

## Introduction

This handbook is designed to give organizations an overview of the CEWD Approved Course Provider program and detail the provider application process. Becoming a CEWD Approved Course Provider (ACP) grants organizations access to the coursework for the CEWD Energy Industry Fundamentals Certificate and grants their students exclusive access to earn the CEWD Energy Industry Fundamentals Certificate.

## About the Energy Industry Fundamentals Certificate

The purpose of the Energy Industry Fundamentals Certificate is to ensure potential workers gain an understanding of the energy industry as a prerequisite to occupation-specific training and gain an understanding of the careers available in the energy industry and the education and training to enter and advance in those careers.

The Energy Industry Fundamentals Certificate aligns with tiers 4 and 5 of the Energy Competency Model (see figure 1) developed by CEWD and the U.S. Department of Labor. As such, it covers such basics as emerging principles and concepts that impact the energy industry; compliance with safety and health procedures; how electric power and natural gas generation, transmission and distribution work; a range of entry-level energy careers; and “hot topics” in energy. The learning objectives covered by the Energy Industry Fundamentals Certificate curriculum is included in **Appendix A**.

**Figure 1: Energy Competency Model**



This program was created under a grant to CEWD from the Bill and Melinda Gates Foundation to help potential employees earn credentials that would lead them to careers in the energy industry.

To be awarded the certificate, a student must:

- 1) Complete the Energy Industry Fundamentals coursework through a CEWD Approved Course Provider;
- 2) Pay the \$30 assessment fee to CEWD (this fee may be paid by the ACP rather than the student; see **Appendix B**); and
- 3) Achieve a passing score of 68% on the CEWD Energy Industry Fundamentals Certificate comprehensive assessment. (see **Appendix B** for information on proctors).

The certificate will be provided by CEWD and dated to inform stakeholders of the predicted length of currency of the content of the certificate. Should an employer wish to verify a certificate holder's status, they can contact Certificate Program Coordinator Julie Strzempko at [julie@cewd.org](mailto:julie@cewd.org).

## Benefits of Becoming an Approved Course Provider

While the Energy Industry Fundamentals curriculum and course materials will be made available for any school to use, there are benefits only afforded to Approved Course Providers.

- Only course graduates of schools approved by CEWD as an Approved Course Provider of the Energy Industry Fundamentals Certificate will be eligible to earn the CEWD Energy Industry Fundamentals Certificate.
- Visibility through listing on CEWD's website as an Approved Course Provider for the CEWD Energy Industry Fundamentals Certificate.
- Authorization to use the official CEWD Approved Course Provider logo to promote affiliation and the program offering.

## Roles of CEWD and Approved Course Providers

The Center will update the Energy Industry Fundamentals Certificate curriculum and its associated supportive materials in response to changes in industry practices, regulations, and other influences. It will also administer the comprehensive assessment and issue certificates to students who have successfully completed the coursework and passed the assessment.

Educational institutions approved as Approved Course Providers will teach the coursework following a set of specific criteria approved by CEWD. ACPs are responsible for ensuring that all course content and delivery standards are met and that course material is taught as approved by CEWD. They ensure that their students successfully complete all course learning objectives and are prepared to take the CEWD comprehensive assessment. They remain accountable to CEWD for the courses and the conduct and qualifications of their instructors and other personnel. All correspondence between CEWD and ACPs will pass through the ACP Administrator.

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## Approval Process and Deadlines

The first step in pursuing Approved Course Provider (ACP) status is the submission of the Energy Industry Fundamentals Course Provider Application (see **Appendix D**) and the non-refundable application fee of \$50. Continuation of the approval status is dependent upon the annual submission of an updated report and successful participation in site visits, if applicable.

The application must be submitted at least two months prior to the planned course date to allow sufficient time for CEWD to review the application. Earlier submission is encouraged to allow time for schools to promote their approved status to students.



Once you've been approved to be an approved course provider, you will be able to use the logo shown to the left on your promotional materials. A camera-ready version will be provided.

You can also include the statement, "<Organization> has been approved by the Center for Energy Workforce Development as an Approved Course Provider for the Energy Industry Fundamentals course. Only students taking coursework from an approved course provider qualify to earn the Energy Industry Fundamentals Certificate from the Center for Energy Workforce Development."

## Approved Course Provider Criteria

To be approved as course providers, schools must document on the Approved Course Provider Application how they meet the following criteria:

### ***Be a Legitimate Educational Operation***

On Section 1 of the application, list the name of the organization, its tax identification number and identify the type of institution it is. Then, list contact information for the organization's primary contact to CEWD regarding the Approved Course Provider program.

### ***Have a Partner Utility***

On Section 2, list the utility with whom your organization has a partnership and its primary contact information.

