International Competency Assessment Board

Implementation Guide
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Introduction

Objective
The purpose of this Implementation Kit is to provide guidance on the I-CAB Functional Competency Assessment and Development Process and how it can be used as part of an organization’s continual improvement strategy, and/or contractor management processes.

This document will help an organization use the tools administered by the I-CAB Foundation to:

- Identify individual and/or group competency gaps within the organization that may be inherent, or due to regulatory change.
- Increase competency development and create an organizational culture that fosters continual improvement.
- Reduce high-risk event potential where mitigation efforts rely on personnel competency.
- Assess, develop and maintain workforce competency as a method to achieve regulatory compliance and demonstrate organizational due diligence.

Participation
The scope of implementation activities to which this document applies includes*:

- Operational and operational support personnel in supervisory level, or above, positions.
- Personnel who plan, manage, supervise and/or advise on activities and/or functions that require risk management.
- Contractor and sub-contractor personnel in supervisory level, or above, positions (where applicable).

*Assessments taken at no cost through the Foundation Trust Fund for General Workforce (non-leadership) are not specifically addressed in this Implementation Guide but can be used within the systems addressed herein.
About I-CAB

Overview
The International Competency Assessment Board (I-CAB Foundation) is a non-profit organization dedicated to continuous improvement of competency in the global workforce. The I-CAB Foundation is structured to provide assessments and development resources to individuals and organizations in Canada, the United States of America, Great Britain and Australia.

The I-CAB Foundation provides competency assessments and development planning to individuals and organizations that support regulatory due diligence requirements. Assessments are administered to measure existing levels of functional competency and facilitate ongoing development.

In addition, the I-CAB Foundation strives to benefit employment-vulnerable groups through the I-CAB Foundation Trust Fund, which provides competency assessments and development planning at no cost.

Employment-vulnerable groups benefiting from the trust include students, young workers, workers being retrained and the underemployed.

Assessment Process
The I-CAB Foundation’s Competency Assessment process is a series of simple steps designed to assess participants on the functional and regulatory competencies related to their work roles. I-CAB assessments measure specific cognitive abilities of registered individuals and provide assessment results reports, as well as post assessment development planning tools.

A third party online proctoring service called Integrity Advocate is used to validate the identity of each participant through electronic recordings of the individual, along with verification of their government issued photo identification. The participant is recorded for the duration of the assessment, where facial recognition software and human review is used to ensure the integrity of the assessment process based on rules for assessment completion (e.g., completing without the assistance of another person). By utilizing this third party application the I-CAB Foundation need never collect or have access to the government issued identification provided by participants to verify identities and Integrity Advocate never has access to participant details provided such as phone number, address, email etc.

Assessment Results
Assessment results are protected though a series of privacy gates controlled first by the individual, then by the participating organization and finally by the organizations that results are shared with. A secure online software interface is used to grant and control access by the individual user to their employers, and by their employers to outside organizations. An individual user can allow their employer access to their results, with the understanding that their employers will use the data for internal company business and for client validation of compliance capabilities.

The assessment results are continually updated based on changing factors, such as amended regulatory requirements, time, recent judgments and new interpretations. Assessment results also incorporate data such as industry experience, educational background and competency specific self-assessments to provide a reliable metric for the assessment of both cumulative and individual competency, specific to a job-function and/or project.
Individual competency assessment results are integrated into a number of reports utilized by leadership to assess and manage collective competency. These reports are able to provide leaders with the ability to understand the strengths and weaknesses in the competency of work groups of varying sizes, right up to the organizational level itself. Assessment reports are created to display data in a matter that facilitates the accurate interpretation of the competency related metrics. Interpretation of data is facilitated through a variety of benchmarks, data visualizations and quantifications.

