this discussion.

Reliability: can you afford to have your vendor's systems down for maintenance or other outages? If so, for how long? How much warning do you require? Do you need backups?

Responsiveness: how important is it to get immediate response from the vendor? More importantly, how important is it to the certification candidates/members they will serve?

Quality: What are the quality criteria you expect your vendor to maintain? Are there standards (ISO, others) that you need? What quality assurance programs do you need the vendor to adhere to?

Value for money: While price is an obvious consideration, a decision on a vendor should be focused on VALUE. If you desire reliability and quality - you will have to be prepared to pay for them. You need to understand what the service is worth to you, in order to ensure you are getting the maximum benefit for the price. .

Financial security: Is the vendor solvent? Is the vendor likely to stay that way? Consider running credit checks on potential vendors/partners – they will likely run one on you as well.

Partnership approach? Pair of Hands? Or something else?: – Do you want someone who will follow a process to the letter? Or someone who can suggest ways of improving it? Different requirements here require a different type of vendor, and a different management style from you.

Step 3: Determine Likely Candidates and Craft an RFP

A well-written Request for Proposal (RFP) communicates your organization's service needs and requirements and increases the number of potential vendors, theoretically maximizing the quality of the final deal and minimizing the price.

Writing a good RFP takes time. This could mean several months from initial formulation to vendor selection. If you have never written an RFP (or are unfamiliar with writing one of this magnitude), some guidelines are presented below:

If you've done a good job at Step 1, then writing the RFP is easier. It is essentially the organization, tabulation and communication of the needs and requirements unearthed during the assessment.

In general, any RFP has classic elements, and an RFP for an outsourcing arrangement needs some additional details.

Classic elements:

- Organization profile (who you are)
- Performance expectations and service requirements
- Existing technology and infrastructure
- Instructions on the submission criteria
- Details on how proposals will be evaluated- evaluation criteria and weighting, timetable, reference checking process, etc.

- Specific questions about the organization responding, the team they intend to use, and their experience in this type of job

Explain why you are seeking a change and provide a good description of your current situation, as well as a vision of what the process would look like after an outsourcing arrangement was implemented and how everything would fit together. Tell the providers how you want their response to look, whether it should be electronic or paper, the number of copies, what support documents to attach, etc.

You also need to describe how your process works and what it costs. Then describe how you'd like that process to work in the future. Next, ask the provider to suggest a better way to produce that future process that works and use the RFP to invite potential providers to tell you how they would get you to that future — or sometimes how they might create a future process that works even better than the one you envision.

Additional Elements:

- Initial contract terms, including pricing, etc.
- Indemnity clauses, intellectual property rights
- Required warranties
- Draft service level agreements
- Details on how the contract will be managed, etc.

How much detail and specificity built into the RFP is largely dependant on the maturity of the process being outsourced: if you have a very clear, mature process, then you can be very specific in demanding services and asking questions. On the other hand (and in this particular case) the RFP can and should serve as a vehicle for opening a dialogue with potential vendors to determine the best way to accomplish tasks where specific processes may not be well developed.

A good RFP also anticipates the contract. The more of the contractual negotiations you can pre-empt by having the provider present a proposal in terms that can be cut and pasted into a contract, the easier the negotiations will be.

In short, enough detail to allow a vendor to do a credible job of adequately addressing the organization's requirements, and to give you enough information to assess and select an appropriate vendor. A successful RFP should provide you with the information necessary to narrow the potential providers down to a very short list, ideally just two or three providers.

Once the RFP is crafted, it must be sent to potential suppliers. One of the best sources for finding potential vendors is industry associations (Canadian Society of Association Executives, etc), other industry contacts, and word of mouth referrals from other associations. A list of some potential providers is included at the end of this section.

> **Note**: This list is not intended to be a comprehensive listing of all firms which may be capable of providing outsourcing services. Its purpose is to act as a starting point in determining potential vendors who may be able to offer their services.

Step 4: Select a Vendor and Negotiate an Effective SLA

As the evaluation of RFP submissions pares down the list of potential vendors, final selection must be made. Again, understanding what you need from the vendor and establishing selection criteria up front will make this step significantly easier.

In selecting a potential vendor, you should consider:

- **Industry expertise.** Is a vendor familiar with this industry? Do they specialize? Is there evidence of ability to innovate?

- **Demonstrated reliability.** Can you rely on them? Did a vendor respond promptly? Did they ask question? Did they answer questions? Did they appear to be interested in your business problem? What's their track record? How long have they been in this business? How long have they provided this service?

