

**A guide to Customised Qualifications**

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# Section 1

## Introduction

Thank you for choosing NCFE’s Customised Qualifications.

The main aim of this guide is to help explain the application and accreditation process as well as how to register your learners.

Hopefully this guide will answer all of your questions, however if you need any additional advice or guidance, our Customer Support team is available to support you further.

Email: Customersupport@ncfe.org.uk

Call: 0191 239 8000

# Section 2

## About Customised Qualifications

Customised Qualifications allow you to have an unlimited number of qualifications accredited for one annual fee. This cost-effective model is ideal for any organisation looking to develop qualifications with unique content that falls outside of our portfolio of regulated qualifications.

This service allows you to gain accreditation from a national awarding organisation, providing reassurances that your qualification(s) are of a high standard.

Customised Qualifications are written and owned by you, so although we won’t advertise your qualifications, we’re happy for you to market them by referring to NCFE accreditation.

You can also use our Customised Qualification logo on any learning materials associated with your Customised Qualification, once it’s approved and accredited, and we’ll include your logo on the certificates we award to your learners.

The guiding principles for Customised Qualifications can be found in Appendix 1.

August 2018

# Section 3

## Becoming an NCFE centre

If you don’t currently work with NCFE and want to offer a Customised Qualification, you’ll need to apply for centre approval, using the Customised Qualification Application Form (New NCFE Centre).

When we receive your Customised Qualification Application Form (New NCFE Centre) this is what will happen next:

1. Our Finance team will carry out a credit check of your centre (1).

2. A member of our Processing team will process your application and allocate a regional External Quality Assurer (EQA).

3. Once an EQA has accepted the allocation, we’ll email you within 5 working days of receiving your application to confirm the name of your EQA. They’ll also tell you that your allocated EQA will contact you within 2 working days to arrange a mutually convenient date and time for their review.

**Approval Advisor:**

1. Within 2 working days of being allocated your centre, the EQA will email you to introduce themselves and to outline what you need to do for the review, the format of the review and to arrange a date to conduct the approval and answer any queries you have about the process.

2. The EQA will then either call you a couple of days later to agree a visit date and time; or will send you an email with suggested dates and times and contact you later to confirm which is most suitable. Your EQA will advise if you require an on-site approval visit or if a remote approval can take place.

3. On the day of your approval, the EQA will check that you meet our approval criteria and that you’ve everything in place to successfully deliver NCFE Customised Qualifications and units. The visit could last up to a full day.

4. The EQA has 2 days after the approval to write their report and to email you a copy confirming whether or not you’ve met our approval criteria. If you haven’t fully met our criteria, your EQA will provide details of what you need to do to meet the criteria.

Please note: You need to be ready for an approval review within 3 months of submitting your application. Any centres not ready for an approval review within 3 months will have their application to become a centre reviewed by our Approvals team. Our approval criteria and approval support documents can be found at qualhub.co.uk.

**Approval Confirmation**

1. If the approval review was successful, we’ll add your details to our database and send you confirmation of approval by email within 5 working days. We’ll send you a copy of the report, a centre certificate, and invoice for the cost of the approval visit.

1. NCFE uses Credit Safe to perform credit checks on new centre applications which are not public sector organisations for the purposes of deciding whether to offer credit, and also to prevent fraud, money laundering and any other unlawful activity. We reserve the right to request that a blended credit check be undertaken using these details. A blended check allows us to gain insight into the wider business interests and track records of the people behind the company, as well as the company’s data. This credit check against individuals may subsequently show on an individual’s credit history.

From this check and where appropriate, NCFE may refuse credit and / or custom without further explanation.

# Section 5

## Guidance for writing Customised Qualifications

Need help writing your learning outcomes and assessment criteria, or choosing the most appropriate assessment method(s)?

Our Guidance for writing Customised Qualifications will be able to help you.

