



TRUSTED SKILLS

REVIEWER GUIDE



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Get Started

There are endless ways to develop skills - formal education, work experience, volunteering, advice from mentors, and many other forms of professional development. But how can a candidate prove to potential employers that they have the skills they're looking for?

The answer is **Trusted Skills professional certification**.

Trusted Skills is different because it only judges the evidence of skills, not how they were developed. *Trusted Skills* follows the adage "seeing is believing." This starts (and finishes) with a candidate proving to a certified *Trusted Skills* reviewer that they can do what they say they can do.

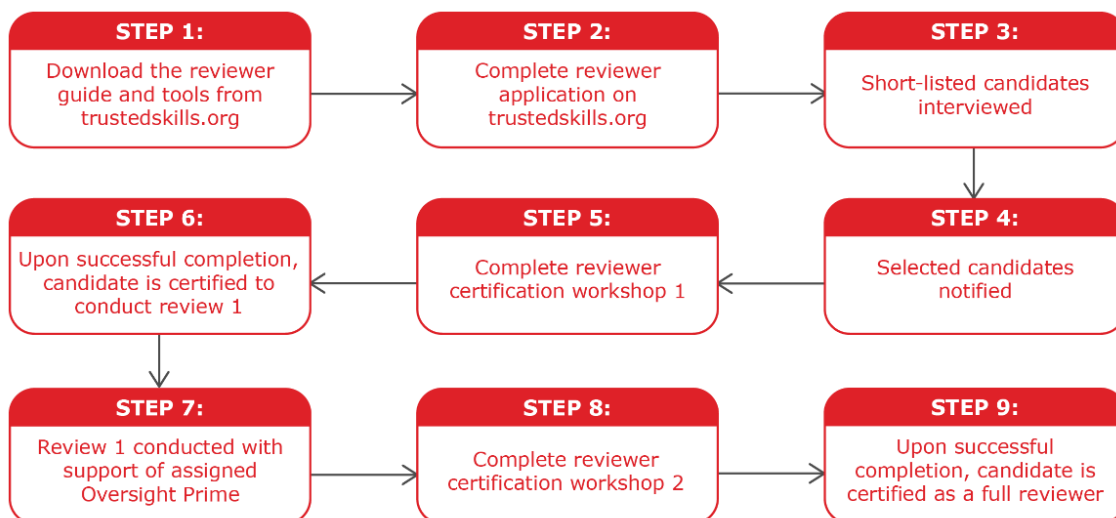
This year, Calgary Arts Development Authority, in partnership with Calgary Economic Development, and the Calgary Marketing Association are prototyping **four Trusted Skills professional certifications in marketing**: marketing management; digital marketing; content creation; creative thinking.

Become a certified reviewer

Trusted Skills is built on trust and legitimacy. This trust and legitimacy are anchored in the trust and legitimacy of the *Trusted Skills* reviewer.

The role as a certified reviewer is to assess whether a candidate's evidence has met the minimum criteria for one of these four certifications. Therefore, you must understand the explicit detail associated with each certification criteria and interpret the evidence submitted by a candidate. Based on your overall assessment of the certification criteria and the associated evidence, you will make a recommendation on the certification standard achieved.

Trusted Skills program incorporates a rigorous process for the selection, training, and certification of our reviewers. This includes you successfully completing two certification workshops. Upon successful completion of the second workshop, you will become certified reviewers for their designated certification. *Trusted Skills* reviewers are **compensated \$300** for each completed review. **Review this guide and apply to become a certified *Trusted Skills* reviewer today.**





SECTION 1

UNLOCKING POTENTIAL

Hiring a new employee is the biggest risk of any company.

Employers look to reduce the risk by asking for evidence that a candidate has the skills to do a job. Some fields have introduced skills certification to manage this risk, but for most jobs there is no current path to certifying skills.

Think about it. A doctor's skills are certified. An accountant's skills are certified. Most skilled trades, like electricians or plumbers, are certified. Employers trust this certification because they trust the organization and professionals awarding it.

But the problem is for most skills there is no trusted certification process. This is the *problem Trusted Skills professional certification* is designed to solve.

WHAT IS A SKILL?

It wasn't long ago when we could decide on one career path or job. That's not the case anymore. Many jobs or career paths available today may not exist tomorrow or next year. To match this change, regardless of whether you are an employer or a job candidate, it is critical for us to shift from thinking about jobs to thinking about skills. The right skills will allow us to adapt and change as quickly as the world around us.

There are two major types of skills:

Enabling Skills

Enabling skills (sometimes called soft skills or transferable skills) are what allow you to adapt and adopt new job-specific skills. Examples of enabling skills include communication skills, problem solving skills, collaboration skills, and core literacies (e.g., technology literacy).

Job Skills

Job-specific skills are the skills you need to complete a specific job, whether welding, teaching, engineering, or soccer.

Historically, job-specific skills were the most valued by employers as they were essential to generating short-term economic value. Today, many employers, from accountants to skilled trades to engineering, use specific skills frameworks to find the right employee to join their team. These frameworks define both a common language and mechanisms to assess the skill.

The challenge is that job-specific skills are highly contextual, and in today's fast-paced world, they possess an increasingly short lifespan. In the past, a trade learned as a teenager could be developed and refined through a lifetime of experience and maintain its value.

Today, job-specific skills often become dated and require continual training to maintain their value. Look at the table below based on a World Economic Forum forecast of skill demand.

REINVENTING SKILL CERTIFICATION

There are endless ways to develop skills, through formal education, work experience, volunteering, advice from mentors, or self-directed professional development.

The most valuable skills don't result from just one of these experiences — it's about how they work together.

The challenge is skill certification is often integrated with skill development. Consider the structure of accredited learning. An instructor designs and teaches a course, and upon completion of the course individuals are assessed whether they meet the learning outcomes of the course. The integrated model of skill development and certification constrains both the capacity and innovation of skill development.

To overcome this, a second model of skill certification has emerged. In this model, skill development and skill certification are decoupled. An example of decoupled certification is a driver's license. Certifying an individual's skill to drive a car is fully decoupled from how they developed the skill to drive. As a result, the government solely focuses on defining and testing whether a candidate possess the skill to be certified to drive a car. In contrast, people have an unlimited number of pathways to develop their skill, from family and friends to professional instruction.

Skill Development



Albertan develops skill to drive

Skill Certification



Government certifies this skill

Decoupling Development from Certification

Today, this decoupled skills certification model has been adopted by a range of professional fields and skilled trades. One of the benefits of decoupling skill development from skill certification is the potential to unlock both diverse forms of skill development, including certified, non-certified and informal, and innovative approaches to skill development.

The *Trusted Skills* model adopts decoupled skill certification, designed to unlock the potential of Calgary's vast skill development system.



SECTION 2

TRUSTED SKILLS PROFESSIONAL CERTIFICATION

Trusted Skills builds on the principles from other fields from accounting to trades — professionals certifying professionals.

For employers, this means a job candidate has been assessed by a *Trusted Skills* reviewer that they have the skills they claim to have. For candidates, it means you've been certified in the skills you claim to have and that an employer needs.