- **Flexibility.** Has the vendor shown an ability to add resources and people, or to adjust to changing economic or technological circumstances? Does a vendor have flexible contract terms, exit strategies, etc? Remember that the vendor is in the business of crafting and delivering on outsourcing contracts: chances are good that they've learned how to build contracts that are win-win. It is also probable that they've learned to exploit the inexperience of a client new to outsourcing.

Once a vendor is selected, you can begin the process of finalizing a service level agreement.

Service Level Agreements

Service Level Agreements (SLAs) are the contractual obligations which guide the outsourcing project. SLAs bind both parties to specific deliverables, response times and support, and are invaluable in managing the overall outsourcing agreement. They have value in any relationship where an organization's ability to fullfil its own obligations (to members, or others) are dependant on the supplier.

SLAs cover all aspects of the outsourced work, so that both parties know what to expect. SLAs define the service that suppliers must provide, the level of service to be delivered and set out responsibilities, priorities and dispute resolution procedures.

SLAs are complex documents that should be well defined. It is worthwhile getting advice from a legal professional while drafting an SLA.

Crafting the SLA

Crafting the SLA should be a collaborative process between you and the vendor. Beware of the "standard contract" that cannot be modified.

If new to outsourcing, performance metrics will help break down a process and measure specific elements, such as the time to process a membership request. As the agreement matures and the vendor masters the process, the metrics should be altered accordingly: that is, the bar should go up (or the costs per transaction go down) to match that level of sophistication. New performance measures may be necessary as the old standards become routine.

Typical SLAs include:

- A detailed description of the service(s) provided
- Details of the transition of services from the organization to the vendor
- The standards of service
- Timetables
- Responsibilities of both the service provider and the contracting agency
- Provisions for legal and regulatory compliance
- Mechanisms for monitoring and reporting of service
- Payment terms
- Dispute resolution processes
- Confidentiality and non-disclosure provisions
- Termination conditions

If a vendor doesn't meet the required service levels established in the SLA, there is generally provision for penalties (or rewards if they do). If the critical components have been identifed beforehand (Steps 1 and 2) then the key areas of the SLA can be drawn up and penalties/incentives placed on these most critical areas, as well as focusing periodic performance reviews on the areas of greatest value.

SLAs require management. Needs can change, and the agreement may have to change along with them. This flexibility should be part of the SLA: either party should have the ability to re-open parts of the agreement should circumstances arise that necessitate changing the deal. Also, if technology is a part of the outsourcing solution, make sure service levels and regular technology upgrading are included in the contract.

Exit Strategy

All outsourcing contracts should contain an exit strategy. Otherwise, the ending of an agreement, whether premature or not, can be difficult and expensive. The exit strategy will detail how the outsourced functions will be brought back in-house (or transferred to another vendor). In addition, the issues surrounding intellectual property and other assets must be detailed in the SLA.

Step 5: Manage the Relationship

Once an agreement is signed comes the job of managing the agreement and the relationship.

This on-going management could account for 8-10% of the budget for the service. Day to day management of the SLA is a process of verifying performance metrics contained in the agreement, generally through

some sort of periodic formal reporting. Performance metrics force both parties to concentrate on the important details of the agreement.

Beyond that, the management of the process must be one of communication: open, honest and regular.

Potential Outsourcing Providers

Association Management Services (General Management, Certification, Accreditation)

Association Management, Consulting & Evaluation Services (AMCES)
www.amces.com

Associations First Ltd.
www.associationsfirst.com

Essentient Association Management
www.essentient.ca

Kestrel Companies Group Inc.
www.singlesourcemanagement.com

McPhersonClarke
www.mcphersonmanagement.com

Sirius Solutions
www.siriusassociations.ca

Taylor Enterprises Ltd.
www.taylorenterprises.com

Associations Plus Inc
www.associationsplus.ca

Base Consulting and Management Inc.

Gestias Inc.
www.gestias.com
Monsieur Charles Beaudoin, President

Le Groupe ONEC/The ONEC Group
www.onec-group.com

Pathfinder Association Management Group
www.pathfinder-group.com

Strauss Event & Association Management
www.strauss.ca
Mr. Jonathan N. Strauss, President

Competency Testing:

International Codes Council
www.iccsafe.org

Staff Testing Inc.
www.stafftesting.com

The Whitener Group (subsidiary of the National Occupational Competency Testing Institute)
www.whitenergroup.com

Ramsay Corporation
www.ramsaycorp.com

Records Management

(See Association management vendors)

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