All education providers must have a utility partnership in place to become an Approved Course Provider. This means, at a minimum, that the Provider has at least made contact with a local utility (utility does not need to be a CEWD member) to discuss the types of positions available (or that will become available) to students that earn the Energy Industry Fundamentals Certificate as well as get occupation-specific training. Aligning supply and demand is a key to the success of any training program that graduates students who find employment. Many high quality partnerships are in place in regions throughout the country where education providers work closely with their local energy companies.

### ***Have Qualified Instructors***

On Section 3, describe your instructors for the Energy Industry Fundamentals coursework. Include their names, employer, degree(s) and/or credential(s). Refer to **Appendix E** for CEWD's Instructor Profiles. If your instructors do not meet these qualifications, describe why you feel they are qualified to instruct this coursework.

### ***Have Incorporated Coursework within a Logical Sequence of Courses or Curriculum Appropriate to the Audience***

On Section 4 of the application, identify the audience and the format for delivery of the coursework. Then, describe how you are or are planning to sequence the courses and activities within a curriculum or how this will be sequenced as a stand-alone curriculum.

The course was developed with a traditional scheduling approach in mind, such as a semester course (community college) or year-long program (high school). While offering it in a bootcamp style is an option, it is not recommended given the technical nature of the material.

### ***Have the Resources (Facility, Human, Financial) Needed to Effectively Offer the Coursework***

On Section 5, describe the resources in place to support this coursework, including the facilities you will use and your personnel and financial resources in place to support the program.

### ***Have Fair and Equitable Policies and Procedures in Place***

On Section 6, briefly describe your policies and procedures in place for the items listed. Then, attach copies of the actual policies to your application. Refer to **Appendix F** for sample policies that you may use or adapt, if you do not have existing policies.

### ***Communicate Responsibly to Stakeholders***

On Section 7, briefly describe how you communicate to students the information listed on the application and identify the website URL, if applicable. Then attach the actual collateral materials to your application.

### ***Agree to Approved Course Provider Terms***

On Section 8, indicate your agreement to the terms by signature and printing your name, title and date. The individual listed here must be the ACP Administrator (the official representative from your organization to CEWD for this program).

Here is additional information on the terms provided; more detail will be shared to organizations upon achieving ACP status.

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- Agree to maintain practices consistent with the ASTM International *E2659: Standard Practice for Certificate Program*, according to guidance provided by CEWD.
- Must communicate adequate information to students before the program begins

In accordance with ASTM E2659, ACPs must communicate the following information in advance of their enrollment in the program:

- Standard course description:
  - Energy Industry Fundamentals provides a broad understanding of the electric and natural gas utility industry and the energy generation, transmission, and distribution infrastructure, commonly called the “largest machine in the world,” which forms the backbone for the industry. The course includes business models, regulations, types of energy and their conversion to useable energy such as electric power, how generated power is transmitted and distributed to the point of use, emerging technologies and the connection to careers in the energy industry.
- Learning outcomes
- Special requirements for participation in the course (if applicable)
- Qualifications of instructors
- The required passing score of 68% for a student to be issued the certificate and that individuals who have been issued the certificate are *certificate holders; they are not certified or licensed. You must also include the sentence “The bearer of the Energy Industry Fundamentals Certificate has a foundational knowledge and understanding of the utility industry.”*
- Comply with all applicable local, state, and federal regulations.

In accordance with ASTM E2659, ACPs must comply with all applicable regulations, most notably including providing reasonable accommodations to students with disabilities, when warranted.

- Teach the CEWD curriculum (can go beyond but must cover the learning outcomes of all but the optional modules – Modules 6 and 7)

Course Materials: Course materials are available free of charge for download. There is also free access to the distance learning version of the course if the program is to be taught remotely.

How to use materials: The course materials have been designed with a wide range of target audiences in mind. Therefore, there are many choices of hands-on activities within each module. While instructors are not expected to do all of the activities, they are expected to engage learners as much as possible. Energy Industry Fundamentals was built on this foundation and is not meant to be a lecture class.

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For the distance learning version of the course, it is highly encouraged to utilize the review and learning scenarios available for each module. This provides a unique opportunity for interaction, especially since labs are not available in this format. Module Quizzes: Students must complete the quizzes at the end of each module. It is the instructor's discretion on whether to use them towards the course grade.

Modules 6 and 7: These modules focus on energy careers and hot topics in the energy industry, which will be updated frequently as technology changes. They are available online only. The final course assessment will not include questions from either module.

Copyright: The Energy Industry Fundamentals materials are copyright by CEWD and the Center for Occupational Research and Development (CORD). Any use of materials, including reproduction, modification, distribution or republication, without the prior written consent of CEWD, is strictly prohibited.

Instructional Time: While the instructional time will vary, the course has been designed for approximately 130 hours of instructional time, to include hands-on activities.

- Submit an Annual Report of Program Status to document ongoing conformance to the ACP program's requirements.

