

Terms of Reference – Workbook Technical Reviewer

The workbook technical review will be conducted to establish the amendments made to the content of Institute workbooks, highlighting any inconsistencies against the syllabus and ensuring that the coverage is sufficient for candidates to successfully study and pass their examination.

The technical reviewer will be expected to provide a detailed review of the workbook and bring the majority of the review comments to the panel.

A. Requirements

The Workbook Technical Reviewer will be requested to support the CISI in the following ways:

- To have a high-level of knowledge of the subject area
- It should preferably be a subject panel member or industry practitioner (possibly a senior or technical advisor for qualifications or an industry trainer)
- Complete a workbook spreadsheet, including all comments of findings in the workbook – to be entered alongside each learning objective, indicating page numbers for ease of location
- Cross-check the workbook against the syllabus
- Ensure sufficient coverage of each learning objective to enable a good level of Understanding
- Highlight any inconsistencies within the text and the learning objective
- Highlight any grammatical, typographical or statistical/numerical errors
- Highlight if the syllabus is unclear for coverage to be sufficiently established
- Indicate where industry information is out of date and/or missing
- To ensure all tabular data is correct
- Review workbook for structure
- Ensure all learning objectives are in the relevant chapter, for example LO 2.3.2 should be in chapter 2
- Cross reference all end of chapter and multiple choice questions to ensure they can be found against the references provided and to ensure they are covered in the syllabus

- Ensure multiple choice questions are presented at the same or similar level as those compiled for the subject question banks

Should you be able to take part, CISI would like to request a level of commitment in taking this workbook forward. These are:

- Attend 2 meetings per year (these would fit around your timetable and would be booked in advance to ensure your availability to attend)
- Be available for occasional phone or email contact between meetings for advice and/or support to the author or candidates
- Be prepared to review the workbook in relation to industry and syllabus changes and propose improvements
- Be familiar with the CISI examination process in the development of the workbook.
- Be prepared to have your name, role and company named in CISI material relating to the governance of our workbooks
- Be committed to the development of the workbook for at least one year, when the roles will be reviewed

Time Allocation

3 weeks

Fee

Negotiable

B. Biography

Please attach a short career biography of 100 words summarising career background, and relation to the workbook that you would like to work on. Also please state exact job title and the full name of the organisation, including the division that you work for.

The CISI assumes that by submission of biographical data and job title and firm that permission is granted to the CISI for these to be used responsibly in describing (outside the CISI) the quality assurance processes you would be involved in and your support of the workbook.

If you agree with sections **A.** and **B.** above please sign below and return a signed copy:

Name: _____ Date: _____