**Competency Capability Report Types**

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report Name</th>
<th>Content</th>
<th>Accessible by</th>
</tr>
</thead>
</table>
| Individual  | Individual Competency Assessment  | This report provides a graphical overview of an individual’s experience and assessment results compared with self-perceptions, the industry mean and target score. | • Individual participant  
• Data Viewers*  
• Corporate Users* |
|             | Organizational Analysis           | This report provides an analysis (non-graphical) of an organization, work group or team’s assessment results specific to high-risk areas that correlate with a scope of work. | • Analysis Viewers  
• Data Viewers  
• Corporate Users* |
| Analysis    | Post-Incident Analysis            | This report provides an analysis (non-graphical) of the manager, supervisor and advisory/specialist’s assessment results specific to competencies that have been determined (post incident) as having a preventative benefit. | • Analysis Viewers  
• Data Viewers  
• Corporate Users* |
|             | Controlling Entity Analysis       | This report provides an analysis (non-graphical) of an organization’s ability to manage workforce competency and take on the role of Controlling Entity for a specific scope of work. | • Analysis Viewers  
• Data Viewers  
• Corporate Users* |
| Data (Graphical) | Competency Management       | This report provides a graphical overview of an organization’s assessment activity, assessment results, corporate targets as well as implementation data. | • Data Viewers  
• Corporate Users* |
Cumulative

This report provides a graphical overview of a work group or team’s cumulative experience and assessment results compared with project targets, the industry mean and target score.

- Data Viewers
- Corporate Users*

Participant Development

This report provides an overview of which stage in the assessment process personnel are. Personnel participation data from organizations that share their data at a Level 1 are also available in this area.

- Analysis Viewers
- Data Viewers
- Corporate Users*

Contractor Management

This report provides an overview of the overall implementation activities of all contractors who share data with the organization.

- Data Viewers
- Corporate Users*

* ability to view is dependant on individuals having shared their results with their employer

Data Access

In order to maintain the security of personal information and to ensure that results are not misinterpreted or misunderstood if viewed by those without the appropriate background and/or understanding, the I-CAB Foundation has the following division of access to results and data:

<table>
<thead>
<tr>
<th>Role</th>
<th>Suggested for:</th>
<th>Data/Report/Functionality Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant</td>
<td>Individuals completing assessments</td>
<td>Access to Individual Report containing their own data only.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ability to personal data with select organizations (typically their employer) and can retract the same sharing access when desired.</td>
</tr>
<tr>
<td>Analysis Viewer</td>
<td>Directors, Managers, Assistant Managers and Advisors</td>
<td>Access to Analysis Reports at the Organization Level for:</td>
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<tr>
<td></td>
<td></td>
<td>- Employees who have voluntarily participated, and</td>
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<tr>
<td></td>
<td></td>
<td>- Contractor organization level data that has been shared with the organization.</td>
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<tr>
<td></td>
<td></td>
<td>Access to summary data specific to:</td>
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<tr>
<td></td>
<td></td>
<td>- Their organization and contractor users (restricted to assessment start / completion dates, development plan initiation / expiration dates and percentage improvement).</td>
</tr>
<tr>
<td>Data Viewer</td>
<td>Central I-CAB process administration team</td>
<td></td>
</tr>
<tr>
<td>-------------</td>
<td>------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Contractor implementation / competency management data that is restricted to whether the contractor has user registration activity, assessment initiation activity, pre-selected competencies, established competency targets, has participating subcontractors and the level of participation (assessments, developmental planning) and percentage annual improvement (contractor data viewable is dependent on contractors sharing the assessment data).</strong></td>
<td>No access to individual level data.</td>
<td></td>
</tr>
<tr>
<td><strong>Data Viewer</strong></td>
<td>Central I-CAB process administration team</td>
<td></td>
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<tr>
<td><strong>Same as Analysis Level above, plus:</strong></td>
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<tr>
<td>Access to Cumulative Reports at the Organization Level for:</td>
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<td></td>
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<tr>
<td>• Participating personnel, and</td>
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<tr>
<td>• Contractor organization level data that has been shared with the organization.</td>
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<tr>
<td>Access to Individual Reports where individuals working for the organization and contractor organizations have shared that level of data.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additionally, this user level can:</td>
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<td></td>
</tr>
<tr>
<td>• Create and edit reports,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Share reports with other organizations,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define acceptable email suffixes for assessment access purposes,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Edit participant’s job function</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Register participants individually or in groups, and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Remove a user’s account from being associated with the organization (i.e. when individuals leave the employment of the organization).</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Corporate User</strong></td>
<td>Senior Management responsible for contractor management and/or employee development</td>
<td></td>
</tr>
<tr>
<td><strong>Same as Data Viewing Level above, plus:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to functions including:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Access to assessment purchase functions and receipts,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Limit types of assessments accessible,</td>
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</table>
New users are added to corporate accounts when they register by choosing to associate themselves with an organization. At this time, users are also required to acknowledge that they are giving that organization permission to access and share their data.

