BS ISO 29990:2010

BSI Standards Publication

Learning services for non-formal education and training — Basic requirements for service providers

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National foreword

This British Standard is the UK implementation of ISO 29990:2010.

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A list of organizations represented on this committee can be obtained on request to its secretary.

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INTERNATIONAL STANDARD

ISO
29990

Learning services for non-formal education and training — Basic requirements for service providers

Services de formation dans le cadre de l'éducation et de la formation non formelles — Exigences de base pour les prestataires de services

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

ISO 29990 was prepared by Technical Committee ISO/TC 232, *Learning services for non-formal education and training*.

Introduction

The objective of this International Standard is to provide a generic model for quality professional practice and performance, and a common reference for learning service providers (LSPs) and their clients in the design, development and delivery of non-formal education, training and development. This International Standard uses the term "learning services" rather than "training" in order to encourage a focus on the learner and the results of the process, and to emphasize the full range of options available for delivering learning services.

This International Standard focuses on the competency of LSPs. It is intended to assist organizations and individuals to select an LSP who will meet the organization's needs and expectations for competency and capability development and can be used to certify LSPs.

This International Standard shares some similarities with many of the management system standards published by ISO, particularly ISO 9001. As an example, a comparison of the content of this International Standard with that of ISO 9001:2008 is given in Annex E.

Learning services for non-formal education and training — Basic requirements for service providers

1 Scope

This International Standard specifies basic requirements for providers of learning services in non-formal education and training.

NOTE 1   In cases where the learning service provider is part of an organization that delivers products (goods and services) in addition to learning services, this International Standard only applies to the unit providing the learning services.

NOTE 2   Examples of non-formal education and training could include vocational training, life-long learning and in-company training (either outsourced or in-house).

2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

2.1
associate
⟨learning services⟩ entity or person not employed by the learning service provider, but working under its auspices to provide learning services

NOTE   An associate is not a staff member of the learning service provider.

EXAMPLE   Organizations or independent contractors, such as instructors, instructional designers, evaluators, project managers, or career counsellors.

2.2
award
⟨learning services⟩ designation given by a learning service provider to a learner, in order to indicate a level of performance or attainment, or the completion of a learning programme

2.3
business plan
plan of action designed to achieve business goals

2.4
competency
⟨learning services⟩ knowledge, understanding, skill or attitude that is observable or measurable, or both observable and measurable, which is applied and mastered in a given work situation and in professional development or in personal development, or in both professional and personal development

2.5
continuous professional development
intentional enhancement of professional knowledge or of professional competency

2.6
curriculum
⟨learning services⟩ plan of study prepared by the learning service provider which describes the aims, content, learning outcomes, teaching and learning methods, assessment processes, etc., relating to a learning service

2.7
evaluation of learning
normative approach to analysing the learning process, or learning outcomes measured against the learning goals

2.8
facilitator
⟨learning services⟩ person who works with learners to assist them with learning

NOTE   A facilitator is also often referred to as a teacher, a trainer, a coach, a tutor or a mentor.

2.9
interested party
⟨learning services⟩ individual, group or organization with a direct or indirect interest in the learning service, including its management and outcomes, or the processes involved, or both

2.10
key process
⟨learning services⟩ process essential to the learning service and the management of it

2.11
learner
person engaged in learning

2.12
learning
acquiring knowledge, behaviour, skills, values, preferences or understanding

2.13
learning service
processes or sequence of activities designed to enable learning

2.14
learning service provider
LSP
organization of any size or an individual providing learning services in the field of non-formal education and training, including all associates involved in the provision of the learning service

2.15
non-formal education
⟨learning services⟩ organized educational activity outside established recognized formal systems of elementary, secondary or higher education

EXAMPLE   Vocational training; life-long learning; in-company training (either outsourced or in-house).

2.16
quality policy
overall intentions and direction of an organization related to quality as formally expressed by top management

NOTE 1   Generally the quality policy is consistent with the overall policy of the organization and provides a framework for the setting of quality objectives.

NOTE 2   Quality management principles presented in ISO 9000:2005 can form a basis for the establishment of a quality policy.