ACPs will be required to submit an annual report to CEWD. The report form will be an abbreviated form of the initial application, focusing primarily on reporting of any changes to the ACP's program since the initial application or the last annual report. This form will be sent to ACP's on an annual basis.

- Agree to submit to optional site visits by CEWD, if determined necessary.  
CEWD may determine to conduct a site visit to any ACP, either as part of a random audit from all ACPs or in follow-up to complaints about a specific ACP. Should an audit be planned, dates will be determined jointly (i.e., it will not be a surprise visit).
- Follow required protocol for uploading student information for those who qualify to take the assessment. See **Appendix B** for more information.
- Provide CEWD with a compilation of student evaluation forms within 30 days upon the conclusion of the course using the form provided in **Appendix C**.
- Agree to CEWD ACP confidentiality and conflict of interest terms. In conformance to ASTM E2659, ACPs must agree in writing to the terms specified on the application.

## Appeals

Should an applicant be declined ACP status, the applicant is afforded an opportunity to appeal the decision in accordance with the following procedures.

An appeal must be made in writing to the CEWD Educational Consultant within thirty (30) days of receiving the determination being appealed. The written appeal must include the stated

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appeal, the reason for the appeal (including relevant supporting materials), and appellant's contact information.

When an appeal is received, the CEWD Educational Consultant shall convene a three-person Appeals Panel to consider the appeal, ensuring that no members of the Panel have actual or apparent conflicts of interest with the case at hand. The function of the Appeals Panel in a given case is to review the decision being appealed based on the record that was presented at the time of the determination. The appeal shall be considered within thirty (30) days. The CEWD Educational Consultant shall notify the appellant of appeal decisions within sixty (60) days from the Appeals Panel determination. Appeals Panel decisions shall be final.

## Suspension or Withdrawal of Approved Course Provider Status

There are circumstances under which CEWD may suspend or withdraw Approved Course Provider status. CEWD may suspend or withdraw Approved Course Provider status if the provider:

- Fails to deliver or maintain the program as it was approved by CEWD
- Fails to comply with stated program requirements
- Is involved in activity which is contrary to CEWD policy or is detrimental to the CEWD Energy Industry Fundamentals certificate program.

Should it be determined that the Approved Course Provider status is suspended or withdrawn, CEWD will notify the ACP Administrator of the suspension or withdrawal. The notice includes the following items of information:

- Reason for the suspension or withdrawal
- Effective date
- Terms

Suspensions or withdrawals of approval status may be appealed.

## Complaints

### *Resolution of Concerns*

Providers with concerns regarding the course, such as the content, format, etc., may wish to file a formal complaint.

### *Submission of Program Complaints*

A complaint shall be submitted in writing to the CEWD Educational Consultant and may be mailed, e-mailed, or faxed. The submission shall include sufficient objective evidence to substantiate the claims and allow for a decision to be made and the appropriate action to be taken. Dissatisfaction based on hearsay shall not be considered as a complaint. Only written complaints shall be considered. Anonymous complaints shall not be considered.

### *Staff Level Review*

The CEWD Educational Consultant shall serve as the first level of complaint and shall investigate the circumstances of any valid complaint and 1) determine and implement corrective

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action, 2) refer the complaint to a different suitable personnel member to determine and implement correction action, or 3) escalate it to an ad hoc Complaints Panel for review. If addressed by personnel, the Educational Consultant shall communicate the resolution to the complainant within a period of no longer than thirty (30) days.

#### *Ad hoc Complaints Panel Review*

If a complaint is found to warrant escalation, the CEWD Educational Consultant shall convene a three-person Appeals Panel to consider the complaint, ensuring that no members of the Panel have actual or apparent conflicts of interest with the case at hand. The complaint shall be considered within sixty (60) days. The Educational Consultant shall communicate the resolution to the complainant within a period of no longer than thirty (30) days.

#### *Appeal of Complaint Determinations*

The determination of personnel or the Appeals Panel is appealable, and the Appeals policy shall apply.

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# Appendix A

## Intended Learning Outcomes

### *Energy Industry Fundamentals Certificate Program*

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01.0 Demonstrate knowledge of the basic and emerging principles and concepts that impact the energy industry-- the student will be able to:

- 01.01 Explain the flow of energy from generation through distribution to the customer.
- 01.02 Discuss the history of the United States energy industry/infrastructure (refer to Energy Information Administration [www.eia.doe.gov](http://www.eia.doe.gov) ).
- 01.03 Identify the role and function of generation, transmission and distribution organizations.
- 01.04 Explains the role of regulatory bodies in the energy industry (Federal Energy Regulatory Commission [www.ferc.gov](http://www.ferc.gov) ; Public Service Commission of the State of Florida [www.psc.state.fl.us](http://www.psc.state.fl.us) ) (highlight “obligation to serve”).
- 01.05 Discuss environmental laws and regulations that impact the energy industry (local, state, and federal) and explain importance of proper documentation to ensure compliance.
- 01.06 Explain the different structures of energy companies, including investor-owned utilities, municipalities (and associated utility practices such as water/wastewater), electric cooperatives, independent power producers and can explain the different lines of energy business, including electric and gas.
- 01.07 Describe the process of electric metering and billing for energy consumption.
- 01.08 Discuss the importance and role of unions in the industry.

