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PART II – SECTION 6 (b)

PROFESSIONAL COMPETENCE EXAMINATION
FOR ENGINEERS

-BAPEQS Training Scheme and Guidance-

QUALIFICATION AND EXAMINATION COMMITTEE
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BAPEQS Training Scheme and Guidance

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Introduction

This document is for trainees, supervising engineers (SEs) and delegated engineers (DEs) who are involved in the BAPEQS Training Scheme.

The first half of the document sets out the BAPEQS Training Scheme.

The second gives more detailed guidance on the various aspects of the Training Scheme. It's split into guidance notes, which include information on the roles of trainees, SEs and DEs; setting up a scheme and a Training Agreement; that help manage the scheme and record training.

In Appendix A, you'll find some useful definitions of terms that are associated with the Training Scheme. You can add any employer-specific requirements in Appendix B.

If you have any questions or would like more information, please get in touch with BAPEQS secretariat. You can find their details through our website or email apeqs.sec@mod.gov.bn.

The BAPEQS Training Scheme

The BAPEQS Training Scheme helps employers support their staff through their initial professional development (IPD) and to a professional qualification.

IPD bridges the gap between education and professional qualification. It's the period of your career when you start to develop the special skills and professional approach needed to practice as a professional. Learning and getting experience at work helps trainees hold down positions of responsibility and make independent judgments.



This Training Scheme can be used by anyone who is applying for BAPEQS membership.

Trainees enter into a Training Agreement with their employer. This agreement formally sets out the responsibilities of the trainee, the employer and BAPEQS in the Training Scheme.

The supervising engineer (SE) plays a very important part in the scheme. Employers provide at least one SE to mentor trainees. The SE may also appoint delegated engineers (DEs) to carry out certain parts of their role.

Aims of the BAPEQS Training Scheme

The BAPEQS Training Scheme helps trainees:

- Get engineering knowledge, experience and competence, by providing opportunities to find and implement solutions to engineering problems
- Achieve the IPD attributes and complete the IPD stage of professional qualification
- Record how they've gained relevant knowledge, to support their application for the Professional Review
- Receive structured guidance and supervision from an SE and the BAPEQS Team so they can make the most of their training and, ultimately, achieve professional qualification quicker

We recommend using a Training Agreement, as it's usually the quickest way to achieve the IPD attributes.

After completing the Training Agreement, the trainee can apply for a Professional Review. It's important to be aware that completing IPD does not guarantee success at review. The trainee will then need to show full competence in the attributes to their reviewers through a report, interview and written exercise.

Setting up a Training Scheme

The lead SE is responsible for ensuring that their organisation is approved. This document sets out the requirements of the BAPEQS Training Scheme, but employers can also maintain their own training requirements in addition to those required by BAPEQS. These can be included in Appendix B.

Training Agreement

A training agreement is a formal agreement between the trainee and the organisation, and sets out the responsibilities and commitment of everyone involved in the Training Scheme.

The SE confirms (on behalf of the employer) that:

- The employer will provide the trainee with opportunities to complete the BAPEQS Training Scheme, either within the employing organisation and/or by secondment to other organisations
- The employer will provide a training structure to review the trainee's progress against the attributes – an initial assessment meeting, an annual review of progress and plans, and confirmation of completion

The trainee confirms that they will:

- Make full use of the opportunities available and their SE's advice to develop as a professional engineer
- Record evidence of their experience against the attributes using supporting documents as required by their SE or DE
- Maintain their membership of BAPEQS

There's no time limit on a Training Agreement but the employer has the right to terminate an agreement if the trainee is not performing to the required standard.

Getting started

There is a training agreement per trainee and it must be registered with BAPEQS and the appropriate fee paid. The trainee can complete the training agreement application form.

The SE and DE can access the trainee's records and sign-off achievement levels for each attribute as they progress.

Gaining experience

The main purpose of a Training Scheme is to provide trainees with a structured environment in which they can gain and record the experience they need, regardless of how long it takes.

Progress is recorded against a set of attributes. The attributes reflect the initial knowledge and skills required of a professionally qualified engineer.