In 2022, [Calgary Arts Development Authority](#), in partnership with [Calgary Economic Development](#), and the [Calgary Marketing Association](#) are prototyping four *Trusted Skills* professional certifications in marketing:

Marketing Management

This first certification verifies a candidate's foundational marketing skills in the following areas:

1. Marketing insights
2. Audience insights
3. Marketing management
4. Marketing communications



Content Creation

The Content Creation certification verifies that an individual has the skill to plan, create, and curate content, including text, visual, video, and audio, to support a marketing program.



Digital Marketing

The Digital Marketing certification verifies that an individual has digital marketing skills. This includes using multiple forms of digital media to achieve a marketing goal. A candidate must show skill in the following:

1. Digital analytics
2. Digital advertising
3. Social media
4. Web development



Creative Thinking

The Creative Thinking certification verifies that a candidate possesses skills to understand complex problems, gather inspiration for potential solutions, generate ideas, make those innovative ideas tangible, test those ideas to learn more, and tell the story of an insightful change that they have developed. To be certified, a candidate must demonstrate skill in the following areas:

1. Showing curiosity
2. Gathering and assessing relevant information
3. Managing ambiguity
4. Developing and testing creative ideas
5. Storytelling





IT'S STARTS WITH TRUST

Trusted Skills will only be valued by employers if they perceive it as trusted and legitimate. As a result, *Trusted Skills* assessment is anchored to four pillars:

1. Certification Governance
2. Concise Certification Criteria
3. Certification Rigour
4. Certification Evidence

GOVERNANCE

The **ISO 17024** standard defines explicit governance standards that must be met to ensure rigour and fairness. Consistent with this standard, the certifying body is accountable for defining and maintaining oversight of all *Trusted Skills professional certifications*, including approving certification criteria and the skill certification processes, and appointing certified *Trusted Skills* reviewers.

For the prototype phase, the certifying body is **Calgary Arts Development Authority**. The certifying body is operationalized through a *Certification Oversight Board* (referred to as the Board). This Board is accountable for delivering the mandate of the certifying body.

CONCISE CRITERIA

Trusted Skills assessment is anchored to comprehensive certification criteria. This certification criteria defines the criteria and evidence that will determine if you fulfill the defined certification requirements. The certification criteria ensure a consistent framework for assessment.

RIGOROUS ASSESSMENT

The *Trusted Skills* assessment process complies with ISO 17024 standards by incorporating mandatory elements of assessment, including objectivity, documentation comparability, and capacity to accommodate special needs.

EVIDENCE

Trusted Skills professional certification adopts a rigorous evidence-based management approach to certification. For *Trusted Skills*, "evidence" is the information, facts, or data you submit to support your skill claim. Therefore, your job primarily as a reviewer is to assess and judge the quality of the evidence provided by a candidate. This is operationalized at a skill level in the following ways.



1. What evidence must I see to have confidence that this candidate possesses this skill?	We guide the reviewer by providing examples of different forms of evidence that could be used to verify that this candidate possesses this skill.
2. Does the submitted evidence explicitly offer concise proof of the specific skill being Certified?	This requires you to evaluate whether there is a direct link between the evidence and the skill you are certifying.
3. Do I trust the submitted evidence?	This requires you to judge the validity of the evidence and its explicit link to a candidate's skill. For example, a candidate may submit a project they worked on as part of a team but no evidence that they were responsible for a specific component.
4. Once I aggregate all the evidence, does it provide explicit evidence of certification skills?	This is where your expertise is most important. Each certification includes dozens of individual skill criteria. However, sometimes the interaction of these skills offers the best evidence of a candidate's true capability. Your expertise will allow you to consider the evidence of the individual skills while also stepping back and looking at the evidence of the interaction of these skills.

A candidate's evidence can come from the following areas.

Professional Evidence

This incorporates all evidence developed in a professional capacity. This could be as an employee or in their own business. It's important to remember that much of the work a candidate did professionally may be proprietary and confidential.

Examples of Professional Evidence

- Descriptions about their current and past professional roles explicitly linked to skills
- Example of a project completed for an employer that demonstrates the skill
 - Samples of documentation a candidate developed or contributed to, e.g., reports, presentations, blueprints, websites, schematics, lesson plans, order forms, or management systems
 - Samples of creative outcomes a candidate led or contributed to
 - Samples of video or audio content a candidate developed or contributed to
 - Sample of marketing programs a candidate led or contributed to
 - Sample research a candidate led or contributed to
 - Samples of a new product or service a candidate designed
- Customer satisfaction acknowledgement
- Details of the ways their performance has been measured, like sales volumes, client loads, safety records, and overtime a candidate has put in
- Performance evaluations and annual reports
- Military records and awards
- Evidence of training taught



- **Examples of work completed if a candidate is self-employed**

- Business plan
 - Marketing materials
 - Project completed for a client
-

Skill Development Evidence

This is evidence associated with skill development. This includes formal education and other forms of learning, like workshops or conferences.

Examples of Skill Development Evidence

- Professional designation, certifications, and corresponding evidence linked to a skill
 - Educational transcripts explicitly linked to skills
 - School project that explicitly demonstrates skill
 - Scholarly research project that explicitly demonstrates skill
 - Professional development workshops and activities with an outcome that explicitly demonstrates skill (including detailed description)
 - Details of any vocational competitions a candidate has participated in
 - Conferences, workshops, committees, and projects that a candidate has been involved with and linked explicitly to a skill
 - Courses or training that a candidate completed and linked explicitly to a skill
-

Community Evidence

This incorporates all evidence developed in a voluntary capacity. Many examples from professional evidence may also be relevant for community evidence. Similarly, some of this voluntary work may be proprietary and confidential.

Examples of Community Evidence

- Descriptions about a candidate's current and past voluntary role explicitly linked to skills
- Example of a project completed in a volunteer capacity that demonstrates the skill
 - Sample of documentation a candidate developed or contributed to, e.g., reports, presentations, blueprints, websites, schematics, lesson plans, order forms, or management systems
 - Samples of creative outcomes a candidate led or contributed to
 - Samples of video or audio content a candidate developed or contributed to
 - Sample of marketing programs a candidate led or contributed to
 - Sample research a candidate led or contributed to
 - Samples of a new product or service a candidate designed



Personal Evidence

This incorporates all evidence associated with personal interests.

Examples of Personal Evidence

- Example of work completed for personal interest that demonstrates the skill
 - Photography explicitly linked to skills
 - Writing samples explicitly linked to skills
 - Published content explicitly linked to skills
 - Blogs/vlogs explicitly linked to skills
 - Podcasts explicitly linked to skills
 - Social media posts explicitly linked to skills
-

Other Evidence

Evidence is highly contextual and may be unique. Examples include:

- Security clearances explicitly linked to a skill
- An award that demonstrates evidence of the skill
- Past correspondence or assessments that provide evidence of a skill
- Evidence developed by a candidate explicitly to demonstrate their skill for the certification process (this may be in the case where a skill may incorporate a synthesis of skills or where the only evidence a candidate has is proprietary and cannot be shared with the reviewer)



SECTION 3

THE ASSESSMENT PROCESS

The *Trusted Skills* assessment process for reviewers is composed of the eight steps below.