02.0 Apply compliance with procedures necessary to ensure a safe and healthy work environment-- the student will be able to:

- 02.01 Review the role of the U.S. Department of Labor/ Occupational Safety and Health Administration in work place safety.  
(<http://www.compliancereqs.com/29cfr/1910/subR/1910-269.html>)
  - 02.02 Identify both potential hazards and accident scenarios in the work environment.
  - 02.03 Follow established safety procedures (OSHA regulations and utility company procedures).
  - 02.04 Evaluate changes in the environment with respect to their impact on safety of self and others.
  - 02.05 Promote effective local, state, and national security operations for the protection of people, data, property and institutions.
  - 02.06 Comply with energy industry safety procedures and proper ways to perform work.
  - 02.07 Name potential threats created by deviation from safety procedures and improper use of tools and equipment.
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- 02.08 Use safety equipment as specified by user manuals and safety training.
- 02.09 Use Personal Protective Equipment (PPE) including safety glasses, hearing protection, gloves, work boots, and hard hats.
- 02.10 Keep personal safety equipment in good working order.
- 02.11 Use tools and equipment in compliance with user manuals and training.
- 02.12 Call attention to potential and actual hazardous conditions as they arise.
- 02.13 Alert coworkers and supervisory personnel to hazardous conditions and deviations from safety procedures in a timely manner.
- 02.14 Maintain appropriate certification and is knowledgeable in first aid or first response procedures.
- 02.15 Demonstrate understanding and knowledge of lock/tag out practices in the work place.
- 02.16 Notify person in charge and/or coworkers of unsafe work conditions.
- 02.17 Stop the job if there are unsafe working conditions.

03.0 Understand electric power generation-- the student will be able to:

- 03.01 Explain the conventional electric power generation systems and process (coal, gas, hydroelectric, and nuclear).
  - 03.02 Identify electric power generation equipment and systems.
  - 03.03 Identify various conventional electric power generation fuel sources and the cost/efficiency/environmental issues associated with each:
    - a. Explain how oil was created and list its advantages and disadvantages.
    - b. Explain how coal was created and what are its advantages and disadvantages.
    - c. Explain how natural gas was created and what are its advantages and disadvantages.
    - d. Explain how water is used in hydroelectric power generation and what are its advantages and disadvantages.
    - e. Explain how uranium is created and what are its advantages and disadvantages.
  - 03.04 Discuss emerging and alternative electric power generation technologies and fuel sources.
  - 03.05 Explain how solar energy is used to produce electricity in photovoltaic systems and what are its advantages and disadvantages.
  - 03.06 Explain how solar energy is used to produce electric energy using steam and what are its advantages and disadvantages.
  - 03.07 Explain how wind energy is used to produce electric energy and what are its advantages and disadvantages.
  - 03.08 Explain how geothermal energy is used to produce electric energy and what are its advantages and disadvantages.
  - 03.09 Explain how biomass energy is used to produce electric energy and what are its advantages and disadvantages.
  - 03.10 Explain how ocean wave energy is used to produce electric energy and what are its advantages and disadvantages.
  - 03.11 Discuss pros and cons of various energy producing technologies and fuels in the electrical infrastructure (including fossil, nuclear and emerging alternative energy systems).
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04.0 Understand electric power transmission-- the student will be able to:

- 04.01 Explain the electric power transmission process.
- 04.02 Discuss the application of different electric power transmission principles (including AC vs. DC).
- 04.03 Name electric power transmission equipment and systems.
- 04.04 Discuss the emerging technologies in electric power transmission (including Smart Grid).
- 04.05 Explain ownership/governance of the electric transmission system.

05.0 Understand electric power and natural gas distribution-- the student will be able to:

- 05.01 Explain the electric power distribution process.
- 05.02 Discuss the need for electric distribution systems and how they are designed to operate.
- 05.03 Name electric power distribution system equipment and-what the various components do.
- 05.04 Discuss the emerging technologies in electric power distribution, including distribution automation and SmartGrid systems.
- 05.05 Explain the fundamental concepts of natural gas.
- 05.06 Identify the components and workings of the gas transmission and distribution network, including metering and regulating stations.