The attributes are generic, which means they can be achieved in a range of ways by anyone working as an engineer. All work-based experience can be used as evidence towards completing IPD. Experience gained by part-time students or those who undertake work placements as part of their education can also be included.

Professional Engineer

- Knowledge - have a basic understanding and knowledge of the area of competence
- Experience - have achieved the attribute in different situations, working under supervision
- Have achieved the attribute in different situations, assisting others and working without supervision

As the trainee's experience increases, they will achieve the different levels for each attribute. To complete IPD they will need to achieve the ability level in all aspects of the attributes applicable.

Continuing to learn

We expect all members to maintain a commitment to continuing professional development (CPD) throughout their professional life.

Trainees are required to maintain a development action plan (DAP), which sets out the learning goals and priorities for the coming year. It enables trainees to plan their CPD, and meet personal, professional and technical goals. They should add completed training and development to a personal development record (PDR). Trainees are asked to provide their CPD records as part of the IPD annual appraisals.

Find out more about CPD in our guidance document.

Monitoring training

Keeping records is an important personal discipline and a requirement of professional practice. It also helps trainees progress more quickly.

Reports

The SE will advise what other reports they expect, although it's common practice to request a development report on a three-monthly basis. These reports will form the basis of the regular meeting with the SE or DE, and should cover activities during the period, what has been learned, and which of the attributes have been achieved, or partly achieved.

Where similar experience has been documented in a previous report, a development report might focus on a particular topic in more detail.

Development reports also give trainees the opportunity to practice writing about achievements and technical topics. The SE or DE will give valuable feedback on each report, including comments which can help to improve the next report. These reports will also provide background material for the Professional Review submission. The development record will be reviewed by the DE or SE on a quarterly basis, and annually by the SE. Appraisals can be used to discuss experience gained over the past period and agree expectations for the future.

Annual appraisal

The annual appraisal is carried out by the SE; to assess and record the trainee's progress towards achieving the attributes, as well as the quality of their reports and CPD. The appraisal should be used to set targets for the next 12 months. The trainee should be given guidance to make the most of the experience they get at work. It's important that the trainee's strengths are identified, and that strategies to overcome areas of weak performance or experience are considered and agreed.

The SE has the authority to cancel a Training Agreement if they think that the trainee is not committed to the scheme or has failed to reach the required standards. In this case, the SE should fill in the partial completion form for the trainee to record the trainee's experience so far. Completing this form will automatically inform BAPEQS that the training agreement is no longer active.

In addition to the formal requirements to meet on an annual basis, the SE should always be available to meet with the trainee or DE to discuss and resolve any issues of concern.

Training Review

The final appraisal is a review of the entire period of training, and is done by the SE. This Training Review should take place as soon as all the attributes have been signed off by the SE. The Training Review is the last stage of the Training Agreement and ensures that the trainee has:

- Achieved the attributes required
- Completed the development reports (where required by the SE)
- Maintained the development action plan and personal development record and achieved the minimum number of hours of CPD needed

The trainee and SE should agree that these requirements have been met and fill out the training completion form. The trainee needs to notify BAPEQS Review Team when this has been done so that they can verify the completion. BAPEQS Review Team may want to meet with the trainee before adding their comments and registering the training agreement completion with BAPEQS. This process may take up to eight weeks.

A Professional Review application will be rejected if the training agreement completion hasn't been registered with BAPEQS.

Transferring Training Agreements between employers

If a trainee leaves an employer before completing their Training Agreement, the progress they've made should be recorded by the SE as a 'partial completion'.

The trainee may then either:

- Transfer the agreement to another approved employer (see below)
- Transfer to mentor-supported training
- Self-manage the remainder of the IPD and, when ready, apply for a Career Appraisal

To transfer the agreement, the trainee needs to fill out a Training Agreement transfer form .

Sources of help

Supervising engineers (SE) and delegated engineers (DE)

The SE has overall responsibility for training and will formally review progress at least once a year. Sometimes an SE will appoint a DE to undertake quarterly reviews. The SE or DE must have regular contact with the trainee so they can mentor them effectively between the formal annual appraisals.

SEs and DEs should be familiar with the purpose of the Training Scheme and the requirements of the Professional Review, at all grades. They're also expected to help the trainee prepare for the Professional Review.