You can download a copy from our website <https://www.ncfe.org.uk/accreditation-and-employer-services/customised-qualifications>

# Section 6

## Occupational Competence Guidelines

 Staffing requirements Organisations must:

 • have a sufficient number of appropriately qualified/experienced Assessors to assess the volume of learners they intend to register

• have a sufficient number of appropriately qualified/experienced Internal Quality Assurers to internally quality assure the anticipated number of Assessors and learners

 • ensure that all staff involved in assessment and Internal Quality Assurance are provided with appropriate training and undertake meaningful and relevant continuing professional development

• implement effective Internal Quality Assurance systems and processes to ensure all assessment decisions are reliable, valid, authentic, sufficient and current. This should include standardisation to ensure consistency of assessment

• provide all staff involved in the assessment process with sufficient time and resources to carry out their roles effectively.

**Assessors and Internal Quality Assurers**

Staff involved in the assessment and Internal Quality Assurance must be able to demonstrate that they have (or are working towards) the relevant occupational knowledge and/or occupational competence, at the same level or higher as the Customised Qualification being assessed and internal quality assured. This may be gained through experience and/or qualifications. Please note: You must have an Internal Quality Assurer who is not involved with the delivery or assessment of your qualifications. They must be a different member of staff. This role can be contracted out if you don’t have anyone occupationally competent to undertake this role internally.

# Section 7

## Registering and certificating learners

The easiest way to register and keep track of your learners’ progress is to use the NCFE Portal, our online learner administration interface. You can use the NCFE Portal to:

 • register learners

 • claim certificates

 • download forms, invoices, and reports

 • view your learners’ status 24 hours a day.

To access the NCFE Portal you need to apply for a username and password. This can be done by completing the NCFE Portal registration form which is located on the NCFE Portal section of our website.

Once you have your username and password you can log on and start registering your learners.

Once your learners are registered with NCFE we’ll allocate a unique ‘batch reference number’ to your group. The batch reference number is used to track groups of learners from registration to certification and you should use this batch number when making enquiries.

Please ensure that you register your learners with NCFE as soon as possible. This ensures you receive all the help and support you need from us, including prompt allocation of your External Quality Assurer. Your External Quality Assurer won’t be able to visit until you’ve registered learners.

**Direct Claim Status**

Direct Claim Status (DCS) is a scheme that will enable you to claim learner certificates without needing authorisation from your External Quality Assurer (EQA).

DCS is granted at a centre level so there is no need to independently achieve DCS on each Customised Qualification that you run.

For DCS to be achieved, your centre must show the following within your EQA report:

- No outstanding actions from your previous EQA visit report

- At least 3 completed learning portfolios shown as being sampled

- Grade 1,2,3 exclusively against all report criteria

If your centre achieves DCS then you will be able to claim certificates for the next 12 months without having to gain authorisation from your EQA.

# Section 8

## External Quality Assurance and reviews

The purpose of the review is to check the internal quality assurance systems.

The External Quality Assurer (EQA) will monitor the quality and consistency of any assessment decisions made and review the internal quality assurance taking place within your centre.

In addition, the EQA will also review your scheme of work for your Customised Qualification, to ensure that the learning and assessment are being delivered effectively and to also check that CVs of all staff involved in the delivery of your Customised Qualification.

Once you have registered learners on your Customised Qualification you will be allocated an EQA. You are entitled to one free visit per session as part of the Customised Qualification. Additional visits can be requested for a small fee (please see our latest Fees and Pricing guide online for more details).

During your first quality review, your EQA will provide support and guidance to help you deliver your Customised Qualification effectively and will review your learners’ work to make sure you’re on the right lines.

After each review you will receive a report summarising the visit. The report will provide positive feedback and details of any actions that you may need to complete.

The reports undertaken by your EQA will also determine if your centre is entitled to Direct Claim Status (DCS). See Section 7 for more information

**The role of the NCFE External Quality Assurer (EQA)**

The External Quality Assurer (EQA) forms a vital link between the centre and NCFE, acting as our quality assurance agent to ensure systems are maintained. This is a vital role in ensuring learners continue to achieve the necessary standard.

The External Quality Assurer is required to perform 3 main functions:

 • Monitor procedures to ensure the centre’s internal assessment and quality assurance decisions are in accordance with NCFE requirements.

 • Maintain records of external quality assurance and provide feedback to NCFE in the form of a report.