06.0 Identify and describe careers and entry requirements-- the student will be able to:

- 06.01 Describe entry-level careers available in energy generation, transmission, distribution and the education/experience requirements for entry into those positions, along with career development and advancement opportunities from those positions.
  - 06.02 Identify entry-level careers available in business and corporate support functions of the energy industry; describes the education/experience requirements for entry into those positions, and career advancement opportunities from those positions.
  - 06.03 Describe general wage/salary, benefits, and other advantages of careers in the energy industry.
  - 06.04 Explain the educational pathways available to gain training necessary for entry into energy careers at secondary and post-secondary levels (Partner to create Energy Education Portal).
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07.0 Evaluate and analyze energy 'hot topics'-- the student will be able to:

- 07.01 Energy "Hot Topics"
  - 07.02 Describe energy efficiency/conservation
  - 07.03 Describe alternative energy (wind, solar, biomass, geothermal)
  - 07.04 Describe emerging technologies (wave, algae, IGCC, clean coal, etc.)
  - 07.05 Describe SmartGrid and Time of Use technologies
  - 07.06 Describe key energy regulatory topics (cap and trade, etc.) efficiency, cost, etc.).
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## Appendix B: Administering the Assessment

### Proctoring

In administering the assessment, there must be a proctor in the room. Students are not to take the assessment on their own at home or at school.

The proctor of the exam will have to provide the student with URL in order to enter into the assessment system. It is very important that you do not provide the URL before the session in which the student actually takes the assessment as the URL is date stamped.

As a proctor you will receive a report after the completion of the assessment with each student's score and data on overall pass rates by module by unit.

### Procedures for Ordering EIF Assessments

Institutions need to reach out to Julie Strzempko, [julie@cewd.org](mailto:julie@cewd.org) if possible two weeks prior to assessment date and request the number of assessments and the date.

Institutions will provide point of contact as to who should be receiving URL for assessments.

### Process for taking the Assessment

1. A URL is emailed to the instructor/proctor
2. Instructors are NOT to register for the exam
3. Instructor gives students URL
4. Students log into the URL and are emailed and shown a code
5. This code should be written down as it will be needed should there be any technical difficulties
6. To re-enter the exam should the students need to students should go to <http://www.fasttestweb.com/> enter their unique code.
7. Student will be notified at the completion of the exam if they passed and at what score
8. Instructors or designated POC will be emailed certificates

Should there be any technical difficulties contact Julie Strzempko @ 413-575-8605 or [julie@cewd.org](mailto:julie@cewd.org). If Julie is unavailable contact Assessment Systems at 763-476-4764 and press 1 for service and support.

### Process for paying for the Assessment

1. At the completion of the exam Julie will ask the institutions to generate a PO payable CEWD for the number of assessments times the \$30.00 assessment fee. IE: 15 students = \$450
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2. The PO must include:

Organization Name

Address (Street, City, State, Zip)

Phone

Fax

Website

Primary Contact

Email Address

Proctoring Date

Number of Students

PO should be sent to Julie and she will process. The PO should be made payable to:

**Center for Energy Workforce Development, 701 Pennsylvania Ave,  
NW, 3<sup>rd</sup> Floor, Washington, DC 20004.**

An invoice will be generated by CEWD for the amount due. Invoices may be paid by credit card.

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# Energy Industry Fundamentals

## Appendix D: Provider Application

This application is for educational institutions who wish to offer the Energy Industry Fundamentals course developed by the Center for Energy Workforce Development (CEWD) as an accredited certificate program. Please read the program handbook in advance of completing this application. This application should be submitted with required appendices to Julie Strzempko at [Julie@cewd.org](mailto:Julie@cewd.org).

### **SECTION 1A**

#### **Applicant Information**

**Organization Name**

**Tax ID Number**

#### **Type of Institution**

- High School     Community College     Trade/Technical College     Union  
 Training Provider (Please complete section below and then complete Section 1B)  
 Other (please specify) \_\_\_\_\_

\*Please attach a copy of the Articles of Incorporation or other proof verifying your status as a legitimate education operation and label as Appendix 1.

**Address**

**City, State, Zip**

**Contact Name**

**Contact Phone  
Number**

**Fax**

**Email**

### **SECTION 1B**

#### **Training Provider Information (high school and colleges N/A)**

**Target Audience  
(please be specific)**

**Purpose of Training**

**Funding Source**

**Do students  
directly incur any  
costs?**

### **SECTION 2**

All Course Providers must have a partnership in place with a local utility who is a member of CEWD in good standing in order to become an Approved Provider.

#### **Partner Utility**

**Partner Utility  
Name**

**Primary Contact at  
Utility**

**Phone Number**

**Fax**

**Email**

\*Training Providers: Please complete Utility Partner Verification, Addendum 1.