YOUR ROLE AS REVIEWER

You are the Subject Matter Expert

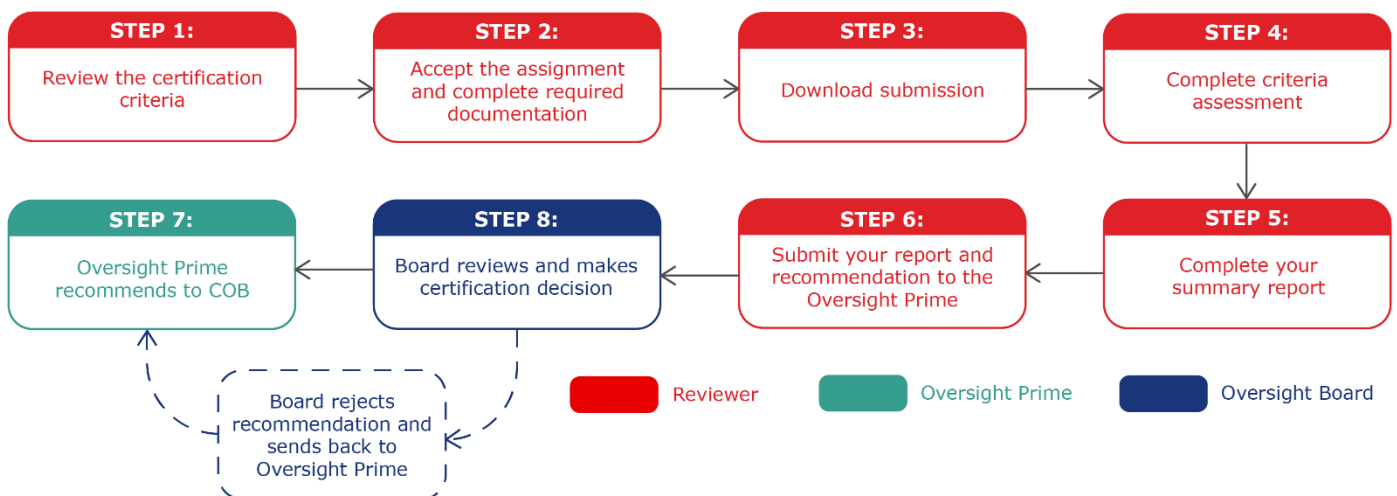
Your role is as a certified subject matter expert. You're appointed to assess whether a candidate has met the minimum certification criteria. Therefore, you must understand the explicit detail associated with each certification criteria and interpret the evidence submitted by a candidate. Based on your overall assessment of the certification criteria and the associated evidence, you will make a recommendation to the Certification Oversight Board (the Board) on one of three levels of certification standard achieved.

Your Role is to Recommend

As a subject matter expert, your role is to make a recommendation to the Board based on your expert assessment of the evidence relative to the certification criteria. However, the Board is solely accountable for making the final certification decision.

THE ASSESSMENT PROCESS

Trusted Skills professional certification follows a consistent eight-step process for reviewers.



**STEP****1****Review the criteria for the certification you have been assigned to review.**

You must be familiar with three elements:

1. The concise certification criteria
2. The skill level required to meet the minimum standard for the defined certification
3. The acceptable forms of evidence for each skill

STEP**2****Accept the assignment and complete required documentation**

If you're comfortable in accepting the reviewer assignment and are confident you can complete your assessment within 14 business days, proceed to review, sign, and submit the required documentation before initiating the assessment process.

1. Reviewer Code of Conduct
2. Reviewer Conflict-of-Interest Declaration

STEP**3****Download submission**

Download the required components of a candidate's submission from trustedskills.org

ePortfolio: The ePortfolio is required for all three levels of certification. It follows the adage, "Show, don't tell," and includes tangible evidence of a candidate's skill as defined in the certification criteria and associated testimonial.

Advanced Skills Case Study: The certification case study is required only for level 2 advanced certification and allows a candidate to demonstrate the synthesis of their skills in real-time.

STEP**4****Complete criteria assessment**

Using the criteria matrix, assess the candidate's evidence and its alignment to the certification criteria. Based on this, you will assign each skill one of four standards:

- Level 0: No evidence of basic skill level
- Level 1: Evidence of basic skill
- Level 2: Evidence of advanced skill
- Level 3: Evidence of expert skill

STEP**5****Complete your summary report**

Based on your assessment, prepare your summary report using the template provided. This standardized template ensures clear alignment between the certification criteria, a candidate's evidence, your observation, and your recommendation.

In this summary report, you will summarize your evidence-based recommendation. This recommendation will offer guidance to both the Board and the candidate on your interpretation of the application. It highlights major themes and corresponding evidence that contributed to your recommendation. This will also provide an overview of the strength and weakness of the candidate's application focusing solely on the evidence and whether it met the defined criteria.

**STEP****6****Submit your report**

Your next step is to submit your report to the assigned Board prime (“prime”). The prime is a qualified member of the Board assigned to provide oversight for each candidate participating in the prototype. The prime is responsible for making a final certification recommendation to the Board.

STEP**7****Oversight prime makes recommendation to board**

The prime will assess your report and will make one of two recommendations to the full Board.

STEP**8****Board makes decision**

The Board will assess the prime’s recommendation and proceed with one of two scenarios:

Scenario 1: Oversight Board Accepts Reviewer Recommendation

If the prime accepts your recommendation, the Board can proceed directly to a certification vote. Once the Board has achieved a majority vote, the final decision is communicated to the candidate.

Scenario 2: Oversight Board Amends the Reviewer Recommendation

If the prime does not support your recommendation, the prime must provide evidence to the full Board. In this scenario, the Board can make one of three decisions:

1. Vote to accept the prime recommendation
2. Vote to accept the reviewer recommendation
3. Vote to request the prime and reviewer to develop a consensus recommendation and resubmit to the Board

Consensus recommendation: If a consensus recommendation is achieved, the Board will assess the submitted consensus recommendation and may proceed immediately to a vote. If a majority of the Board vote to accept the recommendation, the Board will communicate its decision to the candidate.

No consensus recommendation: If no consensus recommendation is achieved, the Board will assess the competing recommendations and call a vote on the standard to be awarded. Once a majority vote is achieved, the Board will communicate this decision to the candidate.



SECTION 4

COMPLETING THE ASSESSMENT

ASSESSMENT BASICS

Assessing is always challenging. Below are the basic criteria of good assessment.

1. Focus only on the defined certification criteria and associated evidence.
2. Focus only on the submitted evidence. Your job is not to make assumptions beyond what was submitted.
3. Justify your recommendation with concrete evidence and specific examples.
4. Be specific so the candidate can use this process to guide future professional development.
5. Be thorough. Every skill in the certification is important.
6. Be professional and respectful.
7. If you have questions, ask your Oversight Prime for guidance.
8. Submit your report within 14 business days after you have accepted the review job.

