



# INFORMATION PACKAGE



## **RETA Authorized Instructor (RAI) Requirements and Guidelines**

*The goal of the RETA Authorized Instructor program is to make quality Industrial Refrigeration instruction widely available to businesses and individuals who operate industrial refrigeration systems.*

A RETA Authorized Instructor (RAI) provides high-quality training focusing on safety and the improvement of operational and maintenance competency in the industrial refrigeration environment. The RAI may use RETA's standardized training material as well as other materials such as machinery specific operating and maintenance manuals necessary to provide the instruction.

### **RAI Benefits**

1. RAIs are nationally recognized as qualified providers of industrial refrigeration instruction and/or training to the industrial refrigeration industry.
2. RAIs will receive recognition in RETA communications and will thus gain national exposure to a wide market as providers of industrial refrigeration training to the industrial refrigeration industry.
3. RAI's are provided the correction key information for the RETA book for-credit final exams. RAI's are encouraged to correct their student's final tests and review information that needs to be reinforced based on test score results.
4. RAI's have the option of using the RETA WebEx® subscription system to deliver distance training to the customer. Details, policy, fees are found in Attachment 900-6.
5. RETA resources sold at discounted rate.



## RAI Qualifications

1. All RAIs must sign and operate under the specifications of the RETA Code of Conduct.
2. In addition to maintaining a current CIRO credential, RAI applicants shall demonstrate through documentation that they have been evaluated as an instructor from an acceptable training center.

RAIs must be capable of:

- properly doing a needs assessment,
  - developing a curriculum,
  - developing and using lesson plans,
  - establishing and maintaining a good learning environment,
  - delivering a training message and instruction effectively,
  - establishing a measurement system for student learning,
  - demonstrating an ability to establish and maintain a record keeping system.
3. RETA expects each RAI to refrain from teaching topics for which he/she is not fully qualified by training, education and experience.
  4. Each RAI shall submit documentation of six years of industrial refrigeration industry experience subject to review by the RETA education committee prior to issuance of RAI certificate.
  5. All RAIs shall sit for and pass an RAI qualification examination with a score profile as determined by the Certification committee. The certification committee may recommend alternate pathways or documentation to meet this requirement.
  6. The RAI shall provide documentation of PDH / CEU acquisition to demonstrate continued learning and development in the operation and maintenance of industrial refrigeration systems.



## RAI Application Review and Approval

1. RAI applicants shall submit a completed RAI Instructor Application Form (Form: AI 3504), a resume and, the names of four professional references.
2. RAI credentials are issued only after review by the RETA staff and the RETA Education Committee and approval of the candidate's application. The RETA Education Committee may request a verbal interview prior to approval.
3. The initial instructor's credential fee is set by the board, and renewal of the credential is required every three years. RETA reserves the right to adjust fees as RETA deems appropriate.

## RAI Curriculum Approval

RAIs are *not* required to submit an all-inclusive curriculum, only documentation supporting a comprehensive curriculum. **Provide an example of an outline of training objectives and how you will meet those objectives.** The use of supplemental training material from original equipment manufacturers (OEMs), design and engineering firms, and other vendors is encouraged; supplemental material should be listed as an addendum to the curriculum. Supplemental material shall support the aims of the curriculum and not conflict with the RETA Mission Statement.

The RAI shall submit a curriculum (Form AI 3504-2) to the RETA staff with the initial application. **It is expected that RETA's most current standardized training material will be used.** Course plans using other material shall demonstrate that the material supports RETA's Mission Statement for the industrial refrigeration industry. The committee reserves the right to request additional information if necessary.

Submitted course plans shall list specific areas of instruction in systems and components, including theories. An RAI may go beyond the submitted curriculum in order to tailor a course to a client's specific needs (for example, site specific SOP training). Special system training should be noted as an optional service provided by the RAI when curriculum is submitted.



### **RAI Credential Maintenance Requirement**

Renewal of the RAI credential is required every three years. Renewal is contingent on:

1. Maintaining RETA membership in good standing.
2. Maintaining their RETA CIRO certification.
3. Satisfactory adherence to the requested documentation necessary for RETA's RAI Program. RAI "Trainer Evaluation Form" (Form AI 3504-3) shall be submitted to RETA headquarters subsequent to RAI training.

The RAI shall supply students with a trainer evaluation form (Form AI 3504-3) to be completed and forwarded to RETA Headquarters by the student, or class, in an instructor provided pre-addressed envelope.

RAI's are required to forward students' test answer forms to RETA Headquarters for grading and processing so that the RETA Certificate of Completion (CoC) may be issued. CoCs are then sent to the instructor in unsealed oversized envelopes for signature and distribution.

