ENSURING THE
EXPERTISE TO GROW
SOUTH AFRICA

Process for training engineering candidates towards professional registration under a Commitment and Undertaking

R-11-PRO-PC

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DEFINITIONS OF TERMS

Commitment and Undertaking (C&U): An agreement entered into between an employer and ECSA under which the employer commits to the training of candidates to the standard required for registration in an identified Professional Category. A C&U may be entered into for one or more of the Professional Categories.

Competency Indicator: The typifying guide to evidence indicating competence that is not normative.

Continuing Professional Development (CPD): The systematic maintenance, improvement and broadening of knowledge and skills, and the development of personal qualities necessary for the execution of professional and engineering duties throughout an engineering practitioner's career.

Engineering Problem: A problematic situation that is amenable to analysis and solution using engineering sciences and methods.

Engineering Science: A body of knowledge based on the natural sciences and using mathematical formulation where necessary that extends knowledge and develops models and methods to support its application, solve problems and provide the knowledge base for engineering specialisations.

Employer: A professionally registered or competent person or company that is involved in training and programme development for candidates.

Integrated Performance: An overall satisfactory outcome of an activity that requires several outcomes to be satisfactorily attained. For example, a design requires analysis, synthesis, analysis of impacts, checking of regulatory conformance and judgement in decisions.

Initial Professional Development: The systematic participation in the activities typical of Continuing Professional Development but completed prior to professional registration.

Level Descriptor: A measure of performance demands at which outcomes must be demonstrated in accordance with Degree of Responsibilities (DoR).

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Mentor: A professionally registered person who guides the competence development of a candidate in a concomitant category.

Outcome: A statement of the performance criteria that a person must demonstrate to be judged competent at the professional level.

Supervisor: A professionally registered or competent person who oversees, controls and takes responsibility for engineering work performed by a candidate.

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ABBREVIATIONS AND ACRONYMS

C&U	Commitment and Undertaking
CEO	Chief Executive Officer
CPD	Continuous Professional Development
DoR	Degree of Responsibility
ECSA	Engineering Council of South Africa
EPA	Engineering Profession Act
IPD	Initial Professional Development
TER	Training and Experience Report

DOCUMENT CUSTODIAN

The custodian of this document is the Research Policy and Standards Division. The Regulatory Function Division is responsible for its implementation.

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BACKGROUND

The illustration below defines the documents that comprise the Engineering Council of South Africa (ECSA) system for registration. The illustration also locates the current document.

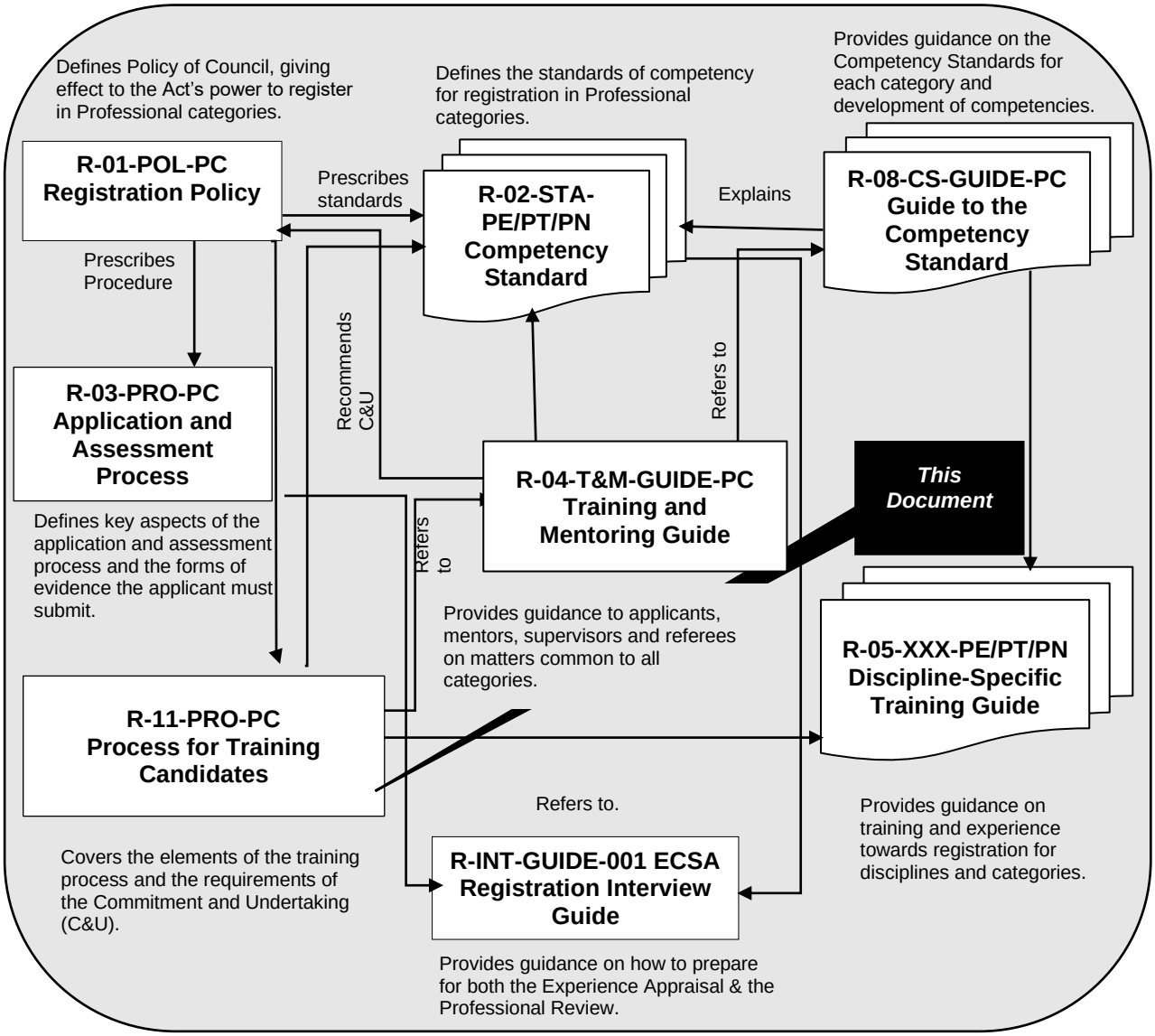

Figure 1: Documents defining the ECSA registration system

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1. PURPOSE OF THIS DOCUMENT

This document focuses on the Commitment and Undertaking (C&U) approach where employers and mentors sign a C&U with ECSA as an expression of their intent to efficiently train candidates towards professional registration. The benefit of candidate training under a C&U is that candidates may become registered in the shortest possible time after graduation (i.e., 3–4 years), thus increasing the organisation's capacity and attractiveness in terms of enticing high calibre graduates.