A user can be removed from a corporate account at any time either by personally removing themselves from the account by removing the association to the organization in their personal information, or by being removed by the organization’s Corporate User. Once a user has been removed, all access to their data is also removed.
Getting Started

System Requirements
In order to ensure the integrity of assessment results, and the highest security of personal data, the I-CAB Foundation requires users to access the website using the following compatible web browsers:

- Google Chrome
- Mozilla Firefox
- Internet Explorer 11* or higher
- Microsoft Edge
- Apple Safari

Web browsers must have JavaScript enabled, with permission to access the computer’s web camera and microphone in order to interact effectively with the website.

Networks being used to access the I-CAB website need to also allow access to Vimeo video streaming services in order for personnel to access help and preparation videos on the site.

On mobile devices, such as a tablets or smartphones, only devices using the Android operating system currently meet the security and functionality requirements of the I-CAB website (mobile devices are not recommended for assessment completion or report access).

Project Approach
In order to implement the I-CAB Functional Competency Assessment and Development Process as part of organizational risk mitigation initiatives, the I-CAB Foundation recommends approaching a full corporate implementation in the following steps:

- **Engage Champions**
  - Identify personnel in key leadership positions who will be able to champion the implementation and decide on the desired level of competency metric utilization/integration and roll out schedule.

- **Engage Stakeholders**
  - Inform stakeholders (participating internal/contractor personnel) about the implementation timeline, assessment process and purpose.

- **Governing Documents**
  - Adjust internal documentation (procedure, etc.) that will create the organizational framework as to how I-CAB competency metrics will be used.

- **Training**
  - Identify and provide select personnel with instruction on metric utilization, software capabilities and assessment and development process details.
Implementation Timeline

The below is a recommended implementation timeline. Included are approximate times needed for completion of each phase.

- **2 months before Implementation:**
  Establish Champions and notify Executives of I-CAB Implementation Process

- **1.5 months before Implementation:**
  Meet with Stakeholders to discuss the impact of Implementation
  Notify Contractors of preference at time of bid/RFP

- **1 month before Implementation:**
  Revise internal processes to integrate I-CAB metrics

- **15 days before Implementation:**
  Communication Kit sent out to senior management detailing requirements of personnel

- **7 days before Implementation:**
  Communication out to all personnel

### Implementation

- **7 days after Implementation:**
  All personnel have created an I-CAB account and have begun to take assessments
  Contractor meetings begin

- **14 days after Implementation:**
  All personnel have completed an assessment
  Data and Advisory roles have been assigned in the system
  Development Plan meetings have begun
  Reports have been shared with external organizations (where applicable)

- **1 month after Implementation:**
  All personnel have created a development plan (where necessary)
  Contracts have been amended to reflect integration of I-CAB metrics

- **2 months after Implementation:**
  Review of internal processes and the method in which I-CAB metrics are being integrated
  Contractor Implementation begins

- **3 months after Implementation:**
  All Contractors are sharing reports

- **7 months after Implementation:**
  All personnel have completed a reassessment (where necessary)

- **8 months after Implementation:**
  Competency Targets are reassessed
The Appendix includes all referenced communications materials, as well as a Gantt Chart demonstrating the suggested timeline.

**Personnel Assessment Process**

The I-CAB Foundation’s Competency Assessment model is divided into seven components. The I-CAB Foundation recommends that this process occur over a six-month period of time in order to maximize personnel development.

1. **Establish Participation Requirement (Day 1)**
   
   Determine who will participate in a competency assessment. This decision is based on the following criteria:
   
   a. The roles and the responsibilities of the participant within the organization (e.g., what they do?)
   b. The regulatory expectations of the participant’s role (e.g., what does the law say they must do?)
   c. The career development of the individual and/or succession planning of the organization (e.g., what does the organization desire the person to do?)
   d. Client expectations (e.g. what does the client ask regarding participation?)

2. **Provide Data to Commence Process (Day 2)**

   **Total time needed to complete: <1 hour**

   Once identified, participating individuals provide relevant data at commencement of the assessment process. Such data includes, but is not limited to: Applicable education, qualifications (including trade certifications) and years of relevant work experience.