4. RAI performance reviews are satisfactory.
5. Renewal application forms and fees are correctly submitted.

### **Restrictions**

1. RAI marketing claims shall be in compliance with the policies and procedures of the RETA Certification Program.
2. RAI advertising and marketing claims shall **not** state the courses are "RETA Certification Exam Preparation" courses. Allowable language states that the course content covers information published by RETA, or other authors, that may be represented in RETA Certification Exams.
3. RETA does not authorize any course or class that is given solely for the purpose of passing a RETA certification exam.
4. RETA does not approve specific courses. RAI's may not advertise courses as "RETA Approved". RAIs may market themselves as RETA Authorized Instructors, i.e. Instructors name followed with RAI™ on business cards and other correspondence documents.
5. RAI self styled certificates may not reference RETA, nor contain the RETA logo. The RAI emblem and registration number may appear on the RAI's certificate.



6. Self-styled certificates shall be approved by RETA
7. RAI agrees that usage of RETA's name and RAI seal will be restricted to matters related to this Agreement or in conjunction with the RAI's organizational name, and that the exploitation of such right of usage shall be to the best advantage of the protection of the name and good will of RETA
8. In connection with the use of the RETA's name and RAI seal, RAI agrees to not represent that it has any ownership in the RETA's name and RAI seal.

### **RETA's Responsibilities to RAIs**

1. To protect the RETA RAI emblem by registering it with the United States Patent and Trademark Office.
2. To promote RAIs through the RETA web site - "Education Resources" page(s).
3. To direct persons calling or writing RETA in search of trainers or instructors to the RETA website or by other means to provide the current contact listing of RAIs.
4. To support RAIs with available RETA resources sold at a discounted rate to RETA RAIs.
5. On direction from the RAI, RETA Headquarters will drop ship book orders to the RAI customer.
6. To correct and/or process the RETA Course final exams and the certificates of completion and student letters of accomplishment. These documents are returned to the RAI in an un-sealed oversized envelope for the RAI to sign, and include any additional supplemental communications, and mail to the student(s).
7. To document the achievement of students at RETA Headquarters including who they received their training from, i.e. RAI, and maintain these records.
8. To monitor the performance of all RAIs by observing student success rates and reviewing student evaluations of their instructors.
9. To continue to improve RETA coursework materials.
10. To enforce RETA policy and procedures.



## **Relationship Between RAI and Clients – Separation from RETA Headquarters**

1. The agreement for training is between the RAI and the client or company hiring them.
2. All fees are paid to the RAI directly by the customer.
3. RETA shall not be responsible for any financial obligations of any RAI entities in the course of their business affairs.
4. RETA Headquarters does not provide booking and logistical services for RAI classes. All logistical arrangements are between the RAI and the student or company by the RAI.
5. RETA and RAI agree that this Agreement is not intended to create any agency relationship of any kind; and RETA and RAI agree not to contract any obligations in the name of the other, or to represent that RETA is in the business of providing the products and/or services provided by RAI.

## **License and Privileges**

RAIs are permitted to use the RETA name and RAI seal in conjunction with their organizational name. The RAI seal remains the property of the RETA national organization and may not be otherwise reproduced without written consent and approval from RETA. RAI shall at no time adopt or use, without RETA's prior written consent, any word or mark which is so similar to the RETA's name and RAI seal so as to cause confusion with the RETA's name and RAI seal.

## **Termination**

1. The RAI agreement may be terminated upon written request by an RAI who chooses to end the relationship.
2. RETA may initiate termination when an RAI fails to maintain their credential through the renewal process, or by cause.
3. The effective date for execution of a termination is 30 days after the date of notice.
4. Upon termination of this Agreement in any manner, RAI shall immediately cease and desist from all use of the RETA's name and RAI seal.



## **Refund of Application Fee**

There will be no refunding of application fees once the process has been started.

## **Indemnification**

The RAI shall indemnify, defend and hold and save RETA, its officers, directors, employees and agents and their heirs, administrators and executors, and each of them, harmless from any and all actions and causes of action, claims demands, liabilities, losses, damages or expenses, of whatsoever kind and nature, including judgments, interest and attorney's fees and all other reasonable costs, expenses and charges which RETA, its officers, directors, employees and agents and their heirs, administrators and executors, or any of them shall or may at any time, or from time to time, subsequent to attaining RAI status sustain or incur, or become subject to by reason of any claim or claims against RETA, its officers, directors, employees and agents and their heirs, administrators or executors or any of them for any reason resulting from any of them, carrying out the terms and conditions of this Agreement, except for gross negligence, willful misconduct, criminal acts or omissions, or breach of this Agreement on the part of RETA, and provided further that RETA, its officers, directors, employees and agents and RETA, its officers, directors, employees and agents and their heirs, administrators, executors, or any one of them promptly notifies the RAI and its general counsel of adverse claims or threatened or actual lawsuits. RETA, its officers, directors, employees and agents and their heirs, administrators or executors, as appropriate, shall provide complete cooperation to RAI, its attorneys and agents in such case to the extent possible.