This document encompasses the training process for candidates who wish registration towards professional categories under C&U, namely:

- Candidate Engineer
- Candidate Engineering Technologist
- Candidate Certificated Engineer
- Candidate Engineering Technician.

The elements of the training process and the requirements of the C&U are covered in this document.

To ensure that candidates achieve the level of competence required for professional registration in 3–4 years, employers should provide them with appropriate training and experience and should ensure regular interaction between the candidates and their mentors to plan and monitor progress. The level of commitment on the parts of the candidates, mentors and employers towards achieving the required competencies generally determines the rate of progress towards professional registration. To this end, ECSA has a number of approaches to facilitate structured training and experience such as C&U and Certified Training Academies.

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2. ROLES AND STAKEHOLDERS

As outlined in document **R-04-T&M-GUIDE-PC**, the goal of the training programme is to allow candidates to develop their competency to the point of being able to demonstrate the outcomes at the required level on a sustained basis and to take responsibility for the work performed. The three key players in the training of candidates are supervisors, mentors and referees. These players are described below in terms of roles because an individual may perform more than one player's function.

2.1 Candidate

A candidate is a person who is registered in terms of section 19(2)(b) of the Engineering Profession Act, 46 of 2000 (EPA). It is the candidate's responsibility to ensure that training received will culminate in the competency as defined in the ECSA standards. ECSA places emphasis on candidates training under a professional registered mentor and following a training programme under a structured *Training and Mentoring Programme* as a mentee that has been professionally registered as recommended by the ECSA in document **R-04-T&M-GUIDE-PC**.

Candidates should appreciate that the onus is on them to ensure that the training received will culminate in the competency defined in the standards. Council prefers candidates to follow a training programme under a C&U agreement that has been registered by Council and as is required, that has at least one professionally registered mentor in terms of the C&U.

Refer to *Training and Mentoring Guide,* document **R-04-T&M-GUIDE-PC**, for further details on *Candidate (as a Mentee) Roles and Responsibilities*.[1]

[1] ***Note 1:*** *If candidates experience difficulties with their training, they should attempt to resolve them through the normal channels for guidance via their mentors; responsible and relevant engineering institutions / institutes / bodies and organisations regulated by the EPA have indicated their willingness to assist candidates in this regard.*

Transfers or Secondments

Depending on where the candidate is employed, there may be situations where opportunities within the department or organisation are not sufficiently diverse to develop all the competencies required. In such cases, Candidates should be transferred to other departments or units that can support their training and experience requirements. Where opportunities within the organisation are inadequate, secondment to another employer should be considered.

2.2 Supervisor

The supervisor directs and controls the candidate's engineering work and takes responsibility for the work in terms of section 18(4) of the EPA. Supervision may not be direct, but it must be performed on an adequately informed base. Intermediaries between the candidate and the supervisor should preferably be registered but if not registered, they must be of adequate engineering competence. The supervisor, together with the mentor and the candidate, is expected to plan the training task by task to develop the candidate's competence and to review the achievements of each task.

Supervisor as a mentor

A supervisor who is professionally registered may also fulfil the role of the mentor.

2.3 Mentor

The mentor must be professionally registered in the appropriate category or in another relevant category if specifically agreed to by Council. The mentor's role is to guide, coach and facilitate the candidate's professional development. Mentors must be willing to share with mentees their valuable knowledge about their own career path in a particular engineering professional category/level descriptor.

Should the services of an internal mentor unavailable to an employer, the employer may use the services of an External ECSA Professional Registered Mentor through one of the relevant engineering institutions/institutes/bodies. Mentors thus appointed should be sensitive to any limitations that the employer may wish to set in any given situation.

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Refer to the *Training and Mentoring Guide,* document **R-04-T&M-GUIDE-PC**, for further details on *Mentors' Roles and Responsibilities*; *External Mentor; Mentor Database benefits for the Employers; and requirements for becoming an ECSA Professional Registered Mentor*.

2.4 Referee

A Referee must be professionally registered and have first-hand experience of the candidate's engineering activities, particularly the activities that are indicative of the candidate's professional competency. The referee can be a mentor, colleague at a higher senior or the same level involved in mentee's work, immediate or indirect supervisor, employer or client who has personal knowledge of the mentee's professional performance and engineering experience. The referee must be in a position to assess the candidate's competence as a professional and to attest to the candidate's ethical analysing confidently.

Refer to the *Training and Mentoring Guide,* document **R-04-T&M-GUIDE-PC** for further details on *Referee Roles and Responsibilities* with a table indicating the eligibility and preferred capacity in various professional categories.

3. TRAINING UNDER A CANDIDACY PROGRAMME

As outlined in document **R-04-T&M-GUIDE-PC** (under *Development Process and Mentoring Stages of The Engineering Professionals*), there are three stages in the development of an engineering professional. Stage 2 refers to *Training and Mentoring for the Graduate Route,* which consists of a process of acquiring training and experience via a Candidacy Programme. The Candidacy Programme assists the candidate to meet the professional competency requirements for registration as part of training and experience that builds on the higher education qualification to develop the competencies required for registration.

Document **R-04-T&M-GUIDE-PC** draws the distinction between training and experience as follows:

- Training is the process of acquiring specific practical knowledge, skills, attitudes and values under the direction of competent persons. Training may be supported by formal courses and other learning activities. The majority of the training time is spent conducting engineering work.

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- Experience is a process of gaining competence by active involvement in the work environment.