   Following this, the individuals complete a self-assessment of their existing level of knowledge in the key areas of competency (self-assessment is integrated into the assessment process).

3. **Complete Proctored Competency Assessment (Day 2-12)**

   **Total time needed to complete: 2 hours or less**

   To safeguard the integrity of the process and the legitimacy of the associated data, a formalized electronic proctoring process is utilized. The proctored assessment then undergoes two independent reviews and, if the integrity of the assessment is in question, a process of adjudication is initiated. If required, an automatic appeal process also takes place.

4. **Review Assessment Results (15-19 days)**

   **Total time needed to complete: 1 hour or less**

   The results of the assessment are published within three to seven days of assessment completion. Organizations can find significant benefit from having the assessment results of an individual reviewed by the individual’s supervisor, as well as the individual. Reviewing together allows them to determine a competency development focus that aligns both with the individual’s job function and the cumulative competency targets of the organization.
5. **Create a Development Plan (as required) (19-25 days)**

*Total time needed to complete: 1 hour or less*

Development plans based on detailed competency proficiencies and informative benchmarks, are integrated into the process and can be enacted after thirty days and before six months of initial assessment date. Upon creation of a development plan, information is provided on where to locate the applicable resources (e.g., training, courses, reference material, in-field assessment coaches) to assist the individual in achieving their development goals. The I-CAB Foundation does not provide any for-fee development products or services, nor does it have any commercial or legal ties to training, publishing or web-based resources that are recommended. The resources provided are identified through targeted research, technical committee discussions and from subject matter expert recommendations.

6. **Commence Development Activities (where applicable) (Day 55-145)**

*Total time needed to complete: dependent on participant and competency goals*

The I-CAB Foundation provides references to training and study materials to assist individuals in further developing skills and knowledge in preparation for a reassessment. The I-CAB Foundation does not support one method of development over another, however it has been found that competency assessment development is accelerated when a learner works with a mentor on relevant competencies, in the relevant subject matter, in addition to accessing the resources provided.

7. **Reassess (as required) (Day 55-145)**

*Total time needed to complete: 2 hours or less*

Reassessments are prompted by pre-set processes to occur within 30 days to six months of the initial competency assessment. The process repeats step 1 to 3 with resulting improvements illustrated in the generated report.

**Working with Contractors**

Contractors play a critical role in the day-to-day operations of most organizations and as such need to manage a significant amount of risk. From a legal perspective, organizations need to do everything reasonable to help manage this risk by exercising appropriate control over contractor activities.

Competency metrics give the ability to oversee development planning of contractors that is risk specific without inappropriate involvement that directs contractor focus. Competency metrics allow an organization to identify and address situations where the cumulative level of competency may require mitigation without making direct decisions over equipment, process or personnel.

Onboarding contractors can be quickly accomplished using the Corporate Account Set Up Guide that has been linked in Appendix A and is available on the I-CAB website, which will walk them through account set-up.

While the cost of I-CAB assessments should be part of a contractor’s obligation to maintain and prove competency, motivating them to take assessments regularly can be accomplished by offering incentives such as crediting their account for assessment results above the industry average, or incorporating I-CAB Functional Competency Assessments as a beneficial factor during bid processes.
Sustainment

Competency Targets

The competency assessments offered by the I-CAB Foundation are created to assess competency in multiple stages. These stages consist of four levels of functional competency.

<table>
<thead>
<tr>
<th>Recognition Level</th>
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<tbody>
<tr>
<td>• At the recognition level a user is able to recognize equipment, machinery, terms and key risks associated with the chosen area.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comprehension Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>• At the comprehension level a user is able to identify controls mandated by regulation in conjunction with operational risks and/or work site conditions associated with the chosen area.</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Interpretation Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>• At the interpretation level a user is able to apply regulatory and industry standards and/or best practices to their work site management decisions within the chosen area.</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Application Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>• At the application level the user is able to fully analyze scenarios based on actual high-risk workplace incidents and determine an appropriate course of action that effectively mitigates those risks.</td>
</tr>
</tbody>
</table>

Competency Targets can be defined by an organization in the Reporting section of the website and will determine the average and peak targets for a personnel group. It is recommended that these be monitored on a quarterly basis and adjusted to align with the expectations of on-going or emerging work within project specific group reports.