[ISO 9000:2005, definition 3.2.4]

2

2.17
sponsor
⟨learning services⟩ organization or individual that provides financial or other support for the learner, or that has a vested interest in the outcome of the learning

NOTE   This includes corporations, government agencies, relatives, etc.

2.18
transfer of learning
application of what has been learned during the learning service to other situations

3   Learning services

3.1   Determining learning needs

3.1.1   General

Prior to offering learning services, and in order to orientate these effectively, the learning service provider (LSP) shall ensure that a learning needs analysis is conducted.

NOTE   Where relevant, the LSP will need to take account of national frameworks for qualification standards or progression within the area or sector.

3.1.2   Needs of interested parties

Before providing the learning service, the LSP shall ensure that:

a)   in terms of a qualification analysis, information is obtained about learners' relevant education and training history and prior learning, including qualifications and credentials awarded to them, and that this information is obtained and used with legitimate consent;

b)   specific aims, wishes, goals and requirements of interested parties in undertaking or commissioning the learning service are determined;

c)   where relevant and feasible, learners are provided with the support they need in assessing their own learning needs and goals;

d)   any needs relating to language, culture, literacy, or other special needs relating to disability are identified [e.g. see web content accessibility guidelines (WCAG)];

e)   relevant interested parties are consulted to determine how they expect the skills, competencies and awareness developed as a result of the learning service to transfer to the learners' work-related tasks and responsibilities, and about what the sponsor will consider to be indicators of success;

f)   an agreement is reached and recorded with the sponsor on the learning service to be provided.

3.1.3   Learning content and process

The LSP shall ensure that:

a)   the learning content and the learning process take into account the needs of any interested party;

b)   available means and information are used to effectively analyse issues arising from the specific learning content and process (e.g. prerequisite skills, specific requirements for the learner);

c)   the learning methods and materials to be used are appropriate, accurate in terms of their content, and sufficient to meet the stated goals;

d)   the learning content and process take into account learning outcomes.

3.2   Design of the learning services

3.2.1   Specification of the aims and scope of the learning services

The LSP shall ensure that the scope, specific aims and planned outcomes of the learning service that is selected to meet the needs of interested parties, as well as the learning methods to be used, are clearly specified and communicated to relevant interested parties.

3.2.2   Specification of means of supporting and monitoring the transfer of learning

The LSP shall consider relevant interested parties when determining and planning the ways in which learning will be facilitated and supported, so as to ensure that the transfer of learning is assessed, monitored, evaluated and documented appropriately.

3.2.3   Curriculum planning

The LSP shall:

a)   develop and document a curriculum and means of evaluation that reflect and are appropriate to the aims and learning outcomes specified;

b)   select methods of learning, including autonomous learning, which

   1)   respond to the aims and requirements of the curriculum;

   2)   are appropriate for the learners;

   3)   take into account the various needs of individual learners; and

   4)   take advantage, as appropriate, of the group's potential to provide resources and support for individual and collective learning;

c)   clearly specify the role and responsibilities of the interested parties, including the LSP itself, when delivering the learning services, and when monitoring and evaluating transfer of learning.

3.3   Provision of learning services

3.3.1   Information and orientation

Commencing with, or prior to, delivery of the learning service, the LSP shall notify the learners and the sponsors and, when appropriate, check their understanding of:

a)   the purpose(s), format and content of the learning services being provided, including the instruments and criteria to be used for evaluation, and the nature of the award or report to be issued upon completion;

b)   the learners' commitments and responsibilities;

c)   the LSP's commitments and responsibilities to the learner;

d)   the procedures to be used in case of dissatisfaction of any interested party, or disagreement between any interested party and the LSP;

e)   support for learning, such as library access, hotline, counselling services, computer access, mentoring, etc.;

f)   methods and schedule for evaluation;

g)   any prerequisites, technical or otherwise, such as required skills, qualifications and professional experience.

Commencing with, or prior to, delivery of the learning service, the LSP shall notify those financing the service of the charges for which they are responsible, such as tuition fees, examination fees and the purchase of learning materials.