Similarly, below are dimensions that may lead to a poor assessment.

1. Don't deviate from the skill certification criteria in your assessment. This is your only guide.
2. Don't deviate from the evidence submitted. Your job is not to "read between the lines."
3. Don't identify issues outside of the scope of the certification criteria.
4. Don't get distracted by going deep into professional development recommendations. Your role is to assess the evidence submitted; you're not their professional mentor.
5. Don't focus on typos and grammar beyond that explicitly defined in the certification criteria of a specific certification. Instead, you may identify writing quality as an area requiring improvement. If the writing quality is at a level that compromises your ability to conduct your review, raise this immediately with the Board.
6. Don't make assumptions. If you're uncertain about something, ask the Oversight Prime. Their role is to support you.

THE ePORTFOLIO

What is the ePortfolio?

The ePortfolio is a **private and secured** Dropbox including all a candidate's evidence they possess the skills associated with a respective certification. The ePortfolio is structured at the skill level, so a candidate can directly link a skill to specific evidence. This structure will accelerate the assessment process for candidates and you.

A candidate's ePortfolio has three separate tabs.



Tab 1: *Trusted Skills* Biography

This is a one-page summary for the candidate to introduce themselves. The goal of the biography is to summarize their background and its link to the skills they're applying to have certified.

Their biography is designed to deliver on the following five goals:

GOAL	
1	<p>A Basic Introduction</p> <p>Who are they and how do they identify as a professional?</p>
GOAL	
2	<p>Describe their Skill's Journey</p> <p>They will concisely highlight their skills journey. This will provide important context for you when reading their self-declaration of skills and reviewing their reflective exercise. This is not a list of jobs; rather, it highlights life experiences and their contribution to their skill development. This may include professional, personal, and volunteer experiences, and education. The <i>Trusted Skills</i> process recognizes all experiences contribute to skill development, so this is their opportunity to concisely tell their personal story.</p>
GOAL	
3	<p>Highlight Skill Achievements</p> <p>Building on their skill's journey, the next section highlights specific achievements or milestones that offer strong evidence of the skills defined in the certification criteria. This could include an academic achievement, a program at work that the candidate is proud of, an award, or a certification.</p>
GOAL	
4	<p>Introduce their <i>Why</i></p> <p>Up until now, their biography focused on <i>what</i> the candidate has done. This final section focuses on the <i>why</i>. The <i>why</i> are the values and passions that drive the candidate to get up every morning. The <i>why</i> can often take the form of a personal mission statement. This section will provide important context as you assess their evidence and its link to their passions and values. This section provides the foundation for the <i>Trusted Skills</i> Testimonial section of their ePortfolio where the candidate will be able to expand deeper into the <i>how</i> and <i>why</i> of their skills journey.</p>
GOAL	
5	<p>Link to their Bigger Story</p> <p>Now that the candidate has explained their skills journey and introduced their passions and values, they will close their biography by guiding you concisely to more information about themselves. This may be a LinkedIn profile or a resume. Regardless of format, this section will provide you with an additional layer of information about their journey, including education, professional, community and life experiences.</p>



Tab 2: Self-Declaration of *Trusted Skills*

The self-declaration of *Trusted Skills* is a crucial component of their ePortfolio. This self-declaration requires the candidate to provide evidence of each of the skills defined in the certification criteria. Importantly, it requires the candidate to sign and certify the accuracy of their submission and the evidence provided. *Trusted Skills professional certification* is only valuable if it is recognized as legitimate. Therefore, you will be assessing every component of their self-declaration and verifying the evidence provided.

This self-declaration incorporates three components:

Column 1: Certification Criteria	Column 2: Frequency	Column 3: Skills Evidence
<p>Copy the skill certification criteria.</p>	<p>The candidate will estimate how often they applied this skill in any capacity (professionally or personally) over the past <u>five years</u>. For the ePortfolio, this is defined at four possible levels:</p> <ol style="list-style-type: none"> 1. Never: The candidate has never applied this skill over the past five years. 2. Occasionally: The candidate has applied this skill occasionally over the past five years. For example, the candidate may be involved in annual planning involving research, so the candidate conducted primary research once per year. 3. Often: The candidate has applied this skill often over the past five years. For example, the candidate may be involved in quarterly planning involving research, so the candidate conducts primary research each quarter. 4. Very Often: The candidate has applied this skill very often over the past five years. For example, the candidate may be the director of research, so the candidate is involved in primary research as part of their core responsibility. <p>This certification process recognizes that roles evolve and change. Therefore, the skills a candidate used three years ago may be very different today. In this case, the candidate would make a judgement on the frequency. Frequency is important for the assessment because it provides you with a sense of their depth of skill in an area relative to others. This will assist in your interpretation of their submitted evidence.</p>	<p>This is the most important component of their entire <i>Trusted Skills</i> application.</p> <p>The candidate will provide a summary of the evidence they have to support this skill.</p> <p>This evidence will be archived in the evidence folder of this tab for you to consider.</p> <p>The candidates' items in their ePortfolio may demonstrate more than one skill in their certification criteria.</p>



Tab 3: *Trusted Skills Testimonial*

The testimonial component of the candidate's ePortfolio allows the candidate to provide additional context and insight for you into how the candidate developed their skills and its link to their evidence. This is critical for the assessment as the relevance of the evidence to their skill development may not be immediately apparent to you. Testimonial may be in a written or video format and includes:

- Demonstrating their ability to communicate and represent key ideas
- Providing an evaluation of their prior experience and their development throughout the process of applying for this certification
- Reflecting on the overarching purpose of the evidence they provided in support of their application

To facilitate their testimonial, candidates have been provided with the following prompts:

What?	So What?	Now What?
<ol style="list-style-type: none"> 1. What was the context of the evidence? 2. What was their role in this evidence? 3. When was it developed? 4. Did they complete it independently or as part of a team? 5. What was the budget? 6. What were some of the challenges or barriers they faced? 	<ol style="list-style-type: none"> 1. What skills did they develop? How are these related to the certification criteria? 2. What was the result? 3. Was there an impact on their business or community? 4. What worked well? What didn't? 5. What were their feelings about developing that skill? 6. How do they feel about using that skill now? Are there any differences in their outlook since developing the skill? 7. How do they think others feel? 	<ol style="list-style-type: none"> 1. What are the implications for them and others? 2. What would they do differently next time? 3. Why is this learning important to them? 4. How did they use this learning to advance their skill development? 5. Would there be anything they'd do differently today?

ePORTFOLIO ASSESSMENT

Two Questions

Though their ePortfolio incorporates a biography, self-declaration, and testimonial, as a reviewer, you are tasked with answering two questions:

1. *Did the candidate provide valid evidence that they possess the skills as defined in the certification criteria?*
2. *If so, at what level of skill does the evidence support?*

The biography, self-declaration, and testimonial should provide sufficient information to answer both questions objectively.



Using the ePortfolio Assessment Matrix

Each certification includes a certification criteria matrix. This is the template you'll use to complete your assessment. The templates for each certification are in the appendix. A fillable MS Word template is available at trustedskills.org.