Organizational Analysis reports should be reviewed regularly and reporting groups defined where required. Plans should be established to address any areas of deficiency. These plans should include integration of the assessment, development and metric use into personnel development programs.

Development of Personnel

The I-CAB Foundation’s Competency Assessment methodology was developed after significant research on a variety of educational and human resource based studies. In particular, The Dunning-Kruger Effect, which recognizes an inverse correlation between confidence and demonstrable competence in trained personnel that adjusts with increased experience. Other influences include Maslow’s Hierarchy of Needs and Fredrick Herzberg’s Motivator-Hygiene Theory, which work to understand individual motivation for job competency self-actualization and improvement. As such, the development of personnel can be greatly influenced by an employer and a strong area of focus for organizations.

Individual assessment results are designed to give individuals and their leaders the ability to make informed decisions related to competency development in conjunction with existing organizational metrics. This data is recognized as a key element of overall personnel competency and a valuable guide in the process of ongoing competency development.
Personnel and Contractors should be managed to ensure they are progressing as per the schedule noted in the Personal Assessment Process. Progress can be monitored using several different tools found within the I-CAB process. The Competency Management Report located in the Corporate Reporting area can be used to look at the overall competency of the organization and/or any contractors. The Participant Development page can be used to manage Development Plans of organization and contractor personnel.

The I-CAB Foundation uses the following personnel development cycle:

1. Complete Assessment
2. Review Assessment Results
3. Create Development Plan (as applicable)
4. Participate in Developmental Activities (as applicable)
5. Begin Reassessment

**Corporate Culture**

Implementing the I-CAB Competency Metrics across an organization should be seen as an opportunity to develop and reinforce the corporate culture as it relates to effective risk management. Competency metrics are not completed once and then forgotten, they are a part of an organizations commitment to continued development.

Organizational safety culture hinges on the beliefs and attitudes of personnel, so to affect positive change using I-CAB Functional Competency Assessment metrics, it is also recommended that organizations share information with personnel outside of the assessment process that will further develop their attitudes and beliefs towards continual development. These can be done through short monthly meetings or presentations. These times should be viewed as a method to talk, not only about the I-CAB process, but also about overarching aspects of continual development. We call these Competency Moments, and they can include discussion of past workplace incidents, regulatory expectations, organizational progress etc. that relate to competency.

The I-CAB Technical Paper can be used as a source of Competency Moment topics.
Appendix A
Corporate Account Set Up Guide
A copy of the Corporate Account Set Up guide is available on the I-CAB website. The guide will walk you through creation of a corporate account, purchasing of assessment credits and the addition of users.

The guide can be accessed at any time through the help menu in the upper right hand corner of the website.
Appendix B
Participant Account Set Up Guide
A copy of the Participant guide is available on the I-CAB website. The guide will walk users through creation of their individual account and assessment selection and process.

The guide can be accessed at any time through the help menu in the upper right hand corner of the website.
Appendix C
Selection Matrix for a Leadership Focused Implementation

**Selection Criteria**

- Supervises or advises others on regulatory requirements, meaning or interpretation of legislation and regulations
- Conducts hazard assessments as an employer representative
- Conducts inspections and/or investigations relating to regulatory compliance
- Audits or provides training on regulatory requirements within the jurisdiction
- Manages and/or makes decisions that directly impacts the execution of work, the selection and/or ability of equipment with regulatory applicability

**Exclusion Criteria**

- Administrative role support
- Senior management whose role is to manage the internal business function of the organization (non-operational)
- Trades people and/or workers conducting work on behalf of the organization where the scope of responsibility is limited to the execution of their own work under supervision

Assessments should be selected based on the work environment most common to the individual. Assessment competencies can then be further tailored, by their organization and by the individual, to align with job duties.
Appendix D

Gantt Template I-CAB Implementation

You can download the full Gantt [template here]. Please be advised that the timeline is only approximated, actual timeline will depend on the organization.
Appendix E
Common Criteria for Contractor Use

The following represent some suggestions for wording that can be included in contracts to incorporate use of the I-CAB Functional Competency Assessment and Development Process.