3.3.2   Ensuring availability and accessibility of learning resources

The LSP shall ensure that:

a)   all resources as defined in the curriculum are available;

b)   all facilitators responsible for delivering the learning services have these learning resources available and are trained in their use;

c)   all resources as defined in the curriculum can be accessed by the learners.

3.3.3   The learning environment

In cases where the LSP is responsible for providing or selecting the learning environment, the LSP shall ensure that it is conducive to learning. If the LSP does not have control over the learning environment, the LSP shall specify minimum requirements for it.

NOTE 1   The learning environment includes facilities, equipment, learning materials, etc.

NOTE 2   See also 4.8 on the allocation of resources when considering learning environment, because the two aspects are closely related.

3.4   Monitoring the delivery of the learning services

The LSP shall ensure that feedback is requested from learners on the methods and resources used, as well as their effectiveness in achieving the agreed learning outcomes.

NOTE   For feedback from other interested parties, see 4.10.

3.5   Evaluation carried out by learning service providers

3.5.1   Evaluation goals and scope

The LSP shall:

a)   describe general and specific evaluation goals and the assumed scope of the evaluation;

b)   ensure that all evaluation methods and means employed by the LSP, including their schedule and rationale, are recorded;

c)   ensure that the evaluation procedures are planned, selected and conducted in order to meet the intended objectives, and that they can be implemented in such a way as to provide value to the various interested parties;

d)   ensure the evaluation is conducted legally and ethically;

e)   ensure the information collected for LSP evaluations is:

   1)   focused and sufficiently comprehensive to enable evaluation questions to be fully answered and the needs of learners to be properly addressed;

2) systematically and accurately analysed;

3) valid, reliable and meaningful.

The LSP shall take reasonable steps to reduce bias in evaluations.

3.5.2   Evaluation of learning

This subclause addresses the requirements of the LSP with respect to measuring and analysing the extent to which the individual learners are achieving, or have achieved, the learning outcomes of the learning service provided.

The LSP shall ensure that:

a) access to results of LSP evaluation of the learner is given only to those with established legitimate consent to view the information, and that these results are in a format that facilitates the transportability of the evaluation;

b) individual learners with difficulties, and those who require specific assistance with learning in order to achieve the agreed learning outcomes, can be referred to experts in the relevant field.

3.5.3   Evaluation of the learning service

This subclause addresses the requirements of the LSP with respect to measuring the effectiveness and quality of the learning service itself.

The LSP shall ensure that:

a) the interested parties involved in, or affected by, the evaluation are identified;

b) the persons conducting the evaluation are competent and objective;

c) evaluation reports are transparent and clearly describe the learning service, the learning service objectives, the findings, and also the perspectives, procedures and rationale used to interpret the findings;

d) the context (e.g. learning environment) in which the learning service is provided is examined in enough detail to enable likely influences on the learning service to be identified.

4   Management of the learning service provider

4.1   General management requirements

A commitment to this International Standard shall be demonstrated at the highest level of leadership within the LSP.

The LSP shall establish and document a management system and ensure that it is understood, implemented, maintained and reviewed. The LSP shall designate a member of the management team to be responsible for the management system.

The LSP's application of, and compliance with, the requirements of this International Standard shall be documented. These documents shall be accessible to all relevant personnel. Procedures shall be established to ensure the transparency, accuracy, relevance, circulation and security of the documentation.

The LSP shall establish procedures for retaining records for a period consistent with its contractual and legal obligations (e.g. see ISO 15489). Access to these records shall be consistent with the confidentiality arrangements established by the LSP.

4.2 Strategy and business management

In implementing this International Standard, the LSP shall draw up and document a business plan in accordance with generally accepted business planning practices. The business plan shall include a strategy and business objectives, as well as a description of management structures, key processes and the LSP's quality policy.

Annex A outlines the usual content of a business plan.

4.3 Management review

The LSP shall establish procedures to review its management system at planned intervals, in order to ensure its continuing suitability, adequacy and effectiveness, including the stated policies and objectives related to the fulfilment of this International Standard. These reviews shall be conducted at intervals appropriate to the context.