This assessment matrix includes three columns:

1. Evidence Provided

This is a brief note of the specific form of evidence provided by a candidate to support the skill criteria.

2. Recommended Level Assessment

Based on your assessment of the evidence provided, you will assign one of four standards to a skill:

- Level 0: No evidence of basic skill level
- Level 1: Evidence of basic skill
- Level 2: Evidence of advanced skill
- Level 3: Evidence of expert skill

3. Reviewer Comments

In this column you will provide additional notes associated with your assessment. Please note, this assessment matrix will be shared directly with the candidate, so ensure the comments are respectful.

Providing Additional Observations

Below the matrix, you will have an opportunity to highlight secondary themes or issues. However, your additional observations should remain focused on the certification criteria. An exception may be identifying significant issues in a candidate's writing quality. This is outside the certification criteria but impacts their perceived professionalism.

Completing the Confidential Summary

In the final section of the template, you will have an opportunity to provide a confidential summary of your assessment for the Oversight Prime and Board. This section is confidential and will not be shared with the candidate. In the summary, include any additional themes to support your recommendation that you did not note on the assessment matrix. You may use paragraphs or bullets but always link back to evidence where possible. Please avoid the use of jargon and acronyms.

ADVANCED SKILLS CASE STUDY

What is Level 2 Advanced Skills Case Study?

The level 2 *Advanced Skills Case Study* is a two-hour "real-time" challenge for those pursuing a level 2 advanced certification. The case study will define a concise problem related to the specific certification a candidate is challenging. Case studies are used as tools in business, medicine, law, and other fields. The goal is to examine how the candidate responds to a real-world challenge by asking them a simple question: *What would you do in this situation and why?*

This case study aims to verify that the level 2 advanced candidate can apply the skills in the certification criteria in real-time. Like most problems, a case study does not have a "correct answer." Rather, the goal is to assess how they applied their skills to identify the problem, analyze options, and recommend a solution in the defined scope.



The Case Study Format

The case study will be released to the candidate, and they will have two hours to complete and submit it to you via the reviewer DropBox portal. A case study will be between 10 and 15 pages (including appendices). The case study will focus on three areas:

Explaining the Problem

A marketer is grappling with some question or problem that needs to be solved.

Defining the Context

It describes the context and scenario associated with the problem.

Providing the Evidence

The case allows a candidate to make an evidence-based recommendation. This evidence will depend on the certification they are challenging. Evidence may range from supporting data to creative examples and everything in between. The evidence will be contextual and linked to the certification.

The case studies all follow a consistent format, though the topic and context will vary by certification.

CASE STUDY ASSESSMENT

Maximum assessment out of 20

Problem Identification (6)

1. What is the major problem?
2. What are the additional problems that must be considered?
3. What is the evidence that supports this conclusion?

Recommendation (6)

1. What is the recommendation?
2. Is the recommendation linked to the analysis and evidence?
3. Is the recommendation something that can be done reasonably?
4. Does the recommendation resolve the problems and achieve the desired result?
5. Does the recommendation make efficient use of available resources?

Applies Certification Criteria (8)

Does the candidate's analysis and recommendation demonstrate the application of the certification criteria identified in the case study?



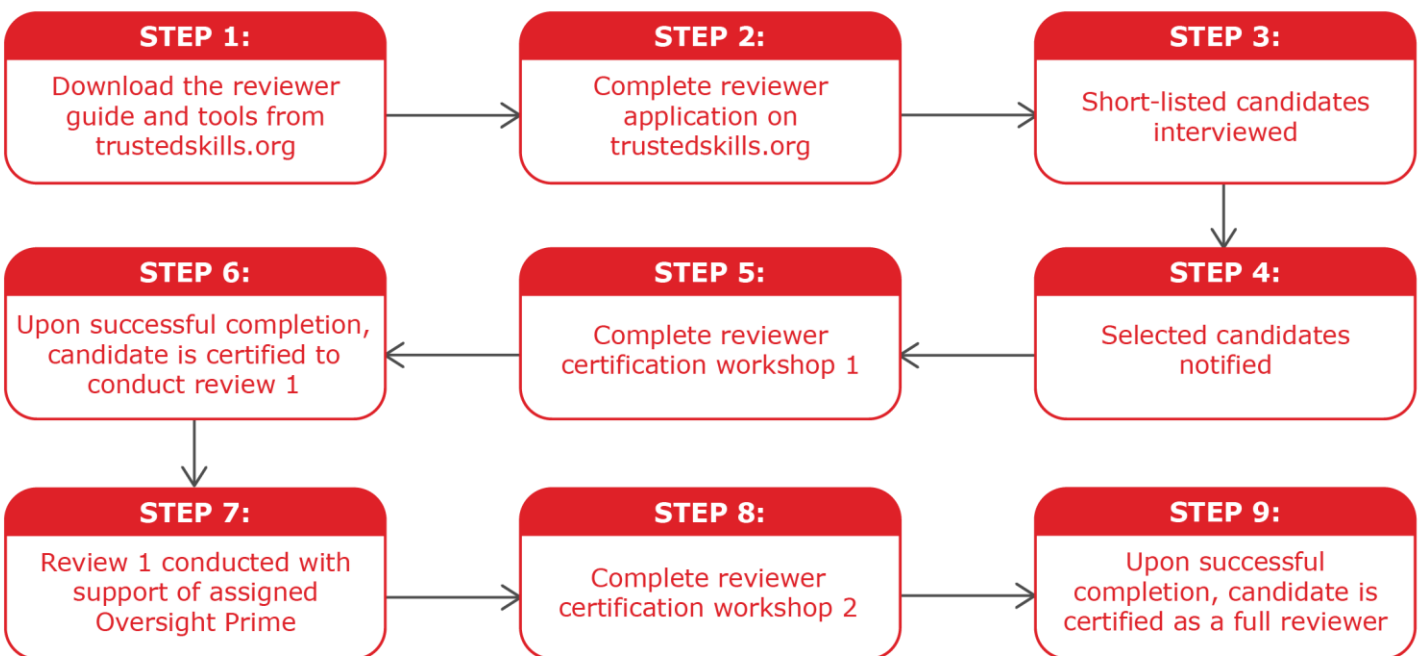
SECTION 5

BECOME A CERTIFIED REVIEWER

HOW TO APPLY

Trusted Skills is built on trust and legitimacy. This trust and legitimacy are anchored in the trust and legitimacy of the *Trusted Skills* reviewer. Therefore, the *Trusted Skills* program incorporates a rigorous nine-step process for the selection, training, and certification of our reviewers. This includes reviewers successfully completing two certification workshops. Upon successful completion of the second workshop, reviewers will become certified reviewers. This certification must be renewed every 24 months.

The *Trusted Skills* reviewer training and certification follows the nine-steps below.





