

# INTERNATIONAL STANDARD

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## Learning services outside formal education — Service requirements

*Services de formation fournis en dehors du cadre de l'enseignement  
formel — Exigences de services*



Reference number  
ISO 29993:2017(E)

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ISO copyright office  
Ch. de Blandonnet 8 • CP 401  
CH-1214 Vernier, Geneva, Switzerland  
Tel. +41 22 749 01 11  
Fax +41 22 749 09 47  
copyright@iso.org  
www.iso.org

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### Foreword

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

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see [www.iso.org/directives](http://www.iso.org/directives)).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see [www.iso.org/patents](http://www.iso.org/patents)).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

This document was prepared by Technical Committee ISO/TC 232, *Learning services outside formal education*.

ISO/TC 232 has also developed the following documents:

- ISO 29990:2010<sup>1)</sup>, *Learning services for non-formal education and training — Basic requirements for service providers*
- ISO 29991:2014, *Language learning services outside formal education — Requirements*

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1) The service requirements for a learning service provider contained in ISO 29990:2010 are addressed in this document. The management system elements for an educational organization contained in ISO 29990:2010 will be addressed in the future ISO 21001.

## **Introduction**

This document is intended to provide a generic frame of reference for quality learning services outside formal education by specifying its various elements and delivery.

The structure of this document reflects a typical sequence of experiences of learners and sponsors in a prototypical learning service, including advertising, information provided prior to acquisition of the service, needs analysis, design, assessment and evaluation.

However, the way in which the learning service is planned and delivered can vary depending on the context. The learning service provider (LSP) can implement a management system designed to ensure consistent delivery of service and conformity with this document.



# Learning services outside formal education — Service requirements

## 1 Scope

This document specifies requirements for learning services outside formal education, including all types of life-long learning (e.g. vocational training and in-company training, either outsourced or in-house). These include any learning services provided by a learning service provider (LSP) that are addressed to learners themselves, as well as to sponsors who are acquiring the services on behalf of the learners. The key features of these kinds of services are that the goals of learning are defined and the services are evaluated, and that they involve interaction with the learner. The learning can be face-to-face, mediated by technology, or a blend of both.

In cases where the learning service provider is part of an organization that delivers products (i.e. goods and services) in addition to learning services, this document only applies to learning services.

This document is not aimed at schools, colleges and universities providing learning services as part of a formal education system, but it can be useful to them as a tool for reflection and self-evaluation.

## 2 Normative references

There are no normative references in this document.

## 3 Terms and definitions

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

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <http://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

### 3.1

#### **assessment**

gathering of data to determine the *learning* (3.9) outcomes of an individual *learner* (3.8) or group of learners

### 3.2

#### **blended learning**

combination of different modes of *learning* (3.9)

Note 1 to entry: Modes of learning include face-to-face learning, IT-supported learning, among others.

[SOURCE: ISO 29991:2014, 2.4, modified]

### 3.3

#### **competence**

ability to apply knowledge and skills to achieve intended results

### 3.4

#### **curriculum**

plan of study prepared by the *learning service provider* (3.13) which describes the aims, content, *learning resources* (3.11), and *learning* (3.9) outcomes

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### 3.5 evaluation

systematic gathering of information, including the results of *assessment* (3.1) and *monitoring* (3.14), in order to make decisions about possible adjustments to the *learning service* (3.12)

### 3.6 facilitator

person who works with *learners* (3.8) to assist them with *learning* (3.9)

Note 1 to entry: A *facilitator* (3.6) is also often referred to as a teacher, a trainer, a coach, a tutor or a mentor.

[SOURCE: ISO 29990:2010, 2.8]

### 3.7 interested party

individual, group or organization with a direct or indirect interest in the *learning service* (3.12), including its management and outcomes, or the processes involved, or both

[SOURCE: ISO 29990:2010, 2.9]

### 3.8 learner

person engaged in *learning* (3.9)

[SOURCE: ISO 29990:2010, 2.11]

### 3.9 learning

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

[SOURCE: ISO 29990:2010, 2.12]

### 3.10 learning environment

classrooms, multimedia rooms and other physical or virtual spaces used for *learning* (3.9)

### 3.11 learning resource

material, environment, human resource, information or other asset that can be drawn on by the *learning service provider* (3.13) in order to facilitate *learning* (3.9) effectively

### 3.12 learning service

sequence of activities designed to enable *learning* (3.9)

[SOURCE: ISO 29990:2010, 2.13, modified]

### 3.13 learning service provider

#### LSP

organization or individual providing *learning services* (3.12) outside formal education, including any associates involved in the provision of the learning service

[SOURCE: ISO 29990:2010, 2.14, modified]

### 3.14 monitoring

continuous examination of progress achieved during the implementation of the *learning service* (3.12) to track conformity with the plan and to take necessary decisions to improve performance

### 3.15

#### **sponsor**

organization or individual that acquires *learning services* (3.12) on behalf of *learners* (3.8), that provides financial or other support for them, or that has a vested interest in the outcome of the *learning* (3.9)

Note 1 to entry: Sponsors include corporations, government agencies and individuals.