[www.getintoenergy.com](http://www.getintoenergy.com)

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### **SECTION 3**

#### **Course Instructors**

Course Instructors and Qualifications (include name, employer, degree and/or credentials, and year of teaching or training experience)

### **SECTION 4**

#### **Course Format**

How will you be offering the Energy Industry Fundamentals course (select all that apply):

#### **Audience**

- High School (general education)     High School (career/technical education)  
 Community College     Transitioning Workers     Pre-apprentice  
 Other (please specify) \_\_\_\_\_

#### **Course Format**

- Year-long course     Semester-long course     Bootcamp  
If you are a high school provider, what grade(s) is EIF being taught and over how many years? \_\_\_\_\_  
 Blended Learning     Other (please specify) \_\_\_\_\_

Please provide details on how the course will be taught, to include the following:

Is EIF being delivered by an instructor in a classroom? Is the online version of EIF being utilized for a blended learning approach? How many contact hours are in EIF? Include any other relevant details on instructional techniques being utilized.

Is EIF part of a CTE Pathway? \_\_\_\_\_

If so, what is the name of the Pathway? \_\_\_\_\_

Please provide a link to the pathway standards. \_\_\_\_\_

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## Credits/CEUs

Will the course be offered for college credits or CEUs?

College Credit       CEUs

Who will be awarding the credits or CEUs and how many?

You must follow the provision specified by the agency granting the credits or CEUs. How will you be doing this?

## **SECTION 5**

Describe the resources in place to support this coursework, including the facilities you will use and your personnel and financial resources in place to support the program.

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## **SECTION 6**

All Course Providers must have fair and equitable policies and procedures in place for the following items. Please describe how your organization addresses each item.

### **Records Control**

### **Complaints about course administration or grading**

### **Appeal of course grades**

**Where will the information about complaints and appeals be readily available for students?**

### **Privacy, confidentiality, and security of student information**

### **Disclosure of any commercial support**

### **Fees, cancellations, refunds**

### **Compliance with the Americans with Disabilities Act**

### **Non-discrimination policy**

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## **SECTION 7**

### **Course Marketing/Promotion**

Course Providers must include the following information in their marketing and/or communication materials for students.

- Standard course description included in the handbook as well as learning outcomes
- Special requirements for participation in the course (such as technology equipment or pre-requisites)
- Qualifications of instructors
- Fees and deadlines
- Cancellation and refund policies
- Academic or continuing education credit being offered
- Commercial support disclosure (if applicable)
- The requirements to earn the assessment-based certificate (completing the course and earning the minimum of 68% on the final assessment). You must also communicate the statement, "The bearer of the Energy Industry Fundamentals Certificate has a foundational knowledge and understanding of the utility industry."
- Any changes to the certificate program purpose, scope, intended learning outcomes, and requisites and the effective dates of changes (PLEASE NOTE: This is only applicable if new versions of Energy Industry Fundamentals are released by CEWD.)

Describe how you will communicate this information to students and include appropriate print materials in Appendix 2, as well as the website URL:

### **Course Provider Agreement**

Once this application is processed and approved, as an Approved Course Provider you must agree to the conditions below. Signature by an authorized representative is required on the last page.

- Provide adequate facilities and staffing to administer the program
- Teach the CEWD curriculum Modules 1-5 and administer quizzes to students for all modules (optional modules—Modules 6 & 7)
- Utilize sound instructional techniques to ensure students are engaging in a variety of learning activities included in the modules (i.e. labs, critical thinking, etc.)
- Follow required protocol for proctoring and accessing student scores for those who qualify to take the assessment. You must also communicate the statement, "The bearer of the Energy Industry Fundamentals Certificate has a foundational knowledge and understanding of the utility industry."
- Credential attainment for the first cohort must not fall below 65% of class. Second and subsequent cohorts must not fall below 75%.
- Agree to submit to optional site visits by CEWD, if determined necessary
- Agree to Approved Course Provider confidentiality agreement and conflict of interest terms\*

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**Addendum 1**

**\* Only to be completed by Training Providers, not high school and college providers.**

**Utility Partner Verification for Training Providers**

I attest that ( \_\_\_\_\_ ) has met the necessary qualifications and standards  
*name of training provider*  
for delivering EIF as defined by CEWD. We acknowledge that ( \_\_\_\_\_ ) in  
*name of training provider*  
training students in EIF is providing us ( \_\_\_\_\_ ) with a valuable resource  
*Utility Partner*  
In expanding our talent pool for potential workforce candidates.

\_\_\_\_\_  
Utility Partner

\_\_\_\_\_  
Utility Partner Representative Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

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I attest that this information is true and agree to abide by the requirements set forth in the EIF Course Provider Handbook and in this application. I hereby authorize CEWD to validate any or all information included in this application and to conduct such other due diligence as CEWD deems appropriate or necessary in connection with this application.