STEP 1	Download Guide and Tools Download the reviewer guide and reviewer tools on the trustedskills.org . The guide and tools will provide extensive detail on the processes and skills required to conduct reviews for each of the four <i>Trusted Skills professional certifications</i> .
STEP 2	Complete Application Go to trustedskills.org under the "Become a Reviewer" tab and complete the online application form.
STEP 3	Candidate Interviews The <i>Certifying Oversight Board</i> will conduct interviews of all short-listed candidates.
STEP 4	Candidate Selection Success candidates will be notified they have been selected.
STEP 5	Certification Workshop 1 – Introduction to Reviewing All candidates must complete reviewer certification workshop 1. This workshop will focus on the fundamental process of conducted an evidence-based review.
STEP 6	Candidate Provided Preliminary Certification Upon successful completion of certification workshop 1, a candidate is certified to conduct review 1.
STEP 7	Review 1 Completed All reviewers will conduct their first review with the support of an assigned oversight prime. The oversight prime will act as a mentor and be available to support the reviewer throughout this process.
STEP 8	Certification Workshop 2 – Reviewer Calibration All candidates will complete reviewer certification workshop 2. Consistency is critical; therefore, this second workshop focuses the calibration of evidence and processes from across the review team.
STEP 9	Certified as Full <i>Trusted Skills</i> Reviewer Upon successful completion of workshop 2, candidates are certified as a full reviewer.



APPENDICES



FREQUENTLY ASKED QUESTIONS

Do I need teaching experience if I want to become a qualified reviewer?

No. There's no teaching involved. Those assessing the skills of candidates will be certified professionals in the field that is being certified. This is what we call it *professional certifying professionals*.

How do I apply to become a certified reviewer?

If you're interested in becoming a certified reviewer, the first step is to assess the certification criteria for the four *Trusted Skills professional certifications* being piloted in 2022. If you believe you're qualified, please contact us at support@trustedskills.org. We will follow-up with additional details.

What is the process for reviewing the different skills?

Each skill is anchored to rigorous certification criteria developed by professionals in each area. In addition, the assessment is based on multiple forms of evidence. For all levels, the submission of an ePortfolio is required. For level 2 certification, an advanced skills case study is required. Last, a skill is confirmed by a *Trusted Skills* reviewer with expertise in a specific area.

How are *Trusted Skills* reviewers certified?

A core principle is that *Trusted Skills professional certification* is only as legitimate as the process and people who verify them. For this reason, an important goal of this prototype phase is evaluating a variety of mechanisms to ensure rigour. Each *Trusted Skills* reviewer will undergo a rigorous evidence-based orientation and assessment to prove they have the currency and ability to assess specific skills.

What organization is awarding *Trusted Skills professional certification*?

The project is a joint initiative of Calgary Arts Development Authority and Calgary Economic Development. During the prototype, we will evaluate the optimal structure and resources needed for a potential scaling of *Trusted Skills professional certification*.

What is the value of *Trusted Skills professional certification* to an employer?

Trusted Skills professional certification aims to mitigate risk for employers during the hiring process. Consistent and trusted mechanisms certifying a candidate's skills remove some of this risk. Employers often request specific educational credentials (e.g., degree) or professional certifications (e.g., a Chartered Professional Accountant designation). These certifications confirm in advance that a candidate has certain skills from an objective and trusted third party.

However, few recognized certifications exist for many areas, including non-technical fields. For instance, a university degree in marketing does not necessarily certify that a candidate can plan, launch, and manage a digital media campaign. The real value of *Trusted Skills professional certification* is the potential to recognize the infinite ways high-valued skills can develop, whether through volunteering, attending a workshop, or having a mentor.



What employers will benefit most from *Trusted Skills professional certification*?

Trusted Skills professional certification helps all employers; however, we expect it to have the greatest impact on Calgary-based small-medium enterprises. Since small-medium employers often recruit from the local labour market, they could explicitly seek candidates with a specific certification. In contrast, large national or multinational corporations recruit from a global labour market. Therefore, we expect it will be rare that large-scale employers will specifically embed *Trusted Skills professional certification* into their recruitment process.

What is the value of skill *Trusted Skills professional certification* to a job seeker?

The job market is highly competitive, and most employers receive hundreds or thousands of applications for each job. The job seeker aims to make this decision easier for employers and remove the risk. Having *Trusted Skills professional certification* helps manage this risk by certifying in advance that the job seeker has the skills the employer seeks.

Why is it only Calgary?

Skill demand is dynamic and ever-changing, making speed and agility essential. By narrowing the scope to metropolitan Calgary, we also narrow the number of stakeholders involved, increasing efficiency while ensuring economies of scale. Keeping the scope at a city-level focuses the program's benefits on Calgary-based small-medium enterprises, which represent 99% of all employers in the city. Research shows that small-medium employers depend heavily on recruiting from their local geographic labour market, primarily because of the high cost of moving a new employee. In contrast, large organizations have the ability and resources to recruit from a larger labour market.

How are *Trusted Skills professional certifications* assessed?

The assigned *Trusted Skills* reviewer will use the certification criteria to assign a candidate one of four potential levels:

- Level 0: No evidence of basic skill level
- Level 1: Evidence of basic skill
- Level 2: Evidence of advanced skill
- Level 3: Evidence of expert skill

How much does it cost for *Trusted Skills professional certification*?

The current economic model expects a fee to be paid by the candidate for every certification. This fee is solely for cost recovery.

For the prototype, Calgary Arts Development Authority will fully fund the certification fee. The goal of this model is to balance rigour and accessibility. If the rigour of the *Trusted Skills professional certification* process is compromised, the *Trusted Skills professional certification* will have no value to employers. However, if the process is so costly that Calgarians pursuing *Trusted Skills professional certification* face a financial barrier, it also defeats the goal of greater inclusivity in the labour market.

Can a candidate submit work that was completed as part of a team?

When a candidate submits evidence, they will note the team members who contributed to the project. If they did the work solo, they could leave this section blank. But if they worked as a team, they must share the names or handles of co-contributors. Failure to do so results in a disqualification.

How can *Trusted Skills professional certification* facilitate greater inclusivity?

In skill areas where there are no rigorous forms of skill certification, employers de-risk hiring through informal methods (e.g., checking references). These methods are shown to systematically disadvantage candidates in marginalized communities. *Trusted Skills professional certification* is designed to objectively assess the level of an individual's skills and reduce the current dependency on informal methods.



Does decoupling dilute the value of certified skill development?

Trusted Skills professional certification is designed to complement all forms of skill development, including certified skill development. Decoupling recognizes that there are infinite routes to developing a skill. Most skills involve the intersection of certified, non-certified, and informal skill development experiences. Decoupling unlocks and recognizes the importance of this intersection in modern skill development. An example is how studying liberal arts could help develop high-demand skills, such as problem-solving and communications. Similarly, sports and recreation can play a significant role in developing skills associated with leadership and collaboration. *Trusted Skills professional certification* offers a path for individuals who possess these skills to have them rigorously assessed and certified regardless of their background.

How are different skill levels recognized?

Each certification has three defined levels: basic, advanced, and expert. Each level includes detailed certification criteria that define the evidence needed to prove the associated level of skill. To receive a "basic" certification in an area, a candidate must demonstrate a minimum "basic" level in each of the skills.

How can professional or community volunteer work experience be recognized?