[SOURCE: ISO 29990:2010, 2.17, modified]

## 4 General information provided by the LSP

4.1 Prior to enrolment, learners and interested parties need information about the learning services in order to make an informed decision.

4.2 Information provided by the LSP shall be accessible, up-to-date, accurate and legible. This information shall include at least the following elements:

- a) name, address of headquarters, contact details, and locations where the learning services are provided;
- b) key management staff;
- c) description of the main learning services offered by the LSP;
- d) qualification or experience of facilitators in charge of the learning service, or both;
- e) teaching methods;
- f) description of learning environment and learning resources;
- g) any certifications, awards, qualification and accreditation offered.

## 5 Proposal development

5.1 When provided, a proposal enables the learners or sponsors to make an informed decision regarding the acquisition of the learning service.

5.2 Prior to developing the proposal, the LSP shall take appropriate steps to understand the learning request, its context and any logistical factors. This proposal shall include at least the following:

- a) the objectives and targets of the proposed learning services;
- b) the capacity of the LSP to address the client's needs (e.g. client references, technical characteristics, facilitators profile, example of similar programmes);
- c) the teaching and assessment methods to be used by the LSP in delivering the learning service;
- d) the price, terms and conditions.

## 6 Information provided prior to acquisition of the learning service

Before agreeing to the acquisition of the learning service, the interested parties shall be provided with the following information, as applicable:

- a) the title and objectives of the learning service;
- b) any prerequisites, technical or otherwise, such as a required level of competence;

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- c) dates, location, duration and timetable;
- d) the proposed number of hours of instruction and how these are divided between different modes of learning (e.g. face-to-face learning, blended learning, IT-supported learning);
- e) the teaching methods and the means of assessment to be used;
- f) required software licenses and technical equipment;
- g) tuition fees, examination fees, the purchase of learning materials (e.g. books, software, worksheets), any other charges and terms and conditions of payment;
- h) cancellation, withdrawal and refund policies;
- i) the procedures used for obtaining feedback about the satisfaction of learners (and, where applicable, of their sponsors), as well as for handling their requests, suggestions and complaints;
- j) the profile of the facilitators assigned to the learning service, such as their teaching qualifications, teaching experience and background.

## 7 Needs analysis

**7.1** Understanding the needs of learners is a key factor in the learning service as it ensures that the objectives, programme, content and assessment methods meet those needs.

**7.2** Prior to delivering learning services, the learning needs shall be analysed by qualified staff in order to orientate learning services effectively within the specified scope of the learning service.

**7.3** The intended outcomes of the learning services shall:

- a) be detailed, measureable and understandable to the learner (and, if applicable, to the sponsors);
- b) refer to a widely-known national or international scale, if available.

**7.4** The needs analysis shall determine:

- a) the goals and requirements of learners and sponsors;
- b) the desired level of competence and the preferred time frame;
- c) the purposes for which, and contexts in which, the learner requires the desired level of competence after the completion of the course (e.g. socially, in the domain of work or study);
- d) the learner's current level of competence;

NOTE 1 Techniques such as self-assessment, internal or third party tests can be used for this purpose.

- e) other aspects of the learner's background and situation (e.g. age, relevant education and training history, prior learning, professional experience, language, culture, literacy level, cognitive and physical abilities).

NOTE 2 ISO/TR 22411:2008 provides guidelines on services to address the needs of older persons and persons with disabilities.

**7.5** In the context of work-related training, interested parties shall be consulted on how the competences acquired are expected to be applied in the workplace and what they consider possible indicators of success.

**7.6** The results of the needs analysis shall be disclosed and agreed upon between the interested parties before the design and delivery of the learning service.

**7.7** Facilitators shall be fully informed about the results of the needs analysis.

**7.8** Information gathered about learners shall be only used for the purpose of providing the learning service. Information shall only be disclosed with the learner's consent.

## **8 Design of the learning service**

**8.1** Following the needs analysis, the design of the learning service consists of developing a curriculum, learning materials and means of assessment and evaluation.