The SE is responsible for:

- Keeping up-to-date with the requirements of the Professional Reviews, and training
- Checking and approving the Training Agreement application and ensuring that the correct fee is paid
- Ensuring that trainees are given a copy of the Training Scheme and are briefed on using scheme
- Monitoring training throughout the Training Agreement and ensuring that trainees have the opportunity to achieve the attributes
- Providing written comments on CPD and development reports (if used), and carrying out a regular review (preferably quarterly) to assess and verify that the attributes are documented and achieved
- Carrying out the annual appraisal and recording the findings
- Maintaining contact with the BAPEQS Review Team and briefing them on trainees' progress and needs

The SE may also:

- Appoint, train and manage DEs
- Carry out an interim annual appraisal or complete a partial completion certificate, if the trainee is about to leave their employer

BAPEQS responsibilities

We have a duty to:

- Maintain central records of Training Schemes, individual memberships and Training Agreements
- Give advice and guidance to SEs, DEs and employer's training staff
- Provide access to a BAPEQS Review Team who will:
 - Meet SEs and trainees periodically
 - Provide opportunities for trainees to speak confidentially, if necessary, about any concerns or issues
 - Provide feedback to the SE on trainees' progress and recommend if any action is needed
 - Register the completion of the Training Agreement after achievement of the attributes has been verified

The SE should contact the BAPEQS Review Team with any queries about training or BAPEQS.

The BAPEQS Review Team is responsible for ensuring that the training is as effective as possible, in the short and long term. This involves approving and supporting the SE, as well as monitoring the organisation's and trainee's commitment to the Training Scheme. If that commitment is lacking, BAPEQS staff may, after due warning, recommend to the Professional Development Panel that an organisation is removed from the list of approved employers.

Guidance note 1: Setting up an BAPEQS Training Scheme

Employers who wish to set up a BAPEQS Training Scheme should decide who will be their lead supervising engineer (SE). It's preferable that the SE is a BAPEQS member, although it's not essential. As well as having overall responsibility for running the scheme, they will mentor the trainees. Each SE shouldn't be responsible for more than six trainees (or 10 if they have one or more DEs).

Choosing a supervising engineer (SE)

The SE should:

- Want to be a mentor
- Have a position in an organisation which allows them to help the trainee get the workplace experience they need
- Be able to influence senior people within the organisation, if they're not employed by the organisation

Companies can have as many SEs as they want, providing that they've all been approved by a-BAPEQS Review Team. Additional SEs can be added at any time but there must be at least one nominated as part of the Training Scheme application.

The application

The employer's Training Scheme application will consist of:

- An application for the nominated person to become an SE
- The proposed SE's CV and CPD records

Once a scheme and SE have been approved, SEs enter into an agreement with trainees, which is then registered with BAPEQS.

Guidance note 2: Setting up a Training Agreement

The Training Agreement is a formal agreement between the trainee and the employer. It sets out the responsibilities of the trainee and employer and the commitments they make to the training.

Each Training Agreement between an SE and trainee must be registered with BAPEQS

Before entering into a Training Agreement, the SE should ensure that the trainee is eligible to register with BAPEQS. They should also check that they have, or are working towards, the required academic qualifications they hope to achieve.

Before applying for a Training Agreement, trainees should check:

- That their employer and SE have been approved by BAPEQS
- That their employer is willing to register them onto their training scheme and willing to provide an SE

Trainees can apply for a Training Agreement by submitting an application form depending on the system used by their employer.

The training can start before the application is submitted as long as the BAPEQS Review Team agrees, and provided the training done so far has been supervised by an SE.

Trainees must put their work address and work email address on the application.

The trainee will receive an email, which is copied to the SE, confirming that the agreement has been registered. They can then start recording their experience. These records will also be available to their SE.

If the SE decides to appoint a delegated engineer (DE), the trainee will need to get the DE's BAPEQS membership number and register them.

The SE should brief the new trainee on the requirements of the BAPEQS Training Scheme and any additional employer requirements. They should also devise an outline training plan and explain the importance of continuing professional development (CPD) records. Any experience that the trainee has gained before the training scheme can also contribute to their IPD.