3.1 A Candidacy Programme

As outlined in document **R-01-POL-PC**, a Candidacy Programme is a framework for employers to plan and execute training of candidates towards registration in a Professional Category. The objective of the Candidacy Programme is for the candidate to become registered with ECSA in the appropriate category. A Candidacy Programme, which is a means of implementing a C&U, has the following components:

- The candidate is enrolled in a Candidacy Programme by the employer who will provide the training and experience.
- The *Competency Standards* generated by ECSA are used as workplace standards. The *Competency Standards* define the competency outcomes of the training programme. The employer must define the process to be used to develop competence to the required level. The employer must specifically refer to the workplace standards in its workplace skills plan. Context-specific training guides generated by the sector may be used. These must not conflict with the generic competencies but rather provide amplification in the particular work context.
- If not already registered, the candidate should register in the appropriate Candidate Category with ECSA as early as possible within the training period.
- The employer will provide an internal supervisor and a mentor who is preferably internal but may be external to the company. While the supervisor and mentor may change from time to time, employers must ensure continuity of supervision and mentoring.
- The employer provides structured training and work experience, which is managed using a standard format training record. The candidate's progress is continuously assessed by supervisors and mentors, using the *Training and Mentoring Programme Process Tool or Technique* for recording and tracking as stipulated in *Training and Mentoring Guide,* document **R-04-T&M-GUIDE-PC**.
- When candidates are considered ready for registration, they apply to ECSA for registration. Evidence of competence as required by ECSA must be provided. ECSA performed the summative assessment of competence.

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- Success in attaining registration is considered evidence of the quality of the training programme. The workplace *Training and Mentoring Programme* is not subject to formal quality assurance.

3.2 Overview of Competency Standards

The *Competency Standards for Engineering Professionals* as outlined in document **R-02-STA-PE/PT/PN** or **R-02-STA-PCE** they are defined as 11 outcomes clustered into five groups. As summarised in document **R-04-T&M-GUIDE-PC**, candidates must be competent in demonstrating the following:

Group A: Knowledge-based engineering problem-solving

- **Outcome 1:** Define, investigate and analyse [level] engineering problems.
- **Outcome 2:** Design or develop solutions to [level] engineering problems.
- **Outcome 3 (Pr Eng):** Comprehend and apply advanced and local knowledge of the widely applied principles underpinning good practice that are specific to the jurisdiction in which the engineer practises.
- **Outcome 3 (Pr Techno Eng) & (Pr Cert Eng):** Comprehend and apply the knowledge embodied in widely accepted and applied engineering procedures, processes, systems and methodologies that is specific to the jurisdiction in which the Engineering Technologist practises.
- **Outcome 3 (Pr Techni Eng):** Comprehend and apply knowledge that is embodied in established engineering practices that is specific to the jurisdiction in which the Engineering Technician practises.

Group B: Manage engineering activities

- **Outcome 4:** Manage part or all of one or more [level] engineering activities.
- **Outcome 5:** Communicate clearly using multiple media and collaborate inclusively with a broad range of stakeholders in the course of engineering activities.

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Group C: Impacts of engineering activity

- **Outcome 6:** Recognise and address the reasonably foreseeable economic, social, cultural and environmental effects of [level] engineering activities.
- **Outcome 7:** Meet all legal, regulatory and cultural requirements and protect the health and safety of persons during all engineering activities.

Group D: Exercise judgement, take responsibility and act ethically

- **Outcome 8:** Conduct engineering activities ethically.
- **Outcome 9:** Exercise sound judgement by evaluating the outcomes, impacts and alternatives in the course of [level] engineering activities.
- **Outcome 10:** Be responsible for making decisions on part or all of [level] engineering activities.

Group E: Continuing professional development

- **Outcome 11:** Undertake sufficient professional development activities to maintain, extend competence and enhance the ability to adapt to emerging technologies and the ever-changing nature of work.

Outcomes 1 and 2 require a level descriptor for the level of problem-solving. This descriptor accounts for the knowledge required for the analysis and design or development of solutions, the degree to which the problem is defined, the factors that may make the solution difficult and the uncertainty and consequences of the problem and the solution.

Outcomes 4, 6, 7, 9 and 10 require a level descriptor for the demands of engineering activities for each category.

These level descriptors are defined for the four Professional Categories in the *Competency Standards* in documents **R-02-STA-PE/PT/PN** or **R-02-STA-PCE**. The candidate or prospective applicant for registration should be familiar with the requirements of the applicable standards for the category. The competency indicators and range statements for all 11 outcomes for the four professional categories per level descriptor are defined in the *Competency Standards* in documents **R-02-STA-PE/PT/PN** or **R-02-STA-PCE**.

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3.3 Evidence required for competent performance

As outlined in document **R-04-T&M-GUIDE-PC**, while competence is determined by 11 outcomes that must be demonstrated at a particular level, the applicant for registration must demonstrate integrated performance against outcomes. This reflects the reality that an engineering task or function is unlikely to require only one outcome. For example, problem analysis seldom stands alone; it requires the use of knowledge and the analysis of impacts, and it must lead seamlessly into the solution phase.

Different engineering functions and assignments have different mixes of demand. As part of the application for registration, the applicant is expected to provide evidence of working at the required level of problem-solving in engineering activities at the specified level of demand.

As outlined in document **R-04-T&M-GUIDE-PC**, applicants for registration must document evidence for the registration applications and must undergo documentary interactive assessment by Engineering Professionals who will judge the demonstrated competency against the defined standards.

Details of evidence required to demonstrate outcomes achieved are specified in document **R-03-PRO-PC** (Processing of Applications for Registration of Candidates and Professionals).

Competency Standards for registration in each Professional Category are available in the **R-02-STA-PE/PT/PN** and **R-02-STA-PCE** documents.

The elements of a *Candidacy Training and Mentoring Programme* as outlined above are expanded upon in Sections 3 to 4 of this document. Further details on *Training and Mentoring*, document **R-04-T&M-GUIDE-PC**, can be found under the section for *Documenting and Review of Training and Experience*.

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4. DEVELOPMENT PROCESS OF TRAINING AND EXPERIENCE

It is imperative that candidates follow the *Training and Mentoring,* document **R-04-T&M-GUIDE-PC**, for the mentoring programme process stages as detailed under the *Development Process and Mentoring Stages* section.