Annex B outlines the type of information that is generally included in the input to the management review.

4.4 Preventive actions and corrective actions

The LSP shall establish procedures for identifying and managing nonconformities in the management system, e.g. the Plan-Do-Check-Act (PDCA) cycle. The LSP shall also, where necessary, take actions to eliminate the causes of nonconformities, in order to prevent recurrence. Preventive actions shall be sufficient to eliminate the causes of potential nonconformities. Corrective actions shall be appropriate to the impact of the problems encountered.

Annex C outlines the type of preventive actions and corrective actions that are generally taken.

4.5 Financial management and risk management

The LSP shall have in place and shall document the following in order to ensure its business continuity:

a) an appropriate financial management system;

b) a system for identifying, assessing and managing risk.

4.6 Human resources management

4.6.1 Competencies of the LSP's staff and associates

The LSP shall ensure that any staff and associates have the core competencies needed to carry out the processes outlined in Clause 3 and this clause within their job descriptions, and that these competencies are maintained.

The LSP should provide job descriptions that refer to the core competencies required, which shall be reviewed at appropriate intervals.

NOTE   Annex D provides further information to illustrate some of the core competencies referred to in this International Standard.

4.6.2 Evaluation of LSP competencies, performance management, and professional development

This subclause addresses the requirements with respect to measuring the degree to which members of staff or associates of the LSP have the competencies required to effectively carry out the activities with which they are charged, and managing the performance of staff and associates.

The LSP shall ensure that:

a) the competencies of each member of staff or associate providing learning services under its auspices are assessed or reviewed in relation to their job description, and that the assessments or reviews are documented;

b) systems are developed and implemented for managing, appraising and providing feedback on the competence and performance of staff;

   NOTE This can be done by various means, including regular observation of teaching and training sessions, and feedback to instructors on these observations.

c) feedback is obtained from staff and associates on their motivation and job satisfaction;

d) staff and associates undertake continuous professional development, and the impact of this is evaluated and documented;

e) the evaluation procedures that are chosen or developed and implemented provide valid and reliable information about the competencies of the team providing learning services;

f) all aspects of these processes are consistent with relevant legislation and with the basic principles of fairness and human rights, and they are regularly reviewed.

4.7 Communication management (internal/external)

The LSP shall, where appropriate, implement procedures to inform and consult with staff and associates on issues which may have a direct impact on them, and shall facilitate two-way communication.

The LSP should provide opportunities for communication amongst staff and associates.

4.8 Allocation of resources

The LSP shall ensure that the necessary staff and associates and learning resources are selected and deployed, taking into account any specific needs, and that the learning resources are maintained.

NOTE See also 3.3.2 and 3.3.3.

EXAMPLE Personnel; learning materials; equipment, including information technology infrastructure [for special needs, e.g. see web content accessibility guidelines (WCAG)]; working and learning environments; equipment for learning services provided away from the LSP's premises; catalogues of educational technologies and of special needs; career counselling services.

4.9 Internal audits

The LSP shall establish procedures for internal audits, in order to verify that it complies with this International Standard and that the management system is being effectively implemented and maintained.

An audit programme shall be planned which takes into account the relative importance of the processes and areas to be audited, as well as the results of previous audits. This audit programme shall cover all of the processes over, at most, a period of 36 months.

The LSP shall ensure that:

a) internal audits are conducted by suitably qualified persons with knowledge of auditing and the requirements of this International Standard;

b) auditors do not audit their own work;

c) the staff responsible for each area audited are informed of the outcome of the audit;

d) any opportunities for improvement are identified; and

e) any actions resulting from internal audits are taken in a timely and appropriate manner.

4.10 Feedback from interested parties

The LSP shall have in place and shall utilize systems for gathering feedback from interested parties on the learning services provided, and for analysing, responding to and, where appropriate, acting upon it.

The LSP shall have in place a system for handling complaints and appeals, and shall make this known to its interested parties.