When a new trainee transfers from another employer, the SE should review the training record, including any partial completion. If there are any gaps in the training record these should be explained and documented. This may require contact with the previous SE and additional meetings between the SE and the trainee. These meetings may be recorded as an annual appraisal referenced under an attribute.

Guidance note 3: Your role as a supervising engineer (SE)

The SE is personally and professionally accountable to BAPEQS for carrying out their responsibilities under the training scheme. You're responsible for controlling, coordinating and planning the trainee's initial professional development, and for making sure they get the necessary understanding, knowledge and experience.

Even though they may have been nominated by their employer, SEs are primarily responsible to the profession. Therefore, you must be in a position to manage conflicts between the needs of the employer and the needs of the trainee to achieve the attributes, and to ensure sufficient resources are available for training.

You're the key to balancing the needs of the trainee and the demands of their workload.

You and the DE should aim to get the best out of the trainee by:

- Creating an environment of reflective learning, and giving the trainee feedback
- Continuously challenging them to achieve more
- Making sure their existing skills are used in a cost-effective way
- Identifying opportunities which are mutually beneficial and rewarding
- Making trainees feel secure in tackling demanding new roles
- Providing support and encouragement

As their SE, the trainee should see you as a role model and emulate your professional behaviour. You must be approachable, accessible, and actively interested and committed to the trainee's development.

You have to show BAPEQS evidence of the trainees' development, and are responsible for:

- Understanding the aims of the training and being familiar with the criteria of reviews
- Fulfilling the requirements of the BAPEQS Training Scheme and, in particular, knowing how the attributes are likely to be achieved within your organisation
- Validating continuing professional development (CPD) records. This involves assessing the benefits that have been gained, not merely certifying attendance

Unless you're well supported by a system of DEs, you shouldn't be responsible for more than six trainees. If you appoint one or more DEs, you can be responsible for up to 10 trainees. You divide the mentoring role between yourself and the DE. Generally, the DE provides day-to-day support for the trainees and helps them to achieve their potential. DEs are normally responsible for carrying out a progress review every three months, assessing progress, and reporting back to the SE.

Monitoring

The trainees' progress should be reviewed approximately every three months. This can be carried out by either the DE or SE. Any reports can be reviewed and progress towards achieving attributes recorded. The trainee's record of attributes is a working document and should include comments as appropriate. It's not included in the Professional Review application.

You should formally review the trainees' progress at least once a year. This annual appraisal should assess past performance and plan for the future. The review should:

- Assess progress and performance against the expected professional attribute standards
- Assess the trainees' CPD records. This includes checking that a sufficient amount of CPD has been undertaken, that a good mix of topics has been covered and that the full benefit of the training has been achieved
- Review training and development needs for the future
- Assess the effectiveness of the support and mentoring roles provided by others, such as DEs
- Plan the next steps

You should record the outcome of the annual appraisal discussion. The record should not simply list activities or include bland statements such as "a satisfactory year".

The SE should address the wider issues of the trainee's experience and knowledge, encouraging them to see the 'bigger picture' – developing the required attributes as well as scrutinising how the trainee claims to have achieved them.

If any gaps occur in the training you should record them and explain why they've occurred. You should also make sure that each year of the Training Agreement is accounted for. This will help complete the training record.

Training Review

Once you're satisfied that the trainee has completed their IPD, you need to fill out the Training Review.

The local BAPEQS Review Team should then be informed so that they can confirm the completion of the Training Agreement. Often the trainee meets the review team before the Training Agreement is registered as complete – you should allow six-eight weeks for this process.

Once the Training Agreement is complete, you should continue to advise and support the trainee as they prepare for the Professional Review. You should review the trainee's submission documents and help them prepare for the Professional Review – the report, presentation, interview and written exercise. Usually, SEs also sponsor their trainee's Professional Review application.

Transfer of Training Agreement

If a trainee leaves their employer part way through their Training Agreement, you should complete a partial completion form. This records the trainee's progress and will help whoever supports or assesses them in the future. It also notifies BAPEQS that the trainee is leaving their employers training scheme.