 • Provide information, advice and support to centres

# Section 9

## Fees

Customised Qualifications are a cost-effective way for centres who want to develop several qualifications. Fees comprise of 3 separate elements – an initial approval fee; an annual fee; and the combined registration and certification fee for each learner.

Please note that to become a Customised Qualifications centre you’ll need to become an Approved Centre. If you offer additional NCFE qualifications outside of your Customised Qualification, you’ll also be charged the Annual Approval fee.

**Initial Approval Fee** – £500 The initial approval fee contributes towards the cost of assessing the eligibility of the centre for the licence, the Approval Advisor visit and the administrative costs of the approval. The fee is non-refundable.

**Annual Fee** – £2,000 The annual fee allows you to develop, deliver and evaluate an unlimited number of Customised Qualifications. It contributes towards the costs of providing a team of External Quality Assurers. It also covers the ongoing support of NCFE’s Accreditation and Employer Services team for all centres. The annual fee will be invoiced at the beginning of each year (1 August).

**Registration and Certification combined fee – £15 per learner**

This contributes towards the administration costs of registering and, where applicable, issuing a certificate for a learner. The combined registration and certification fee is invoiced at the point of registration.

**Review fee for level 4 and above qualifications**

An additional fee is applicable if you’re looking for accreditation for a qualification that is at level 4 or above. The standard fees will apply for first and second reviews, but there will be a reduced fee for any third and fourth reviews that are needed. This is set at half the cost of first and second reviews. So for example, the cost of a first and second review of 1-5 units would be £500, this would then reduce to £250 for a third and fourth review. (Please see table below).

**Sector Expert Reviews**

This is an optional, additional review fee that is non-refundable. Centres can choose to have their qualifications reviewed by an expert in their chosen sector / subject area to give more detailed feedback contextualised to that sector / subject. (Please see table below).

|  |  |  |
| --- | --- | --- |
|  | **1st & 2nd review** | **3rd & 4th review** |
| **1-5 Units** | **£500** | **£250** |
| **6-10 Units** | **£750** | **£375** |
| **11-15 Units** | **£1000** | **£500** |
| **16-20 Units** | **£1250** | **£625** |
| **21-25 Units** | **£1500** | **£750** |
| **+5 Units** | **+ £250** | **+ £125** |

# Section 10

## Stipulations for advertising and promoting Customised Qualification

NCFE’s Customised Qualifications are designed to accredit bespoke qualifications which fall outside NCFE’s national portfolio of regulated qualifications. Qualifications of recognised bespoke education or training are regarded by our qualification Regulators (1) to be ‘unregulated’ provision – but are subject to Condition B5, ‘Representations regarding qualifications’ as follows:

**B5.1 - Statements regarding qualifications which are not regulated qualifications**

 *An awarding organisation must not (and must take all reasonable steps to ensure that any person connected with it does not) make any statement that would be likely to lead Users of qualifications to believe that a qualification it makes available is a regulated qualification when it is not a regulated qualification.* ***– Ofqual and CCEA***

*An awarding body must not (and must take all reasonable steps to ensure that any person connected with it does not) make any statement (via any act or omission) that would be likely to lead Users of qualifications to believe that a qualification it makes available (whether regulated or not) is an Approved, Designated or regulated qualification when it is not an Approved, Designated or regulated qualification -* ***QW***

**B5.2 - Advertising and promotion of qualifications**

 *An awarding organisation must not (and must take all reasonable steps to ensure that any person connected with it does not) advertise or promote its qualifications in a manner that is likely to be misleading to Users of qualifications.*

As an Approved Centre of NCFE you’ve already followed our Approval Criteria and completed the NCFE Application to become an Approved Centre. In order to continue to work with us and enable us to maintain compliance for the General Conditions or Recognition you shall be responsible for the content, accuracy and legality of any Customised Qualification information or material. This includes all advertising and promotional qualification information or material which is printed; or on any website; or in any electronic form, which must adhere to our Regulators Condition B5.1, ‘Statements regarding qualifications which are not regulated qualifications’; and Condition B5.2, ‘Advertising and promotion of qualifications’.