The specific evidence will vary by certification. However, all *Trusted Skills professional certifications* require a candidate to supply evidence that they can do what they say they can do. Often this evidence is in the form of earlier work completed. Whether this evidence was the output of paid employment or volunteer experience is irrelevant to the assessment process, which singularly considers the output.

Why is the prototype linked to marketing?

This project is being funded by Calgary Arts Development Authority (CADA), with the support of Calgary Economic Development and the Calgary Marketing Association. CADA is leading the development of Calgary's **creative economy strategy**. A pillar of this strategy is the critical need to accelerate the development of Calgary's creative skills. We are evaluating whether decoupling can unlock and recognize the existing capacity in the system by providing creative skill developers with a certification path.

What happens after the prototype phase?

Following the prototype phase, the project team will review its success compared to the defined questions. Concurrent to the prototype, we will review paths to potential expansion and scaling of *Trusted Skills professional certification* to other professional fields. Based on this, the project team will evaluate the next steps.



PROJECT GLOSSARY

Certification Application Process

The *Trusted Skills professional certification* application process complies with ISO 17024 standards by incorporating the following mandatory elements:¹

- Information required to identify the applicant.
- The scope of the desired certification.
- A statement that the applicant agrees to comply with the certification requirements and supply any information needed for the assessment.
- Opportunity for the candidate to declare, within reason, a request for accommodation of special needs.

Certification Assessment Process

- The assessment is planned and structured to ensure the defined requirements are objectively and systematically verified with evidence to confirm the candidate's skill.
- The certification criteria for assessment of evidence shall be established, documented, and monitored.
- The definition of evidence must ensure the comparability of each candidate's results, both in content and difficulty, including the validity of a *Trusted Skills professional certification* decision. This will ensure that each assessment is fair and valid.
- The assessment process will verify and accommodate special needs within reason and where the integrity of the assessment is not violated.
- Procedures must ensure a consistent administration.

Certifying Body

During the prototype phase, the certifying body is Calgary Arts Development Authority.² The certifying body is operationalized through the certification Oversight Board (Board), accountable for defining and maintaining oversight of all *Trusted Skills professional certifications*, including approving certification criteria, the skill certification processes, and appointing *Trusted Skills* reviewers. In compliance with ISO 17024 standards, the Board incorporates the following mandatory elements:³

- Is responsible for all decisions relating to certification, including the granting, maintaining,

expanding, and reducing the scope of the certification.

- Will make public the scope of the certification criteria and a general description of the certification process.
- Will maintain comprehensive certification records. These records will be identified, managed, and disposed of to maintain confidentiality.
- Incorporates policies and procedures necessary to ensure security throughout the entire certification process.
- Will verify and provide information, upon request, on whether an individual holds a current, valid certification and the scope of that certification.
- Incorporates processes and policies to prevent fraudulent examination practices.
- Will monitor the performance of the reviewers and the reliability of the reviewers' judgements.
- If certification is fully deployed, it will ensure that the certification criteria are assessed and validated on an ongoing, systematic basis.

Certification Candidate

The applicant who is pursuing *Trusted Skills professional certification*.

Certification Criteria

certification criteria define the certification criteria and evidence by which the Oversight Board (Board) determines that a person fulfills certification requirements (also referred to as "standards"), including application, assessment, decision on certification, recertification and use of certificates and logos/marks as applicable. Certification criteria comply with ISO 17024 standards by incorporating the following mandatory elements:⁴

- A definition and scope of each certification and recertification.
- A definition of the required skills to be awarded certification.
- A definition of the assessment methods required for the initial certification and recertification
- A definition of the required evidence of this skill.
- A definition of the certification criteria for suspending and withdrawing certification.



- A definition of the certification criteria for changing the scope or level of certification.
- Be managed by appropriate experts.
- Embed appropriate processes and structures.

Certification Decision

The information used to award a *Trusted Skills professional certification* complies with ISO 17024 standards by incorporating the following mandatory elements:⁵

- certification decisions are the sole discretion of the Board.
- All information used is traceable.
- The Board will award certification based on only the certification criteria.
- Those on the Board are not in conflict of interest with the candidate.
- Those appointed to the Board possess the expertise to decide on awarding certification.
- certification will not be granted until all certification requirements are fulfilled.
- If certification is fully deployed, the Board must provide a documented process to receive, evaluate and make decisions on appeals, including the following:
 - A public process for appealing, including providing timely updates on the status of an appeal.
 - A process for tracking and recording an appeal.
 - A process to ensure corrective action will be taken if applicable.
 - Policies to ensure appeals are timely and impartial.
 - Process to guarantee that the submission, investigation, and decision on appeals shall not result in discriminatory actions against the appellant.

Certification Fee

The certification fee is the cost associated with reviewing each. This fee is a direct cost recovery to compensate the *Trusted Skills* reviewers. The certification fee for the prototype is \$500, which CADA will fully sponsor.

Certification Oversight Board (Board)

Trusted Skills professional certification is operationalized through the certification Oversight Board (Board), accountable for defining and maintaining oversight of all *Trusted Skills professional certifications*, including approving certification criteria, the skill certification processes, and appointing *Trusted Skills* reviewers.

Certification Reviewer

Certified expert assigned to assess the evidence submitted by a candidate. The selection and approval processes shall ensure that reviewers:

- Are certified by the Board as having expertise in the specific skill being assessed.
- Understand and can apply the certification process.
- Have identified any known conflicts of interest to ensure impartial judgements are made.
- Will remain anonymous to a candidate.⁶

Digital Certificate

The Board will provide a certificate to all persons who have been awarded *Trusted Skills professional certification*. The Board maintains the sole ownership of the certificates. The format of the certificate during the prototype will be defined by the Board and be authorized by a responsible member of the Board, and contain the following:

- Certified person's name.
- Certifying body's name.
- Refer to the certification criteria where relevant.
- The scope of the certification.
- Awarding date of the certification.
- Elements to minimize the risk of counterfeiting.

Decoupling

In a skill development context, decoupling involves disconnecting the process of developing a skill and certifying a skill. Higher education often integrates these paths. For example, an individual takes a class and is assessed upon completion as meeting a defined learning outcome. Decoupling puts the primacy of skill certification by recognizing that infinite ways to develop a skill exist. The decoupling principle is widely used today in various professional fields, including skilled trades and motor vehicle licensing.

Educational Certification⁷

This category includes persons who have obtained a secondary or high school diploma or high school equivalency certificate. The section also includes university certificates or diplomas below the bachelor's level. University certificates or diplomas commonly link with professional associations in accounting, banking, insurance, or public administration. The certificates and diplomas in this category do not require a bachelor's degree as a prerequisite.

Enabling Skills

Enabling skills (also called transferable, human, or soft skills) incorporate aptitude, ability, knowledge, and skills associated with problem-solving, self-reliance, collaboration, communications, core literacies, and core workplace skills.



Examination

This mechanism is part of the assessment measuring a candidate's skill by one or more means, such as written, oral, practical, and observational, as defined in the certification criteria.⁸ During the prototype phase, each candidate will be required to complete an examination in the form of a case study for each certification they pursue.