NOTE One approach to the design of learning services is Instructional Systems Design (ISD)<sup>2</sup>.

**8.2** Curriculum design and development shall be carried out by facilitators who are experienced or trained in the design and development of curriculum for learning services.

**8.3** In the design of the learning service, the following shall be taken into account:

- a) the results of the needs analysis (see [7.4](#));
- b) the agreed-upon goals (see [7.6](#));
- c) the proposed intensity and duration of the course, and the modes of learning (e.g. face-to-face learning, blended learning, IT-supported learning);
- d) the intended learning outcomes;
- e) the intended means of assessment (see [12.1](#));
- f) the ratio of facilitators to learners;
- g) the methods, resources, and responsibilities to optimize the transfer of learning, if applicable;
- h) the type and content of a certificate of completion to be issued;
- i) any relevant contractual elements;
- j) the intended procedure of monitoring and evaluation (see [13.2](#)).

**8.4** Learning materials shall be:

- a) in line with the designed curriculum and with the selected modes of learning;
- b) authentic and up-to-date reflecting current application of the subject being learned, outside the course;
- c) selected taking into account social and cultural needs, as well as the background of the learners.

**8.5** The curriculum, learning resources, the means of assessment and evaluation shall be disclosed to learners or the interested parties, and to facilitators.

**8.6** The roles and responsibilities of the LSP, the learners and the interested parties relating to the delivery of the learning service and to the monitoring and assessment of learning shall be clearly specified.

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2) Information on ISD is available at the following site: [www.instructionaldesign.org/](http://www.instructionaldesign.org/).

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**8.7** The curriculum, learning and assessment materials shall be reviewed at least annually.

**8.8** The design shall take into account the results of evaluations of any prior similar learning services delivered by the LSP.

**8.9** Sources and copy rights of learning resources used or developed by the LSP shall be cited or acknowledged.

## 9 Information about the learning service for enrolled learners or their sponsors

Commencing with, or prior to delivery of the learning service, learners (or, where applicable, their sponsors) shall be informed in writing of the details, terms and conditions of the learning service, as specified in [Clause 4](#). Additional information may include the following:

- a) the responsibilities of each party (e.g. the learners, LSPs, facilitators);
- b) the processes and schedule for assessing learning;
- c) the LSP's designated contact person(s);
- d) procedures for complaints, suggestions and dispute resolution;
- e) support for learning, such as access to library, self-directed computer-assisted learning, help desk, counselling services, dictionaries, reference books and mentoring.

## 10 Service delivery

### 10.1 Staff engaged in the delivery of learning services

**10.1.1** The service shall be delivered by facilitators who are qualified and trained in delivering the learning service in question and are trained in the use of the methods and materials.

**10.1.2** Other staff engaged in the delivery of the learning service shall have the competence and qualifications required to accomplish their tasks.

**10.1.3** If substitution is required, arrangements shall be made to ensure that qualified facilitators are available, and that such facilitators are guided in the preparation and delivery of the learning service.

### 10.2 Learning material

**10.2.1** Learning materials shall be available to learners in sufficient quantity. Learners or their sponsors shall be guided in the purchase of those that are needed.

**10.2.2** Facilitators and learners shall be informed of relevant rules about the photocopying and use of printed and digital materials.

**NOTE** Many countries have strict rules about copyright and the reproduction and use of printed and digital materials, or arrangements for licensing the controlled use of such materials by LSPs. These rules can apply to materials developed by the LSP based on already published works.

### 10.3 Learning environment

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

**10.3.2** The learning environment shall be ergonomic and well-maintained. It shall also be:

- a) large enough to accommodate the number of learners enrolled in the groups as well as their facilitators;
- b) laid out in such a way as to facilitate interactive learning, taking into account the needs of the learners concerned;
- c) well-lit and clean;
- d) heated or cooled, if necessary, and well ventilated;
- e) protected or insulated from noise interference;
- f) equipped with learning aids and tools (e.g. as audio, video, projection devices, information technology equipment, flip charts, flash cards, models, puppets) relevant to the curriculum.

**10.3.3** The necessary safety facilities and equipment shall be put in place and maintained, and potential safety hazards in the learning environment shall be minimized. Procedures for dealing with emergencies and security issues shall be made known to facilitators, to other staff and to learners.

## 11 Facilitators

**11.1** Facilitators shall be either:

- a) experienced and have qualifications/training in teaching that are/is recognized within the country where the LSP offers its services; or
- b) supervised by experienced facilitators with qualifications/training.