All Customised Qualifications that are accredited by NCFE are subject to the Stipulations for advertising and promoting Customised Qualifications. NCFE reserves the right to verify what it considers advertising or promoting Customised Qualification(s) in a manner that is likely to be misleading to learners. Any confirmed breach of these Stipulations, by your centre, shall be deemed unacceptable by NCFE and NCFE has the right to withdraw accreditation of the Customised Qualification(s) immediately and without notice.

1. The Regulators are the Office of the Qualifications and Examinations Regulator (Ofqual) in England, Qualification Wales (QW) and CCEA Regulation in Northern Ireland.

# Section 11

## Using the Customised Qualifications logo

We provide all approved Customised Qualification customers with a logo in order for them to promote their provision with us. You can use this logo on any documentation or media relating to your Customised Qualification(s).

Instructions for the use of our logo are in Appendix 3.

The NCFE Customised Qualifications logo will appear on your learner certificates. You can also include your centre’s logo and/or a signature on certificates. To include your logo on learner certificates please send us a high-quality PNG or JPEG, to add a signature please contact the Accreditation and Employer Services team on accreditationteam@ncfe.org.uk

# Appendix 1

## Guiding principles for Customised Qualifications

The Customised Qualification service is underpinned by the following principles:

 • The ownership of qualification design and content remains with the centre

• Customised Qualification details are regarded as confidential to the centre and to NCFE and will not be divulged by NCFE to a third party without prior agreement from the centre

 • The content of the Customised Qualification is original and doesn’t infringe on any third party copyright or Intellectual Property Rights. NCFE can in no way be held responsible for infringements

• The delivery staff are occupationally competent in the subject area

• The centre will let NCFE know of any changes to their Customised Qualifications within 2 weeks of the change(s) taking place

 • The centre will not advertise and promote provision as accredited by NCFE until the centre has received written confirmation from NCFE that accreditation has been awarded for the Customised Qualification

• The centre understands that their ‘qualification’, accredited as a Customised Qualification is considered by the qualification Regulators and NCFE to be unregulated provision and as such the centre will not make any verbal or written statements that would be likely to lead learners to believe the Customised Qualification is a regulated qualification

 • The centre understands that if they don’t register any learners within 2 consecutive academic years NCFE has the right to withdraw accreditation from the Customised Qualification

 • When we review your Customised Qualification we’ll look at your reasons for developing it, including why our existing NCFE regulated qualifications don’t meet your needs and we will also check if your qualification is materially different to one of NCFE’s regulated qualifications. The purpose of the materially different check is for us to be sure that your qualification is not similar to one of our regulated qualifications. We’ll check that the knowledge, skills and assessment(s) are different to any of our regulated qualifications. This helps to ensure that learners would not consider this as an NCFE owned and regulated qualification, and we’d require that you would check that your Customised Qualification is not similar to another regulated qualification. If you need any advice on this, please do not hesitate to get in touch.

• Our core purpose is to create a fairer and more inclusive society where opportunities for learning are available to all. To help with this we strongly recommend that you incorporate ED&I into your qualification(s) so that no protected groups are inadvertently excluded. You should always check that your qualification(s):

- avoid stereotypes
- actively use gender-neutral and multicultural themes and examples
- reflect and promote diversity in learning
- use a range of teaching methods/assessment methods
- materials never discriminate against anyone and are accessible to all

# Appendix 2

## Approval Criteria

To gain and maintain approval to offer Customised Qualifications you must meet the criteria detailed in the tables below. We will review the evidence in support of the centre approval criteria either on the initial approval review or on the first external quality assurance review following approval.