Experience

The hours put into a specific skill development experience. To be recognized in most certification programs, such as co-operative education or the Red Seal, hours need to be tracked and documented.

Evidence

Tangible evidence of a defined skill.

Fairness

Equal opportunity for success provided to each candidate in the *Trusted Skills professional certification* process.⁹

Four-Level Standard

The evidence associated with each certification will be assigned one of four standards:

- Level 0: No evidence of basic skill level
- Level 1: Evidence of basic skill
- Level 2: Evidence of advanced skill
- Level 3: Evidence of expert skill

Functional Skills

Functional skills are linked to skills needed to complete a specific role, such as an accountant, a project manager, a chef, a nurse, or a software developer. Functional skills embed the ability to adapt and apply this skill across different sectors. Functional skills can develop through a variety of certified, non-certified, and informal skill development. However, the foundation for many functional skills is developed through forms of certified skill development. For example, university and college programming often center around a functional skill (e.g., Bachelor of Nursing; Culinary Arts Diploma).

Impartiality

Presence of objectivity. Objectivity means that conflicts of interest do not exist or are resolved to not adversely influence subsequent activities of the certifying body.¹⁰

Job-Specific Skills

Job-specific skills incorporate aptitude, ability, knowledge, and skills needed to complete a functional task (e.g., accounting, welding) or apply a skill to a unique sectoral context (e.g., oil and gas, logistics).

License¹¹

A license is a permit from a recognized authority to perform a defined task (e.g., medical).

Management of Impartiality

The management of impartiality complies with ISO 17024 standards by incorporating the following mandatory elements:¹²

- The Board shall document its structure, policies, and procedures to manage impartiality and ensure that the certification activities are undertaken impartially. The Board shall have management commitment to impartiality in *Trusted Skills professional certification* activities. The Board shall have a statement publicly accessible without request that it understands the importance of impartiality in carrying out its certification activities, manages conflict of interest and ensures the objectivity of its certification activities.
- The Board shall act impartially concerning its applicants, candidates, and certified persons.
- certification policies and procedures shall be fair among all applicants, candidates, and certified persons.
- certification shall not be restricted on the grounds of undue financial or other limiting conditions, such as membership in an association or group. The Board shall not use procedures to unfairly impede or inhibit access by applicants and candidates.
- The Board shall be responsible for the impartiality of its certification activities and shall not allow commercial, financial, or other pressures to compromise impartiality.
- The Board shall identify threats to its impartiality on an ongoing basis. This shall include threats that arise from its activities, its related bodies, its relationships, or the relationships of its personnel. However, such relationships do not necessarily present a body with a threat to impartiality.
- The Board shall analyze, document, and eliminate or minimize the potential conflict of interests arising from its certification activities. The Board shall document and be able to demonstrate how it eliminates, minimizes, or manages such threats. All potential sources of conflict of interest identified, whether they arise from within the certifying body, such as assigning responsibilities to personnel or from the activities of other persons, bodies, or organizations, shall be covered.

Professional Field

A professional field is a group of people or organizations with a common professional interest, such as an industry (e.g., film) or occupation (e.g., digital marketers). The establishment of a new certification can be initiated by any professional field that identifies demand for skill certification. If approved, a designated professional field is accountable for establishing an oversight committee responsible for developing and managing all aspects associated with their certification. The professional field for the prototype is marketing.



Professional Field Oversight Board

In a scenario of full deployment, each certification will be the responsibility of a designated Professional Field Oversight Board. This Board will be accountable to the Certification Oversight Board.

Project Governance Committee

The *Trusted Skills* Project Governance Committee is mandated to provide counsel for developing and deploying the *Trusted Skills professional certification* prototype between April and December 2022. The project governance committee comprises representative stakeholders, including employers, skill developers, professionals, and functional experts.

Reliability

The indicator of the extent to which examination scores are consistent across different examination times and locations, different examination forms and different reviewers.¹³

Review Process

A process led by a *Trusted Skills* reviewer that evaluates a candidate's fulfilment of the certification criteria.¹⁴

Sectoral Expertise

Sectoral expertise is the unique contextual knowledge or skills needed to complete a specific role within a defined sector. For example, a sector may have unique regulatory, legal, or historical contexts that influence a functional role. For example, an accountant in oil and gas may require specialized knowledge compared to an accountant in the financial services sector. The challenge with sector expertise is the highly contextual nature of sub-sectors within a sector. For example, the oil and gas sector comprise dozens of specialized sub-sectors, including upstream, midstream, and downstream. Within each of these sub-sectors, an additional specialization is tied to exploration, drilling, transportation, refining, and distribution.

Unlike functional skills, sector expertise is primarily developed and refined through direct experience in a sector. The immersion in a sector contextualizes functional skills to this sector. For instance, an individual with strong functional marketing skills must adapt these skills to shift from consumer-packaged goods to tourism.

Self-Assessment

This is the process of a candidate assessing their skills compared to the certification criteria. Based on the self-assessment, a candidate can establish a skill development plan to meet the criteria for *Trusted Skills professional certification*. This plan may incorporate various skill development experiences, including certified, non-certified, or informal skill development. The *Trusted Skills professional certification* website supplies guidance on development pathways and resources available by the diverse skills ecosystem.

Skills

The combination of aptitude, ability, and knowledge to complete a task. In this project, we cluster skills into two categories: enabling skills and job-specific skills.

Skill Evidence

This is the evidence a candidate is asked to submit to prove their skill. The evidence is contextual to each certification.

Skill Testimonial

Reflective practice requires a candidate to think about how their evidence, experience, and perspective contribute to their skill. The reflective practice component of *Trusted Skills professional certification* is a chance for a candidate to provide context and insight into how they have developed their skills. Skill testimonial may be submitted in either written or video format.

Skill Certification

Skill certification is the practice applied to decide if a candidate has evidence of the aptitude, ability, knowledge, and skills needed to complete a defined task.

Trusted Skills professional certification

Trusted Skills professional certification aligns with the economic development priorities of Calgary as defined in Calgary in the New Economy. This model is intentionally decoupled from a specific skill development process and is granted by an independent community body. The legitimacy is rooted in the rigour of the *Trusted Skills professional certification* and the potential for ubiquity across a community's skills ecosystem.

Validity

Evidence that the assessment measures what it is intended to measure, as defined by the certification criteria.



REFERENCES

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- ¹ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
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- ³ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
- ⁴ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
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- ⁶ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
- ⁷ *Statistics Canada*, Classification of educational qualifications responses (2016). Retrieved from <https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getV D&TVD=305403&CVD=305404&CPV=2&CST=07042016&CL V=1&MLV=6&D=1>.
- ⁸ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
- ⁹ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
- ¹⁰ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
- ¹¹ Lexico.com. (n.d.). licence. Lexico. Retrieved from <https://www.lexico.com/definition/licence>.
- ¹² Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
- ¹³ Refer to ISO/ IEC Standard 17024 available from: <https://www.iso.org/standard/52993.html>
- ¹⁴ Refer to eCampus Ontario experiments as an example.