If the trainee then joins another BAPEQS approved employer, they can be registered on the new by filling in a Training Agreement transfer form.

Becoming an SE

If you'd like to be an SE, you should complete an application form and send it, together with a CV and CPD records, to your BAPEQS Review Team. The BAPEQS Review Team will arrange a meeting or briefing session to explain the role, and will also assess your application.

You'll receive an email which lets you know you've been approved. You should let BAPEQS know whenever new trainees transfer to you, by emailing their names to apeqs@mod.gov.bn. New trainees will have to register their Training Agreement in the usual way (see guidance note 2).

SEs and DEs are expected to attend training at least once every two years. And, to set an example to your trainees, you're expected to keep your CPD records up to date.

If you leave your employer or don't have any trainees for two years or more, you'll be removed from the list of SEs and will have to re-apply before taking on the role again.

Guidance note 4: Your role as a delegated engineer (DE)

Delegated engineers (DE) carry out routine reviews of a trainees' progress towards achieving the attributes. The DE is responsible for the day-to-day mentoring of the trainee within the structure defined by the Training Scheme and the SE.

The SE is responsible for choosing DEs and should make sure all DEs are fully briefed and trained for the role. DEs are particularly useful where there are a large number of trainees or where the trainee and SE are not in the same location.

The SE divides those responsibilities which can be delegated between themselves and the DE. Generally, as a DE, you will support and mentor the trainee from day to day, to help them achieve their potential. In many cases, you'll carry out the quarterly review of the trainee's progress, review the entries they have made and record your assessment.

You should be available and accessible to trainees, and show interest and commitment to their development. Your role is to guide, inspire and assist the trainee through their initial professional development.

The SE is responsible for formally assessing the effectiveness of the training and the development of the trainee against the attributes. This is done by following annual appraisals and the Training Review, which takes place at the end of the agreement.

The trainee should see you as a role model and emulate your professional behaviour. You must be approachable, accessible and actively interested and committed to the trainee's development.

Appointment of a delegated engineer

DEs are appointed by the SE and the trainee registers their DE. The SE is responsible for briefing you and keeping you up-to-date with changes in our requirements. However, you're welcome to attend any SE and mentor training that we provide.

Guidance note 5: Your role as a trainee

The BAPEQS Training Scheme helps you get the experience you need to become a professionally qualified member. You need to record your experience against a number of attributes that are relevant.

Your supervising engineer – possibly assisted by a delegated engineer – will guide you through the training scheme. You can find out more about their roles in guidance notes 3 and 4.

Having an SE is one of the main advantages of using a training scheme, because you have someone to guide you and to call on for advice. The SE can also make sure you get the experience you need at work, and can help you plan what you need to do next.

You should also aim to meet with BAPEQS Review Team at least twice during the course of the training agreement. They'll discuss your progress and provide any advice and guidance you may need.

Gaining experience

It's a good idea to draw up an outline training timetable with your SE. However, this will need to be regularly reviewed to reflect when opportunities to complete training in the workplace arise. The training scheme works best if you and the SE set effective goals and monitor your progress.

If you've gained some relevant experience before starting the training agreement, you can put it towards achieving the attributes, by recording it. Your SE will validate the evidence.

You can expect to be supervised, instructed and guided in your work by experienced engineers. They'll help make sure that the training opportunities you get contribute to projects in the workplace as well as the achievement of IPD attributes.

However, you must take the initiative with your training. For example, if you think you need more experience to complete a particular attribute, it's up to you to speak to your line manager or SE to arrange it. If you can't get the experience you need within the department you work in, you could be seconded to a different department or another suitable organisation, as long as it's been approved by your SE or DE.

You should record what you've done and learnt against the attributes. You can provide your SE and DE with additional evidence.

Continuing professional development (CPD)

You'll learn a lot very quickly at the start of your career so it's important to start recording it as CPD as soon as possible.

You're expected to take advantage of all CPD opportunities and to find other ways to develop, beyond the minimum requirements. These could include promoting corporate strategy and helping raise the profile of engineering as a profession – by visiting local schools and universities, for example. You can discuss and plan this with your SE or DE. Activities outside of work (or even outside engineering) can also contribute to CPD.