Annex A
(informative)

Business plan content

A business plan usually covers the following areas:

a) vision and mission: the LSP documents its vision and mission, including how it supports the value of learning and the fair treatment of its interested parties;

b) development and regular assessment of strategy: the LSP specifies its strategy and the revision period, and demonstrates that these periodic reviews are conducted;

c) quality policy: the LSP documents its quality and quality control policy;

d) business and quality objectives: the LSP

   1) documents its business objectives;

   2) records actual implementation of improvement projects within the organization, including timeframes;

   3) specifies measurable and verifiable objectives for improvement projects within the organization, linking them to its quality policy;

e) market analysis: the LSP periodically reviews and documents the demand for learning services;

f) organizational and operational structure, including business areas and cooperations: the LSP documents its organizational structure and ensures that this structure is communicated to all staff members and associates;

g) identification and design of key processes: the LSP provides evidence of the design of key processes, including needs analyses, design, delivery and evaluation;

h) associates: the LSP plans and documents how it integrates the associates into their work.

Annex B
(informative)

Information for management system reviews

The information required for management system reviews should include:

a)   the results of internal and external audits;

b)   feedback from interested parties related to compliance with this International Standard;

c)   the status of preventive actions and corrective actions;

d)   follow-up actions from previous management reviews;

e)   the fulfilment of objectives;

f)   any changes that could affect the management system;

g)   any appeals and complaints, as well as the handling of them;

h)   identification and resolution of any nonconformities in its management system;

i)   the results of evaluation of the learning services.

The management review should lead to decisions and actions about:

—   improving the effectiveness of the management system and its processes;

—   improving compliance with this International Standard;

—   the resources needed for effective delivery of the learning services.

Annex C
(informative)

Preventive actions and corrective actions

Preventive actions and corrective actions include:

a)   identifying nonconformities in the management system;

b)   determining the causes of nonconformity;

c)   preventing or correcting nonconformities, or preventing and correcting nonconformities;

d)   evaluating the need for actions in order to ensure that nonconformities do not recur;

e)   determining and implementing the actions needed in a timely manner;

f)   recording the results of actions taken;

g)   reviewing the effectiveness of corrective actions taken.

Annex D
(informative)

Examples of core competencies for learning service providers

The competencies are structured around three main headings that list basic competencies, as follows:

— **competencies related to the delivery of learning services**, which include:

   — applying learning theory;

   — applying learning methodology;

   — selecting and using learning support materials;

   — dealing with special needs and diversity;

   — evaluating learning;

   — being a subject matter expert;

   — developing curriculum;

   — identification of learning needs;

   — applying learning technology;

— **personal competencies**, which concern the individual's personal qualities as a facilitator, and include:

   — listening and communicating effectively;

   — making presentations;

   — motivating people;

   — facilitation;

   — managing conflicts;

   — continuous professional development;

   — using information technology effectively;

   — sensitivity to equality and diversity issues;

   — adherence to a code of conduct or statement of values;

   — intercultural competencies;

   — guiding, counselling and mentoring;

— **business competencies**, which concern the ability of the facilitator to link learning to clients' business objectives, and include:

— innovation and use of emerging technology;

— commercial acumen (planning, budgeting);

— management of interested parties;

— formulating and regulating learning policy;

— networking with interested parties, i.e. making connections and building relationships;

— management of business performance;

— understanding the ever-changing nature of work, i.e. on a social, technological, industrial, political and cultural level;

— using technology to manage communications;

— working on organizational development and effectiveness;

— learning administration.

Annex E
(informative)

Correspondence between ISO 29990:2010 and ISO 9001:2008

The purpose of this annex is to provide cross-references between this International Standard and ISO 9001:2008.

In Tables E.1 and E.2:

— the term "(heading only)" indicates that there is correspondence of the headings, but not of the contents;

— where the heading is in brackets followed by the term "General", a correspondence of the general description applies, rather than of specific points.

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Table E.2 — Correspondence between ISO 9001:2008 and ISO 29990:2010

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(Preventive action) General	8.5.3	4.4 Annex C	Preventive actions and corrective actions Preventive actions and corrective actions

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