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Approved Provider Representative Signature

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Printed Name

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Title

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Date

**\*Confidentiality Agreement and Conflict of Interest Terms:**

The Approved Course Provider (ACP) shall safeguard the privacy of individuals, where applicable, and shall hold in confidence and in a secure manner the information obtained in the course of certificate program activities at all levels of the organization, including those of subcontractors acting on its behalf. Information about a particular individual shall not be disclosed to a third party by ACP personnel without the written consent of the individual. Where the law requires information to be disclosed to a third party, the individual shall be notified of the information provided.

The ACP agrees that it will avoid any conflicts of interest or appearance of any conflicts of interest in performing its duties as an ACP. In addition, the ACP agrees to let CEWD know in writing if a conflict of interest exists or potential conflict arises between CEWD and the interests of another organization.

## Appendix E: Instructor Profiles

### Post Secondary/Adult Vocational/Continuing Education/Workforce

#### *Desired Background/Previous Professional Experience*

- Two (2) years' teaching experience (i.e. as a trainer for a utility company or as a college instructor in Energy Industry-related courses)
- Technical knowledge and experience in the Energy Industry

#### *Desired Characteristics/Abilities*

- Ability to cultivate relationships with appropriate local utility industry representatives.
- Ability to mentor students, and to assist them in connecting with people from business and industry.
- Ability to navigate and utilize the internet as a resource.
- Ability to maintain course equipment. Since the lab activities are such a vital part of the contextual learning experience, it is essential that the lab equipment be maintained and remain easily accessible.
- Ability to develop soft skills in students. Instructors will develop or identify, and then implement, activities and rubrics that develop, assess, and continue to encourage the development of soft skills in students.
- Ability to be comfortable being active equal learners alongside students.
- Willingness to follow prescribed curriculum and associated pedagogy.
- Verbal, listening, writing, problem-solving and critical thinking skills.

### Secondary Teacher

#### *Desired Background/Previous Professional Experience*

- Appropriate teaching certification (Science certification—Physics or Earth Science preferred; Career and Technical Education certification with preferred experience teaching in fields requiring knowledge of the properties of electrical and mechanical systems, e.g. Electrical Technologies, Engineering Technologies, Construction Technologies, Energy and Natural Resources Technologies, etc.)

#### *Desired Characteristics/Abilities*

- Ability to cultivate relationships with appropriate local utility industry representatives.
  - Ability to mentor students, and to assist them in connecting with people from business and industry.
  - Ability to navigate and utilize the internet as a resource.
  - Ability to maintain course equipment. Since the lab activities are such a vital part of the contextual learning experience, it is essential that the lab equipment be maintained and remain easily accessible.
  - Ability to develop soft skills in students. Teachers will develop or identify, and then implement, activities and rubrics that develop, assess, and continue to encourage the development of soft skills in students.
  - Ability to be comfortable being active equal learners alongside students.
  - Willingness to follow prescribed curriculum and associated pedagogy.
  - Verbal, listening, writing, problem-solving and critical thinking skills.
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## Appendix F: Sample Policies

These policies are a sample only, and need not be used by applicants.

### Records Control

#### *Scope of Records Control System*

A certificate records control system shall be maintained to ensure that certificate program records are identified, managed, and disposed of in a manner designed to ensure integrity of the program and confidentiality of the information.

#### *Certificate Record Control Responsibility*

The <personnel title> shall be responsible for ensuring the certificate record control system is implemented.

#### *Certificate Record Control Schedule*

Records shall be kept according to the following schedule.

RECORD TYPE	MINIMUM REQUIREMENT
Student information: name, identification number, course grades, pass/fail status	10 years
Reports (Evaluations, Test Performance)	10 years
Appeal and Complaints Documentation	7 years
Intellectual property records, copyright and trademark registrations, copies of protected works	Permanently

#### *No Retention Required*

Documents and other materials (including originals and duplicates) that are not otherwise required to be retained, are not necessary to the functioning or continuity of the ACP and which have no legal significance may be destroyed when no longer needed. Examples include draft documents, duplicate copies of records that are no longer needed, reminder messages, miscellaneous correspondence not requiring follow-up or action. No specific retention requirements are assigned to these types of documents.

#### *Security of Records*

The ACP shall restrict access to the student records maintained in the ACP's database system to only those personnel requiring access to accomplish certificate-related duties. Access to student records shall be by authorization only.

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### *Disaster Recovery Plan*

The ACP shall have a disaster recovery plan that guarantees electronic records access a minimum of twenty-four (24) hours after a disaster eliminates the primary records depository. The disaster recovery plan shall assure that the backup records are external from the primary records depository.

## **Complaints (about course administration, grading, etc.)**

### *Resolution of Concerns*

Individuals with concerns regarding the coursework, personnel, or other elements of the certificate program are encouraged to discuss these with the individuals involved to try to resolve the matter informally. In some cases, however, informal resolution is not possible, and individuals may wish to file a formal complaint.