Reports and reviews

You should meet with your SE or DE every quarter. Normally, you'll be asked to produce a report, summarising your experience and what you've learnt in the period. You might include examples of your work, photos and other relevant material with this report. You should also record the experience you've gained against the attributes. Your SE and DE will have access to this system and will be able to assess your achievements as you go. Your BAPEQS Review Team will also be able to review your progress.

Annual appraisal

The annual appraisal is a formal assessment of your progress during the year, and must be carried out by your SE. The discussion will be based on your records and reports which you've produced during the year including:

- Detailed evidence of how you've achieved the IPD attributes and certified by the SE (or DE if appointed)
- Development action plan and personal development record for CPD
- Development reports (as required by the SE), building into a personal development portfolio
- Photographs, illustrations, examples of your own work and other material, which is helpful to recall experience

The purpose of the appraisal is to help you:

- Monitor and recognise the development of specific talents
- Identify and explore ways to fill gaps in your experience or expertise
- Discuss ways you can contribute to your organisation and the profession
- Monitor and plan progress towards the Professional Review

Training Review

Ultimately, it's up to you how long it takes to become professionally qualified. Once your SE is satisfied that you've achieved the required attributes, your Training Agreement completion can be recorded following a Training Review. You'll then need to contact your BAPEQS Review Team so that they can review and register the completion of the Training Agreement.

The format of this final review will depend on your personal circumstances. Your SE will use professional judgment to decide whether you've completed the Training Agreement to the required standards. You'll then need to contact your BAPEQS Review Team so that they can evaluate your experience and verify your completion certificate. You should allow up to eight weeks for this review.

As well as an overall review of your achievements, the Training Review should be used as an opportunity to plan for the forthcoming Professional Review. Your SE should advise you on your submission, review your documents and might also carry out a 'mock review' as practice.

Appendix A – Definitions

Attributes – The abilities someone must have to become a BAPEQS member. Trainees must show they've achieved the attributes during their initial professional development and at the Professional Review. There are nine attributes.

Delegated engineer (DE) – An individual (normally a professionally qualified BAPEQS member) who has been given responsibility, by a supervising engineer, to mentor trainees on a day-to-day basis. The DE may not necessarily be the trainee's line manager. For trainees seconded to another organisation, this will be an individual who has at least as much responsibility as the trainee's line manager. Normally a DE should not have more than three trainees to supervise.

BAPEQS-approved employer – Organisations which have been approved by BAPEQS to operate the BAPEQS Training Scheme. The employer provides their trainees with the opportunity and support to gain the knowledge and experience they need to complete their IPD.

BAPEQS Review Team – BAPEQS employees, who provide guidance on becoming professionally qualified with BAPEQS. They also help set up and monitor BAPEQS Training Schemes, approve supervising engineers (SEs), and verify the completion of Training Agreements.

BAPEQS Training Scheme – A structured training programme used by employers to help trainees get the experience and skills they need to qualify as professional engineers. An important part of the scheme is the mentoring trainees get from a supervising engineer (and a delegated engineer if applicable), who is provided by their employer. Trainees' progress on the scheme is recorded and measured.

Initial professional development (IPD) – The stage in a trainee's career when they get the experience, special skills and professional approach they need to practice as an engineer. It bridges the gap between their education and professional qualifications. For trainees on an BAPEQS Training Scheme, IPD is recorded and assessed.

Membership Recruitment Teams (MRTs) – Teams of BAPEQS employees based cross the UK, who give advice and guidance on all aspects of professional development.

Supervising engineer (SE) – An individual approved by BAPEQS and provided by employers to mentor trainees. They will preferably be a professionally qualified BAPEQS member, but it's not mandatory. They will have a good understanding of the process and standards needed to become professionally qualified with BAPEQS, and an active level of personal contact with the trainee. They also make sure trainees get the experience they need.

Trainee – An individual who develops and trains under BAPEQS Training Agreement, and in accordance with the BAPEQS Training Scheme.

Training Agreement – a formal agreement between an employer and a trainee. The employer agrees to provide support and experience so that the trainee can complete their IPD. The trainee agrees to work diligently to gain experience and document it as required by the BAPEQS and their Supervising Engineer