Candidates are required to gain structured training and experience at their place of work according to ECSA's prescribed *Competency Standards* over a period of usually 3–4 years with the support of a mentor (registered professional). The *Degrees of Responsibilities (DoR) aligned with Progression Levels* over the period from DoR Level A to E with the *Mentee Progression Principles* to be followed are outlined in detail. The *Competency Standards* are outlined in document **R-02-STA-PE/PT/PN** and **R-02-STA-PCE.**

The focus of *Candidacy Training and Mentoring* programmes is not on attending courses but on gaining work experience through being part of a team delivering engineering solutions. As outlined in document **R-04-T&M-GUIDE-PC**, candidates should engage in a sequence of activities that may be the completion of a particular aspect of training or engineering work/ activities, carrying out defined tasks under close supervision shown as DoR progression levels in ***Figure 1***.

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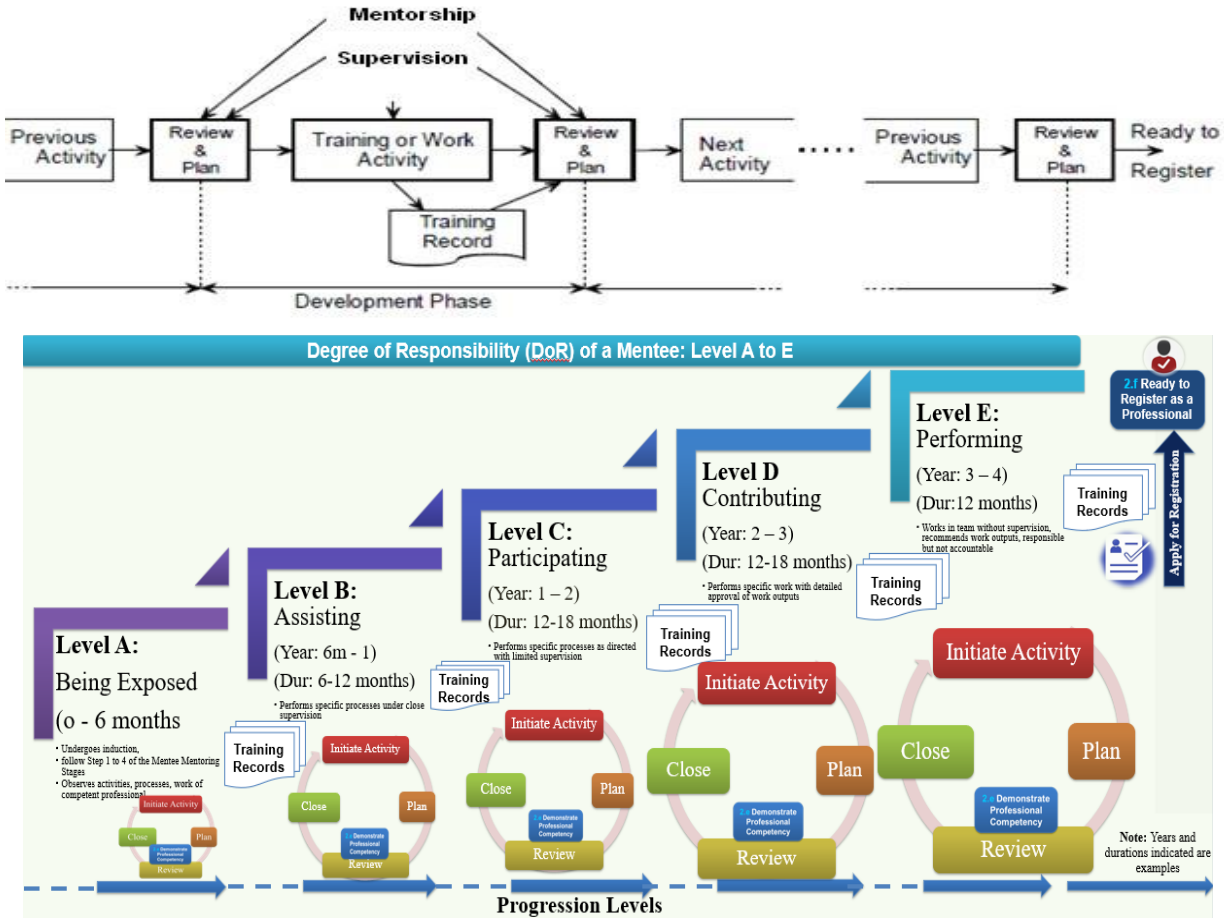

Figure 1: Degree of responsibilities for a mentee aligned with progression levels

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Each of the DoR levels consists of the following sequenced activities. Three measures are recommended:

1. The candidate's (referred to as applicant's/mentee's) record-keeping must be consistent across the various periods and modes of training.
2. If possible, the candidate (referred to as applicant/mentee) should retain the same mentor if the employer or mode of training changes.
3. In the final analysis, the candidate (referred to as applicant/mentee) must take ownership of the training and negotiate with employers to ensure the necessary competencies are attained.

As outlined in detail in the diagram in document **R-04-T&M-GUIDE-PC**, the section for *Mentee Progression Principle* relates to specific engineering work/activities/tasks/projects within the training period, as follows:

(a) Initiation of an activity

(b) Planning

(c) Review (i.e., which is part of the Stage 2 for *Demonstrate Professional Competency*)

(d) Close (i.e., where the training records are kept).

The training process is governed by standards, policies and procedures. For each DoR stage, the candidate, working with the supervisor and mentor, sets and documents the competency development objectives of the phase. At the completion of the phase, the achievements realised against the objectives set are reviewed by all and rated, and objectives are set for the next phase.

4.1 Planning guidelines for candidates

Refer to document **R-04-T&M-GUIDE-PC** under section for *Planning Guidelines for Mentors and Mentees* where it sets out that candidates will benefit during the progression through DoR Levels. When selecting engineering work/activities/tasks/projects and agreeing upon the activities for candidates to work on during each DoR stage, the following three principles outlined in document **R-04-T&M-GUIDE-PC** must be considered by the mentor and candidate:

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1. The planning, execution and monitoring must focus on the competencies to be developed.