RETA shall indemnify, defend and hold and save the RAI harmless from any and all actions and causes of action, claims, demands, liabilities, losses, damages or expenses, of whatsoever kind and nature, including judgments, interest and attorney's fees and all other reasonable costs, expenses and charges which the RAI shall or may at any time or from time to time subsequent to the date of this Agreement sustain or incur, or become subject to by reason of any claim or claims against the RAI for any reason resulting from any allegation that the standardized training materials infringe any third party intellectual property rights and provided further that the RAI promptly notifies RETA and its general counsel of adverse claims or threatened or actual lawsuits. The RAI shall provide complete cooperation to RETA, its attorneys and agents in such case to the extent appropriate.



## THE APPLICATION REVIEW PROCESS

RETA Staff will review your application upon its arrival. This is a description of the process they will go through:

Staff will:

- Contact you to confirm that your application did arrive intact at headquarters.
- Review your application for completeness
- Deposit your fee
- Contact the institution or learning center that you state trained and evaluated you as an instructor.
- Contact the references you provide in the application
- Review the curriculum you provide
- Send a recommendation to the Education Committee regarding your application. A meeting will be scheduled.
- Meet with the Education Committee to review your application
  - If necessary, a conference call will be scheduled with you to interview with the Education Committee – it is possible that you will be asked to present a portion of a lesson via the internet using the WebEx tool RETA subscribes to.
- Upon acceptance RETA Staff will:
  - generate your credential
  - issue a certificate of recognition as an RAI
  - establish your registration number (the numbering is randomized so as to not indicate #1, #2 and so on)
- Contact you again to receive your updated contact information for posting on the RAI resource page on the RETA Website
- Send you the hardcopy of the paperwork and resources you'll use as an RAI
- Include your name in a press release announcing your achievement as an RAI
- Announce your achievement in the next RETA Breeze

This process may take 3 to 4 weeks, depending upon the thoroughness of the application data and the reference check process.



**R. RETA Authorized Instructor Policy**

Qualification Examinations

1. Candidates for RAI certification must pass an examination to demonstrate their mastery of industrial refrigeration principles, safety and operations.
  
2. RAI candidates may meet this requirement by passing the CIRO exam if they meet or exceed the following profile of scores as a CIRO candidate:
  - a. System Fundamentals 24 of 30 questions correct (80%)
  - b. Safety 9 of 12 questions correct (75%)
  - c. Electricity 9 of 12 questions correct (75%)
  - d. Refrigeration system operation  
47 of 57 questions correct (82%)
  - e. Measuring system performance  
11 of 14 questions correct (79%)
  
  - f. Total score 100 of 125 correct (80%)
  
3. RAI candidates who do not meet the CIRO profile stated in this policy or are not eligible to take the CIRO exam must qualify for RAI certification by passing the RAI exam. RAI candidates who apply prior to January 1, 2009 may meet this requirement with one attempt to qualify by meeting the CIRO profile stated in this policy.
  
4. No RAI candidate may take either the CIRO or RAI exam more than once in any four-month period.



# Authorized Instructor

## INSTRUCTOR APPLICATION FORM AI 3504

DATE: \_\_\_\_\_

*Please print.*

**INSTRUCTOR ID** \_\_\_\_\_

*Official use only*

NAME: \_\_\_\_\_ ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE NO. \_\_\_\_\_ FAX NO. \_\_\_\_\_

RETA MEMBER NUMBER: \_\_\_\_\_

I have read and agree to the terms and specifications listed in Attachment 900-1 RAI Program policy and procedure and submit this application to be a RETA Authorized Instructor.

\_\_\_\_\_  
Signature

### Four References Required:

1. Name: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Professional Relationship: \_\_\_\_\_

2. Name: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Professional Relationship: \_\_\_\_\_

3. Name: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Professional Relationship: \_\_\_\_\_

4. Name: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Professional Relationship: \_\_\_\_\_

*Additional Information may be attached to this form.*



# **Authorized Instructor**

## **INSTRUCTOR APPLICATION FORM AI 3504**

- Attach your resume to the application
- Please attach your payment of \$425
- Include documentation of your evaluation as an instructor by a training center.