### *Submission of Program Complaints*

A complaint shall be submitted in writing to the ACP Administrator within ninety (90) days of the incident's occurrence. In the case of complaints related to a course or course grade, those must be submitted in writing within two (2) weeks after the grade has been published. The submission may be mailed, e-mailed, or faxed. The submission shall include sufficient objective evidence to substantiate the claims and allow for a decision to be made and the appropriate action to be taken. Dissatisfaction based on hearsay shall not be considered as a complaint. Only written complaints shall be considered. Anonymous complaints shall not be considered.

### *Staff Level Review*

The ACP Administrator shall serve as the first level of complaint consideration to determine its validity. He or she shall investigate the circumstances of any valid complaint and 1) determine and implement corrective action, 2) refer the complaint to a different suitable personnel member to determine and implement correction action, or 3) escalate it to an ad hoc Complaints Panel for review. If addressed by personnel, the ACP Administrator shall communicate the resolution to the complainant within a period of no longer than thirty (30) days.

### *Ad hoc Complaints Panel Review*

If a complaint is found to warrant escalation, the ACP Administrator shall convene a three-person Appeals Panel to consider the complaint, ensuring that no members of the Panel have actual or apparent conflicts of interest with the case at hand. The complaint shall be considered within sixty (60) days. The ACP Administrator shall communicate the resolution to the complainant within a period of no longer than thirty (30) days.

### *Appeal of Complaint Determinations*

The determination of personnel or the Appeals Panel is appealable, and the Appeals policy shall apply.

### *Program Complaints Tracking*

All complaints and dispositions shall be recorded in the Complaints Register, which shall be maintained by the ACP Administrator.

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## **Appeals (of course grades, complaint handling, etc.)**

### *Definition*

An appeal is a formal request for reconsideration of an adverse decision made by a CEWD Certificate Advisory Council or its representatives related to an individual's achievement of a certificate.

### *Appeal Submission*

An appeal must be made in writing to the CEWD Educational Consultant within thirty (30) days of receiving the determination being appealed. The written appeal must include the stated appeal, the reason for the appeal (including relevant supporting materials), and appellant's contact information.

### *Appeal Review and Determination*

When an appeal is received, the CEWD Educational Consultant shall convene a three-person Appeals Panel to consider the appeal, ensuring that no members of the Panel have actual or apparent conflicts of interest with the case at hand. The function of the Appeals Panel in a given case is to review the decision being appealed based on the record that was presented at the time of the determination. The appeal shall be considered within sixty (60) days. The CEWD Educational Consultant shall notify the appellant of appeal decisions within fourteen (14) days from the Appeals Panel determination. Appeals Panel decisions shall be final.

### *Appeal Determination Impacting Others*

Should the Appeals Panel grant an appeal on an issue that impacts the assessment scores of other certificate program participants or certificate holders, a review or rescoring of all those potentially impacted shall automatically be conducted. The CEWD Educational Consultant shall notify the individuals of the review or rescoring and final decision within sixty (60) days of the decision.

### *Program Appeals Tracking*

All appeals and dispositions shall be recorded in the Appeals Register, which shall be maintained by the CEWD Educational Consultant. The Appeals Register shall be reviewed periodically, at a minimum as part of the internal audit of the appeals policies and procedures, to identify the need for corrective or preventive action.

## **Privacy, Confidentiality and Security of Student Information**

The ACP shall safeguard the privacy of individuals, where applicable, and shall hold in confidence and in a secure manner the information obtained in the course of certificate program activities at all levels of the organization, including those of subcontractors acting on its behalf. Information about a particular individual shall not be disclosed to a third party by the ACP personnel without the written consent of the individual. Where the law requires information to be disclosed to a third party, the individual shall be notified of the information provided.

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**Disclosure of Commercial Support**

The ACP shall not accept commercial support of its certificate program activities if such acceptance would, or would appear to: (1) create an atmosphere limiting the free exchange of ideas and information; (2) introduce bias or otherwise threaten objectivity; or (3) create a conflict of interest.

When funding is accepted from external sources, that funding shall be disclosed on program promotional materials and the website.

**Fees, Cancellations, Refunds**

*These policies are too unique to each ACP to list a sample.*

**Compliance with the American with Disabilities Act**

Reasonable accommodations for assessment shall be provided at no cost to candidates with special medical needs covered under the Americans with Disabilities Act who submit a written explanation of their needs, along with appropriate medical documentation. The ACP may submit information regarding the stated disability and requested accommodation to its own expert advisers and reserves the right to provide only those reasonable accommodations as required by law.

**Non-discrimination**

In offering the Energy Industry Fundamentals certificate program coursework, the ACP shall not discriminate or deny opportunity to anyone on the grounds of sex, age, religion, race, marital status, parental status, status as a veteran, sexual orientation, or nationality.

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