2. A variety of work activities is necessary for the proper development of a candidate. The objective of having a variety of work is to broaden the candidate's experience and to ensure that all aspects of competency are developed and ultimately assessed. Variety may be obtained in different ways, both singly and in combination:

    - The engineering activities of an individual are located at various stages in the lifecycle of an engineering activity/work/project, that is, conception, planning, design, construction/implementation, operation, plant handover and decommissioning, as stipulated as example in figure for *Visualising for the Interconnectedness of the Engineering Outcomes* in document **R-04-T&M-GUIDE-PC**.
    - Associated with this lifecycle are specific functions that include commissioning, testing, improving and troubleshooting as stipulated, for example, in the figure for the *Generic Lifecycle of Engineering Work / Project* in document **R-04-T&M-GUIDE-PC**. Candidates should gain experience in several stages in the overall lifecycle of each project.

    Variety may also involve different aspects of a discipline (or cross-disciplinary fields). The *Discipline-specific Training Guidelines*, **R-05-XXX-PE/PT/PN** or **R-05-XXX-PCE** (and Requirements) give indications of an acceptable variety of experience in different disciplines and may enlarge on training aspects appropriate to the discipline. Guidelines specific to individual disciplines (where these exist) are available in the following documents:

    - **R-05-XXX-PE/PT/PN:** Discipline-Specific Training Guide for Candidate Engineers, Engineering Technologists, Engineering Technicians;
    - **R-05-XXX-PCE:** Discipline-Specific Training Guideline and Requirements for Candidate Certificated Engineers.

3. Increasing responsibility and accountability within the organisation must be imposed on and accepted by candidates until they are capable of accepting professional responsibility for making and executing engineering decisions at the full professional level (i.e., DoR Level E: Performing). The DoR descriptors defined in document **R-04-T&M-GUIDE-PC** in

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Table 3 should be used to quantify the DoR and accountability and recorded via the *Training and Mentoring Programme Process Tool/Technique*.

The training and mentoring process may involve structured activities that include induction and training courses on specific skills or technologies. Candidates should also participate in self-initiated professional development activities, termed Initial Professional Development (IPD) activities.

Provided the 3-year minimum period of training has elapsed, when the candidate has achieved the full professional level, the mentor and candidate may determine that sufficient evidence of competence has been accumulated to apply for registration. The candidate may then prepare and submit an application for registration setting out evidence of competency.

4.2 Progression levels of responsibility of a candidate aligned to DoR

As outlined in document **R-04-T&M-GUIDE-PC**, the main *Training and Mentoring Programme* process is through working with competent engineering personnel (refer to the section for *Progression Levels of Mentee aligned to DoR* in document **R-04-T&M-GUIDE-PC**). Considering ***Table 1*** below, candidates initially assist with engineering work/projects/activities, undertaking defined tasks under close supervision. Candidates progress to contributing to the work both individually and as a team member. By the end of the training period, candidates must perform individually and as a team member at the level of problem-solving and engineering activity required for registration and must exhibit the exit DoR of Level E. This level of work provides evidence of competency against the standards. Over time, the emphasis on training (i.e., learning through the inputs of others) is surpassed by learning through performing engineering work and reflecting on observations and achievements. This is known as experience.

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Table 1: The nature of work and summary of degrees of responsibility

Degree of Responsibility	Nature of work: the mentee	Responsibility of mentee	Extent of mentor support	Extent of supervisor support
Level A: Being Exposed	Undergoes induction, observes engineering activities, processes, and work of competent professionals.	No responsibility, except to pay attention.	Mentor showing genuine interest in candidate's work. Mentor explains challenges and forms of solution.	Accept candidate's plan for training and mentoring programme via the *Training and Mentoring Programme Process tool / Technique*.
Level B: Assisting	Performs specific engineering activities and processes under close supervision.	Limited responsibility for work output.	Mentor coaches, offers feedback.	Closely supervise the candidate's engineering activities/work/ projects.
Level C: Participating	Performs specific engineering activities and processes as directed with limited supervision.	Candidate articulates own reasoning and compares it with that of supervisor.	Exposes candidate to increasing demands in the range of engineering competencies through shared knowledge.	Supervisor progressively reduces support but monitors outputs.
Level D: Contributing	Performs specific work with detailed approval of work outputs.	Full responsibility for supervised work.	Mentor supports mentee in building strong problem-solving skills via experience sharing.	Full responsibility to supervise the immediate quality of work done by candidate. (e.g., monitor and approve).
Level E: Performing	Works in team without supervision,	Level of responsibility to supervisor is	Provide construction review	Candidate takes on problem-solving

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Degree of Responsibility	Nature of work: the mentee	Responsibility of mentee	Extent of mentor support	Extent of supervisor support
	recommends work outputs, responsible but not accountable.	appropriate to a Registered Person; supervisor is accountable for mentee's decisions.	feedback on industry projects against competency outcome objectives.	without support, or at most, with limited guidance

As outlined in document **R-04-T&M-GUIDE-PC**, candidates must demonstrate that they are able to take responsibility for the engineering work performed, and this requires careful management by their supervisors through a training and mentoring programme. Within the training process, the conflicting requirements of candidates not being allowed to take responsibility but being required to show that they can perform engineering work and take responsibility at a professional level must be managed.

It is helpful to identify two aspects of responsibility:

- Taking due care to ensure that the objectives of the engineering work are achieved and the impacts of risks are addressed.
- Being accountable for the work, particularly ensuring that due care was taken to deal with the risks.

Supervisors and mentors must implement strategies to ensure that the candidate can demonstrate the ability to exercise due care without having to make decisions that require accountability. Prior to registration of a candidate as a professional, the supervisor is accountable. Taking due care requires candidates to exercise the defined competencies of problem-solving, management, impact identification and mitigation, ethical behaviour, acting responsibly and applying judgement. Working within the limits of these competencies is a clear requirement. In such a mode of working, candidates are required by the supervisors to express judgement and propose decisions and recommendations, which may be at the level at which Registered Persons normally perform. While not carrying any legal accountability, the candidate is accountable internally within the employer organisation. Supervisors must check

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the judgements, decisions and recommendations because they bear ultimate responsibility for the work.

Furthermore, document **R-04-T&M-GUIDE-PC** illustrates the detailed *Technique for Successful Mentor–Mentee Relationship* that the candidate must apply through the Progression DoR Levels A to E.

4.3 Documenting and review of training and experience

The phase-by-phase planning and reviewing of the candidate's training must be supported by documentation for the immediate purpose of managing training and the mentoring programme for the subsequent purpose of compiling evidence for the candidate's application for registration.