# Authorized Instructor SAMPLE CURRICULUM SUBMISSION FORM

DATE: \_\_\_\_\_

INSTRUCTOR ID \_\_\_\_\_  
*Official use only*

*Please print.*

NAME: \_\_\_\_\_ ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE NO. \_\_\_\_\_ FAX NO. \_\_\_\_\_

Select all that apply

- RETA Coursework     
  Customized RAI Program     
  Supplemental Material     
  Site-specific Facility Training

**Attach proposed curriculum** and objectives statement.

**It is expected that RETA's most current standardized training material will be used;** course plans using other material must demonstrate that the material supports RETA's mission statement for the industrial refrigeration industry. Submitted course plans must list specific areas of instruction in systems and components, including theories. RAIs are *not* required to submit an all-inclusive curriculum, only documentation supporting a comprehensive curriculum.

*Official Use Only*

Date: \_\_\_\_\_

CURRICULUM ID: \_\_\_\_\_

Approved by Educational Committee     
  Denied by Educational Committee

Committee Chair person: \_\_\_\_\_ Signature: \_\_\_\_\_

Form: AI-3504-1



RETA AI #063008001

**REFRIGERATING ENGINEERS  
AND  
TECHNICIANS ASSOCIATION**

**Issues this document to**

**R. A. Instructor**

**RETA Authorized Instructor Credential**

**Authorized Field: Industrial Refrigeration Operation – Maintenance as defined in  
ARTG-GDL1 (Ammonia Refrigeration Training Guideline)**

This credential authorizes the holder to teach RETA industrial refrigeration coursework and all subjects pertaining to the field of industrial refrigeration in classes organized primarily for adults. In addition, this credential authorizes the holder to develop curricula and specially designed content instruction to meet the specific educational needs of the student(s).

**Valid: September 13, 2008 to September 14, 2011**

To renew this credential, the holder must complete the requirements specified by RETA.

\* \* \* \* \*

Scott Henderson  
RETA – Education Director

Stephan Shaub  
President 2007-2008



# Authorized Instructor TRAINER EVALUATION FORM AI 3504-3

DATE OF TRAINING: \_\_\_\_\_

INSTRUCTOR ID \_\_\_\_\_

ARE YOU A RETA MEMBER? \_\_\_\_\_

*Official use only*

STUDENT'S CONTACT INFORMATION:

NAME: \_\_\_\_\_ PHONE NO. \_\_\_\_\_

LOCATION OF TRAINING: \_\_\_\_\_

COURSE NAME: IR-1 IR-2 IR-3 IR-4 BE-1 BE-2 CT&F 1 CT&F 2

NAME OF INSTRUCTOR(S): \_\_\_\_\_

Please respond to the following statements where 1 represents "Strongly Disagree ☹️" and 5 represents "Strongly Agree 😊." Please feel free to provide comments in the lines below each statement.

The teaching environment was clean and satisfactory.



1

2

3

4



5

COMMENTS: \_\_\_\_\_

The instructor was effective in teaching the material.



1

2

3

4



5

COMMENTS: \_\_\_\_\_

The instructor was able to relate the material taught to my application.



1

2

3

4



5

COMMENTS: \_\_\_\_\_



# Authorized Instructor TRAINER EVALUATION FORM AI 3504-3 - PAGE 2

DATE OF TRAINING: \_\_\_\_\_ STUDENT NAME: \_\_\_\_\_

The instructor conducted him/herself in a professional manner.

☹️ 1 2 3 4 5 ☺️

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

I would recommend the instructor to others.

☹️ 1 2 3 4 5 ☺️

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

What did you like most ☺️ about this training experience?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What did you like least ☹️ about this training experience?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please mail to**  
RETA Headquarters  
c/o: Education Committee  
P.O. Box 1819  
Salinas, CA 93902

OR

**Fax to (831-455-7856)**  
Phone Number: (831)-455-8783



# Refrigerating Engineers & Technicians Association

## Michael Keller

Has satisfactorily completed the required studies and examinations course in

### Industrial Refrigeration I

and is entitled to this Certificate of Completion  
**April 18, 2008**

Stephan L. Shaub  
2007-2008 President



John Trainer  
RETA Authorized Instructor™  
Registration # 14587

RAI LOGO  
HERE IN THIS GENERAL  
AREA OF THE CERTIFICATE

# Authorized Instructor Organization Name

## Michael Keller

Has satisfactorily completed the required  
studies and examinations course in

### Automatic Valve Service

and is entitled to this Certificate of Completion  
**April 18, 2008**



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John Trainer

**RETA Authorized Instructor**  
Registration # 14587