NOTE Professional qualifications can be recognized by, for example, a governmental authority, an industry-created self-regulatory body, or an accredited university or college. In the absence of such recognition bodies, professional qualification can be deemed acceptable by those LSPs in the country providing courses in the relevant subject areas.

**11.2** All facilitators shall have the necessary competences in the relevant subject or skill areas to undertake the teaching and related duties assigned to them.

**11.3** Facilitators shall participate in professional development.

NOTE Professional development can include:

- learning and teaching principles, sound practice and latest research in learning and teaching methods relevant to the curriculum;
- teaching competences, resources relevant to the curriculum, including instructional and informational technologies;
- competence in using learning resources relevant to the learning services;
- practical experience in subject matter;
- competence in classroom management;
- assessment for the subject being learned.

**11.4** Professional development plans shall be established. These shall take into account (but not be limited to) assigned tasks and responsibilities, the results of the evaluation of the learning service and the facilitators' own views about their professional development needs.

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### 12 Assessment of learning

**12.1** In designing or selecting assessments, the following aspects shall be considered:

- a) intended use of the assessment;
- b) knowledge, skills and abilities to be measured;
- c) standards to be measured against;
- d) methods of assessment;
- e) scoring and reporting;
- f) interested parties involved in or affected by the assessment.

**12.2** Prior to, or at the beginning of the course, an assessment shall be made of the learner's level of competence in the subject to be learned.

NOTE For the assessment of the learner's level of competence, see [7.4](#), bullet d).

**12.3** The progress of learners shall be assessed throughout and at the end of the course.

NOTE For examples of the assessment, see [7.4](#), bullet d).

**12.4** Learners or their sponsors shall, upon request, receive a certificate of completion, which shall include (but not be limited to) the following information:

- a) title and objectives of the learning service;
- b) number of hours of instruction;
- c) level of achievement.

**12.5** Access to assessment results shall be given only to those with established authority or legitimate consent to view the information with regard for principles of fairness, transparency and confidentiality.

### 13 Monitoring and evaluation of the learning service

**13.1** Regular monitoring and evaluation shall be carried out in order to determine whether the learning service is meeting its objectives.

**13.2** In designing the processes for monitoring and evaluation, the following aspects shall be considered:

- a) scope;
- b) goals;
- c) means of monitoring and evaluation, including rationale, criteria, instruments and schedule;
- d) interested parties involved in or affected by monitoring and evaluation.

**13.3** Service evaluation shall include (but not be limited to) the following:

- a) fulfilment of learning needs;
- b) learning and teaching methods;
- c) adequacy of learning material and other resources;

d) logistics and organization of the learning service.

**13.4** Procedures for monitoring and evaluation shall include:

- a) periodic observation of teaching and learning for quality assurance purposes;
- b) review of assessment results and the alignment of these results with the agreed-upon goals of the learning service, as developed in the needs analysis. For this purpose, assessment of learning shall allow the compilation, comparison and analysis of assessment results;

NOTE For the assessment of learning, see [12.3](#) and [12.4](#).

- c) analysis of the level of satisfaction of learners and sponsors with the learning service, as well as their feedback and suggestions for improving the quality of the learning service;
- d) analysis of enrolment, attendance and attrition.

**13.5** Such monitoring and evaluation shall be conducted by qualified persons.

**13.6** Data sets and reports resulting from monitoring and evaluation shall be clear and transparent. Reports shall clearly describe the findings and the rationale in light of the learning service objectives.

**13.7** Any complaints and claims shall be dealt with within an agreed timeframe to provide redress or explanation.

**13.8** The results of monitoring and evaluation shall be taken into account in implementing improvements and changes to the learning service, such as in the curriculum, course programmes, teaching methods and professional development.

## **14 Invoicing**

**14.1** Invoices for the learning service shall be clear and shall contain all the details needed to enable learners (or, where applicable, their sponsors) to understand precisely what is being invoiced.

**14.2** The LSP shall provide the learner or the sponsor with proof of payment if requested.

## **Bibliography**

- [1] ISO 21001<sup>3)</sup>, *Educational organizations — Management systems for educational organizations — Requirements with guidance for use*
- [2] ISO/TR 22411:2008, *Ergonomics data and guidelines for the application of ISO/IEC Guide 71 to products and services to address the needs of older persons and persons with disabilities*
- [3] ISO 29990:2010, *Learning services for non-formal education and training — Basic requirements for service providers*
- [4] ISO 29991:2014, *Language learning services outside formal education — Requirements*

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3) Under preparation. Stage at the time of publication: ISO/DIS 21001:2017.



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