Training and experience are generally arranged in discrete activities, tasks or DoR levels as shown in figure for the *Degrees of Responsibilities for a Mentee Aligned with Progression Levels* in document, **R-04-T&M-GUIDE-PC**. Each DoR level of an engineering activity is designed with an appropriate DoR to develop specific aspects of competency (outcomes) at an agreed level of problem-solving as detailed in documents **R-02-STA-PE/PT/PN** or **R-02-STA-PCE**. Such a unit typically ranges from several weeks to several months in duration. For each task or DoR level, the candidate together with the supervisor and mentor should use a suitable format for recording the planned outcomes, the levels to be achieved and the results of the previous DoR Level. The format of recording should be via the *Training and Mentoring Programme Tool / Technique* as explained in document, **R-04-T&M-GUIDE-PC**. Document **R-03-PRO-PC** defines key aspects of the application and assessment process and the forms of evidence that must be submitted by the applicant. Suitable templates are the forms concerning the *Training and Experience Reports* (TERs) that are included in the application forms for professional engineering applicants. These forms allow particular aspects of competency to be identified as being amenable to development in the relevant task or DoR level. In addition, the level at which competency is to be demonstrated must be identified in addition to the nature of the candidate's responsibility.

When the task or DoR Level is complete, the candidate, supervisor and mentor must review and rate the level of competence learnt and displayed. Each engineering project/task/work/

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project within the period must be rated by the mentor from inadequate to adequate, as referenced in document **R-04-T&M-GUIDE-PC**. The rating method and rating must comprise four elements: 1. Appreciation, 2. Knowledge, 3. Experience, 4. Capability.

Level descriptors for problem-solving and the demands of engineering work should be consulted to determine progress to the exit level. Any achievement (or shortfall) may influence the planning of subsequent tasks or phases. The assessment at the end of one phase should act as input in the planning of the next and/or future phases.

The process continues until the candidate is working at the level required for registration in each outcome and as a whole.

Each activity is described in company and generic terms. Company terms encompass the names of specific plants, processes, sites etc., while generic descriptions include terms such as design, troubleshooting, construction and commissioning.

5. EMPLOYER COMMITMENT AND UNDERTAKING

Considerable onus rests on the employer to provide all the elements required to support candidates in their training and experience towards professional registration. As outlined in policy document **R-01-POL-PC**, employers should enter into a C&U with ECSA. Under a C&U, the employer commits to train candidates to the standard required for registration in an identified Professional Category. Where applicable, the candidate will be trained under the C&U programme. The training process may involve structured activities that include induction and training courses on specific skills or technologies. The candidate also participates in self-initiated IPD activities. In entering a C&U, the employer signifies intent to fulfil the following:

- Structure and execute the training of candidates in accordance with the competency statements, policies and guidelines laid down by ECSA for the applicable category of registration.
- Ensure adequate supervision of candidates by Registered Persons.
- Register mentors with ECSA and ensure adequate mentoring of candidates.
- Provide regular guidance for the candidates through competent supervisors and mentors.

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The benefit to the employer is the development of professionals in the shortest possible time after graduation (about 3–4 years), thus increasing the organisation's capacity and attractiveness in terms of enticing high calibre graduates.

The employer C&U agreement is included in ***Appendix A*** for reference purposes. Employers should complete the separate C&U agreement that is available from ECSA, published on www.ecsa.co.za. Employers should include their logo in the top left block.

5.1 Signatories for C&U

The employer should note several details when signing this agreement.

- ECSA requires the employer's Chief Executive Officer (CEO) to register the C&U. Since ECSA views these 'expressions of intent' very seriously, Council must be satisfied that the expressions of intent represent corporate policy and that top management assumes ultimate responsibility for the proper implementation of this policy. Thus, it is expected that the CEO will issue the necessary directives to those charged with this responsibility.
- Details of the mentor champion and the human resource personnel responsible for coordinating candidate training and experience should also be recorded.
- A signed Mentor C&U must be submitted as part of the Employer C&U.

5.2 Duration of C&U

An Employer C&U is valid for 5 years from the date of signing.

5.3 Registration number for a C&U

Once signed, each C&U is allocated a registration number that should be quoted by all persons when applying for registration as Professional Engineers.

5.4 Training Programmes

Employers are encouraged to develop detailed *Training and Mentoring Programmes* that are appropriate for their own circumstances, since these represent an internal management tool to achieve the outcomes. The *Training and Mentoring Guide* document, **R-04-T&M-GUIDE-PC**

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stipulates the *Training and Mentoring Programme Process Tool/Technique* to be utilised as part of training and experience.

5.5 Deregistration of C&U

The credibility of the employer's C&U is measured through an ongoing verification process whereby the quality of applicants' training and experience and the level of their professionalism is assessed. In the case of an employer's consistent failure or inability to honour its C&U, the situation may arise where ECSA has no alternative but to deregister the employer's C&U. Prior to deregistration, ECSA will give reasonable notice of its intention to do so and will permit the employer reasonable time to rectify any deficiencies.

6. MENTOR COMMITMENT AND UNDERTAKING

As outlined in document **R-04-T&M-GUIDE-PC**, in agreeing to assist a candidate, a mentor must commit to the following duties:

- The mentor must participate in the planning and advise on the suitability of the programme of work and experience for the candidate's development. Training tasks or phases must be planned to ensure that the candidate develops towards the competency standard required for the category of registration.
- The mentor must ensure that the candidate is exposed to increasing demands in problem-solving, management, impact assessment and mitigation, consideration of ethical issues, judgement and responsibility.
- The mentor must ensure the candidate completes the agreed training.
- If the mentor is not the candidate's supervisor, the mentor must liaise with the supervisor to ensure that the work assigned to the candidate is consistent with the training objectives.
- On completion of each agreed task or work period, the mentor must receive a report from the candidate and review the outcomes achieved, taking note of the objectives.
- The mentor must assist the candidate to decide when he/she is ready to apply for registration and must assist with the actual application.

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Refer to document, **R-04-T&M-GUIDE-PC** for *Mentee Distinctive Responsibilities of a Mentor*, *Mentee and Supervisor* and *Mentee Benefits on Mentoring Programme* under the section on *Roles and Responsibilities*.