- Contractor personnel shall take functional competency assessments applicable to the work environment that they will execute a work scope in.
- Participation to include all individuals who plan, manage, supervise and/or advise on the activities/functions to be completed, or are for the benefit of the (Project/Site Name), i.e. on and off-site personnel, from the supervisor/general foreman, up to and including, directing management and risk advisory personnel.
- Contractors to establish and develop personnel to accepted target levels (average and peak), set by the contractor, that are relevant to the work scope and work environment (applicable to reports shared).
- Contractor shall provide access, upon request, to (Organization) electronic access to the I-CAB competency assessment data for all personnel involved in the delivery of products and services in relation to the (Project/Site Name).
- Personnel having completed I-CAB assessments to keep on their person at all times their I-CAB card and provide the card and I-CAB number upon request, to allow for the participation of personnel to be effectively verified as deemed beneficial.
Appendix F
Frequently Asked Questions
An FAQ section is available at any time through the help menu at the upper right hand corner of the website. This section is searchable and contains commonly asked questions for both the corporate user and the individual participant.
Appendix G

Help Videos

Help videos are available on a variety of topics from completing an assessment, to setting competency targets and sharing reports. Videos are also suggested to individual users in their My Assessments area based on their progress through the assessment process. Help videos are also suggested on pages where additional guidance may be needed. Look for the help video icon 🎬 to get additional guidance.

Help videos can also be found by visiting the Help menu in the upper right hand corner of the site at any time. Videos can also be found using the Search page, accessed by clicking on the area indicated below.
Appendix H
Communications
Personnel Notification Email (DRAFT)
Attention [Participant Name]

[UTILIZING ORGANIZATION NAME] is currently using a third-party assessment tool as a method of establishing the cumulative competency of our organization. This tool is accessed via a proctored web based interface that can be accessed on demand. Assessments are designed to measure an individual’s ability to answer questions of progressive difficulty that are jurisdiction and work environment specific. The assessment does not provide a passing score nor can a percentage be determined from the results provided. This assessment activity is an investment designed to provide you work related feedback on areas of beneficial improvement and establish a framework for your continual development.

Please note that this process is being used as a developmental tool and does not by itself deem competency (overview video). I have included a link containing all of the information you require to create an account, select an assessment, complete your assessment, as well as how to create a development plan (participant information).

Thank you.

Contractor Notification Letter (DRAFT)
Attention [Contractor Name]

[UTILIZING ORGANIZATION NAME] believes that demonstrable functional competency in operational personnel is a characteristic found in best-in-class companies and essential in achieving regulatory compliance. Functional competency is not only a regulatory requirement for anyone directing work activities, but is also predictive of a company’s ability to effectively prevent injuries and operate efficiently.

To assist with this effort, [UTILIZING ORGANIZATION NAME] is using an independent functional competency assessment process, delivered by the International Competency Assessment Board Foundation (I-CAB Foundation). An overview video can been viewed that provides a condensed overview of the process and intent. These functional competency assessments for [indicate type i.e. OHS, environmental etc.] legislation are specific to the jurisdiction/industry and are accessible through a web-based proctored interface (www.i-cab.org).

Effective [Effective Date], Contractors are asked to participate with [UTILIZING ORGANIZATION NAME] personnel and use the third-party functional competency assessment process administered by the I-CAB Foundation and have select personnel take functional competency assessments most applicable to the project, industry and/or services provided. Participation should include all individuals who plan, manage, supervise and/or advise on the activities/functions to be completed, or are beneficial for the [UTILIZING ORGANIZATION NAME] worksite(s). Participation shall include on and off-site personnel from the supervisor/general foreman, up to and including, directing management and risk management/advisory personnel. The competency capabilities metrics of Contractors’ personnel shall meet or exceed reasonable minimum expectations relevant to the work (targets are set by the contractor organization).

Access will be required to Competency Capability Reports for the Contractor organization as well as electronic access to the I-CAB Foundation competency assessment data for all personnel involved in the delivery of products and services in relation to [UTILIZING ORGANIZATION NAME] worksite(s).
Personnel having completed I-CAB Foundation assessments are required to keep on their person at all times their I-CAB card and provide the card and I-CAB number upon request, as the participation of personnel will be subject to ongoing verifications and reviewed when deemed relevant.

It should be noted that it is both a [UTILIZING ORGANIZATION NAME] and regulatory expectation that employer representatives of any company have the demonstrable functional competency required to ensure that the regulatory requirements are correctly applied to the work performed.