The Mentor C&U agreement is included in ***Appendix B***. A Mentor C&U for each mentor must be signed and submitted to the employer for submission with the Employer C&U.

6.1 Duration

The Mentor C&U for the stated employer is valid for 5 years from the date of signing.

6.2 Multiple employers

Mentors acting as external mentors for more than one employer must sign a separate C&U for each employer with whom they are contracted.

6.3 Multiple categories

The mentor must be professionally registered in the appropriate category but may mentor candidates in other categories in the absence of other registered professionals serving as mentors. In the case of mentors supporting more than one category of registration, each category must be listed in the Mentor C&U.

6.4 Conflict of interest

Every effort must be made to ensure that there is no conflict of professional interest. Should the mentor act as an assessor or a reviewer for ECSA, the mentor should declare a conflict of interest as soon as an application is received from one of his/her candidates to assess or review.

6.5 Termination

Mentors must advise ECSA if they cease to be a mentor for the employer. Mentors must cease to offer mentoring services in the event that their professional registration lapses or is withdrawn for any reason.

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7. ECSA COMMITMENT

In calling on employers and mentors to undertake the development of Engineering Professionals, ECSA commits to keeping policies, standards and guidelines relevant and up to date, in addition to offering advice and a range of support as outlined in the Employer C&U.

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REVISION HISTORY

Revision number	Revision date	Revision details	Approved by
Draft 01	7 April 2015		JIC Working Document
Draft 02	24 April 2015		JIC Working Document
Draft 03	13 May 2015	Elements combined from previous guide to produce the Process document R-11-P. Added: • Documenting Training and Experience • Secondments • Reporting to management • Candidate programme outline from document R-01-P • Overview of Competency Standards updated • Mentor C&U • Employer C&U Cosmetic changes highlighted by JIC members addressed	JIC Working Document
Draft 04	24 May 2015	Additional updates suggested by JIC relating to Supervisors, Training and Experience	JIC Working Document
Draft 05	8 June 2015	Approved by JIC	JIC Working Document
Version 1.0	1 July 2015	Approved by TC	Approved by JIC
Version 1.0	27 July 2015	Approved by JIC	Approved by TC
Version 1.1	12 October 2015	Approved by TC via Round Robin	Approved by JIC

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Revision number	Revision date	Revision details	Approved by
Version 1.1	12 November 2015	Approved by JIC	Approved by TC via Round Robin
Revision 2	10 October 2019	Routine review and alignment with the new Policy and Standards Framework on ECSA Policies. Approval	RPSC
Rev 3 Draft A	15 Aug 2023	• The following heading “Roles and Responsibilities” has been revised to “Roles and Stakeholders”. A new heading, “Training under a candidacy programme” with the following sub-headings, “A Candidacy Programme”; “Overview Of Competency Standards”; “Evidence Required for Competent Performance”. • The document further added Figure 2, Degree of Responsibilities for a Mentee Aligned with Progression Levels. • The document provides further information regarding each DoR level, which includes a series of sequential activities. • The subheading has been updated and now includes detailed instructions and recommendations for candidates to plan their progression levels, document their training and relevant experience, and review their progress in accordance with the DoR.as indicated in section 4	Reviewed by Working group
Rev 3 Draft B	13 Dec 2023	Document revised with WG	RI BU and WG

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Revision number	Revision date	Revision details	Approved by
Rev 3 Draft C	18 Jan 2023	Document revised with WG and Registration BU	RI BU, Registration BU and WG
Rev 3 Draft D	30 Jan 2024	Reviewed and checked	Executive: RPSC
Rev 3 Draft E	08 Feb 2024	Approval	RPSC
Rev 3 Draft F	25 Mar 2024	IEA for review and alignment	EIA Team
Rev 3 Draft G	04 April 2024	Reviewed and checked	Executive: RPSC
Rev 3	17 April 2024	Approval	RPSC

The Process for:

Training engineering candidates towards professional registration under a Commitment and Undertaking

Revision 3 dated 17 April 2024 and consisting of 31 pages reviewed for adequacy by the Business Unit Manager and approved by the Executive: Regulatory Services & International Relations (RSIR)

Business Unit Manager — Date: 21 May 2024

Executive: RSIR — Date: 22 May 2024

This definitive version of the policy is available on our website.

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Appendix A: Employer Commitment and Undertaking

EMPLOYER COMMITMENT AND UNDERTAKING (C&U) TO DEVELOP CANDIDATE ENGINEERING PROFESSIONALS

1. Parties

This C&U is between:

Name of Employer/Company: _____

Postal address: _____

Email: _____

Telephone: _____

and

ECSA:	Engineering Council of South Africa (ECSA)
Postal Address:	Private Bag X691, BRUMA, 2026
Email:	engineer@ecsa.co.za
Telephone:	011 607 9500

2. Scope

The Engineering Council of South Africa regulates the engineering profession by ensuring that only competent, accountable persons are registered to perform engineering work at the appropriate level. The ECSA, therefore, calls on Employers to commit to training Candidates to the standard required for registration in a Professional Category in accordance with the requirements of the ECSA.

3. Duration

This Commitment and Undertaking is valid for 5 years from the date of signing.

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4. Responsibilities

4.1 The Employer

*The **Employer** hereby confirms that it is their expressed intention, in so far as they are able, to*

- Implement a Candidacy Programme as outlined in document **R-01-POL-PC**, the *Training and Mentoring Guidelines* outlined in document **R-04-T&M-GUIDE-PC**, the *Discipline-specific Training Guidelines* for the disciplines and categories concerned (documents **R-05-XXX-PE/PT/PN** or **R-05-XXX-PCE**) and document **R-11-PRO**.
- Ensure that engineering graduates register as candidates in the appropriate categories.
- Provide structured training and experience against ECSA Competency Standards as defined in the **R-04-T&M-GUIDE-PC** and outlined in the *Discipline-specific Training Guidelines* for the categories and disciplines of engineering (documents **R-05-XXX-PE/PT/PN** or **R-05-XXX-PCE**), supported by the mentors attached to this agreement.
- Provide a variety of engineering activities (including rotation/secondment where necessary) and ensure the candidate's levels of responsibility increase over time.
- Ensure that candidates plan for and are able to participate in IPD activities.
- Allocate professionally registered supervisors to oversee and take responsibility for the work done by candidates in terms of section 18(4) of the EPA.
- Allocate/appoint professionally registered internal or external mentors (preferably for the duration of the candidacy programme to ensure continuity) as referred to in ***Appendix A***.
- Ensure that mentors sign the Mentor C&U and attach it to this Employer C&U.
- Maintain a register of mentors and update ECSA regarding any changes.
- Ensure that mentors are conversant with ECSA's policies, standards and guidelines.
- Ensure that candidates document evidence of planning, training and experience, mentor meetings and assessment for each developmental phase.
- Ensure that the progress of the Candidate is continuously assessed by supervisors and mentors and that they sign off reports as required.
- Assist candidates in their decisions regarding their readiness to apply for registration and advise on the preparation of the actual applications.

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- Create the opportunity and an environment that is conducive to effective liaison between candidates and their mentors.

4.2 ECSA

ECSA *hereby confirms its expressed intention, in so far as it is able, to do the following:*

- Provide *Training & Mentoring Guidelines*.
- Provide standardised reporting tools and techniques.
- Streamline the application process for professional registration through an online system.
- Provide access to a Mentor-Connector portal.
- Encourage Voluntary Associations (VAs) to provide mentor training and external mentors where required.
- Recognise mentoring as an IPD activity for becoming registered professionals.
- Provide a registration support helpline.
- Provide registration presentations on request.
- Provide guidelines on recommended professional development activities.
- Issue a certificate of recognition to companies entering into a C&U agreement.
- Publish details of companies that have signed a C&U agreement.
- Lobby support from government and Sector Education and Training Authorities (SETAs) to provide funding towards Candidacy Programmes.

This list is not exhaustive and may be expanded upon from time to time to provide additional support as required.

5. Deregistration

ECSA has the discretion to deregister this Employer C&U should the training and experience provided by the Employer not satisfy the ECSA requirements. This is with the provision that ECSA has given reasonable notice of its intention to do so and has given reasonable time in which any deficiencies can be rectified.

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6. Changes in mentoring

The employer must advise ECSA of changes in mentors and provide the names of any replacements on the template in ***Appendix A***. This must be submitted with the associated Mentor C&U agreements.

7. Execution

Signed at:	Signed at
On this day of _____20____	On this day of _____20____
For ECSA:	**For the Employer:**
_____	_____
Signature	Signature
_____	_____
Name	Name
_____	_____
Position	Position

Appendix B: Details of Registered Professionals who have signed the mentor Commitment and Undertaking

Name of Employer/Company: _____

C&U Contact: _____

Champion/Chief: _____

Mentor: _____

Position: _____

Email: _____

Telephone: _____

Cell: _____

Contact/HR/Training Manager (if applicable): _____

Position: _____

Email: _____

Telephone: _____

Cell: _____

The table below is for a list of registered professionals who have signed the Mentor C&U and who are willing and able to act as mentors to engineering candidates. The latest copy of each signed Mentor C&U is attached to this agreement.

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Please insert the names of registered professionals in your organisation who have signed the Mentor C&U and who are willing and able to act as mentors to engineering candidates.

Full Name	ECSA Registration No.	Category*	Discipline**	Internal/ External (I/E)
+				

* Pr Eng, Pr Tech Eng, Pr Techn Eng, Pr Cert Eng

** Aeronautical, Agricultural, Chemical, Civil, Electrical, Industrial, Mechanical, Metallurgy, Mining

+ Add more rows as required. Kindly repeat the Employer/Company name at the top of each continuation page.

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Appendix C: Mentor Commitment and Undertaking

MENTOR COMMITMENT AND UNDERTAKING TO DEVELOP CANDIDATE ENGINEERING PROFESSIONALS

I, the undersigned,_____, in my capacity as

_____Mentor of_____

Internal/External: *Name of Employer:*

hereby wish to register my Commitment and Undertaking to mentor candidates in accordance with the requirements of the standards, policies and guidelines of the ECSA for the Engineer/ Technologist/Technician/Certificated Engineer category of registration (*delete whichever is not applicable*) in the engineering discipline: _____ (e.g., civil, electrical, mechanical).

I hereby confirm that it is my expressed intention, in so far as I am able, to do the following:

- Be conversant with the ECSA requirements for a candidacy programme as outlined in document **R-01-POL**, the *Training and Mentoring Guidelines* (document **R-04-P**), documents **R-05-XXX-PE/PT/PN** or **R-05-XXX-PCE** and document **R-11-PRO**.
- Ensure that engineering graduates register as candidates in the appropriate categories.
- Participate in the planning and advise on the suitability of the programme of work and experience for candidate development. Training tasks or phases will be planned to ensure that the candidate develops towards the competency required for registration in the appropriate category according to the **R-02-STA-PE/PT/PN** or **R-02-STA-PCE** and documents **R-05-XXX-PE/PT/PN** or **R-05-XXX-PCE**.
- Ensure that candidates are exposed to increasing demands in problem-solving, management, impact assessment and mitigation, consideration of ethical issues, judgement and responsibility.
- Ensure that the candidates complete the agreed training.
- Ensure that candidates plan for and are able to participate in IPD activities.
- Liaise with supervisors to ensure that the work assigned to candidates is consistent with the training objectives if the mentor is not the candidate's supervisor.

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- Ensure that candidates document evidence of planning, training and experience, mentor meetings and assessments for each developmental phase.
- Allocate time to review and comment on reports received upon completion of each task or phase.
- Meet with candidates and their supervisors regularly (preferably quarterly or at least once every 4 months) to review progress, assess the outcomes achieved and agree on new activities and outcomes to be enacted.
- Report progress to management and alert management to situations where training is inadequate for professional registration.
- Offer support as required – ongoing engagement may be a combination of one-on-one sessions and telephonic and electronic communications.
- Assist candidates in their decisions regarding readiness to apply for registration, advise on the preparation of the actual applications and serve as a referee if requested to do so.

I will advise ECSA should I cease to be a mentor for the above employer. I understand that I may not offer mentoring services should my professional registration lapse or be withdrawn for any reason. I acknowledge that I may not serve as an ECSA assessor or reviewer for any candidates that I have mentored.

Signed at_____on this_____day of_____20___

Signature	Email address	Registration number
Tel. number (home)	Tel. number (work)	Cell number

Physical address

Postal address

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