|  |
| --- |
|  **Management Systems and Administrative Arrangements** |

|  |  |
| --- | --- |
| **Criteria** | **Possible Sources of Evidence** |
| The centre’s aims, policies and procedures in relation to the qualification are supported by senior management and understood by the assessment team | * Documented quality procedures
* Curriculum development plans
* Organisational chart
 |
| There are procedures in place to ensure effective communication systems between all levels of staff and in all directions (including placements and staff who work remotely). | * Staff handbooks and updates
* Agendas and minutes of team meetings
* Records of emails
 |
| Staff responsibilities, authorities and accountabilities of the assessment and internal quality assurance team across all assessment sites are clearly defined, allocated and understood | * Organisational chart
* Clear lines of accountability in relation to the assessment and internal quality assurance
* Records of all assessment sites and personnel
* Staff development policy
 |
| Time will be allocated for regular team meetings and standardisation for all staff involved in the teaching, assessment and internal quality assurance of the qualification. | * Records/minutes of meetings, briefings and/or updates • Schedule of activity for staff involved in the delivery of the qualification
 |
| A staff induction and development process is in place for the assessment and internal quality assurance team. | * Induction schedule or checklist indicating policies and procedures provided to staff
* Record of meetings, briefings and/or updates
* Records of individual development plans
* Action plans to acquire the Assessor and IQA qualifications, where appropriate
 |
| There are documented policies including but not limited to appeals, complaints, health and safety, safeguarding, malpractice and plagiarism, conflicts of interest and diversity and equality | * Documented policies including appeals, complaints, health and safety, safeguarding, malpractice and plagiarism, diversity and equality, conflicts of interest
* Documented policy review mechanisms
 |

|  |
| --- |
|  Management Systems and Administrative Arrangements |
| Criteria | Possible Sources of Evidence |
| Learner records and details of achievements will be accurate, kept up to date and securely stored in line with our requirements for a minimum of 3 years and will be made available for external quality assurance reviews and auditing | * Learner registration details
* Learner assessment records
* Evidence files or portfolios
* Security and access arrangements
* Assessment outcomes
 |
| There is a process in place for withdrawing Customised Qualifications and learners from us. | * Procedure for withdrawing learners
 |
| The centre’s achievements will be evaluated and reviewed and used to inform future Customised Qualification developmental activity. | * Internal audit/self assessment arrangements
* Record of findings against the approval criteria
* Evidence of corrective actions taken
 |
| Feedback will be used to evaluate the quality and effectiveness of Customised Qualification provision against the centre’s stated aims and policies, leading to continuous improvement. | * Evaluation forms/surveys • Users charter/customer service statements
 |
| Actions identified by external quality assurance reviews will be disseminated to appropriate staff and corrective measures implemented. | * External Quality Assurer review report(s) circulated to the assessment team and senior management
* Action plans
* Minutes of team meetings
 |

|  |
| --- |
| Resources |
| Criteria | Possible Sources of Evidence |
| There are sufficient competent and knowledgeable Assessors and Internal Quality Assurers to meet the demand for assessment and internal quality assurance activities. | * Staff CVs and CPD records together with copies of relevant certificates
* A record of Assessor/learner ratios and time allocation
* Verbal confirmation from Assessors and IQAs
* List of qualified Assessors and IQAs
 |
| Assessors and Internal Quality Assurers will have sufficient time, resources and authority to perform their roles and responsibilities effectively  | * Scheme of work/lesson plans
* Sampling matrix and tracking sheets
* Learner feedback
 |
| There will be appropriate continued professional development (CPD) provision for staff involved in the delivery of the Customised Qualifications. | * Copy of your staff development plans
* Records of training undertaken such as CPD records.
* Records of meetings, briefings and/or updates
 |
| Equipment and accommodation used for the purposes of assessment comply with the requirements of relevant business legislation and Customised Qualification requirements. | * Public employee liability certificates
* Records of equipment and accommodation
* Evidence of any additional resources obtained
* Maintenance schedules
 |

|  |
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| **Assessment** |
| **criteria** | * **Possible sources of evidence**
 |
| There is a planned programme of delivery and assessment methods available for Customised Qualifications which meets our guidelines. | * Schedule for Customised Qualification delivery, teaching plans
* Assessment plans and learner assessment records
* Provision for learners with particular assessment requirements
* Records of assessment team meetings
* Internal quality assurance plans and schedules of activity
 |
| Information, advice and guidance about Customised Qualification procedures and practices will be provided to learners and potential learners. | * Learner guidance and induction materials
* Details of support services available
* Appeals and complaints procedures
* Verbal confirmation by learners, if available
 |
| Learners’ development needs will be matched against the requirements of the Customised Qualification and an agreed individual assessment plan established  | * Learner initial assessment procedures
* Learner assessment plans
* Learner/trainee contracts
 |
| Learners will have regular opportunities to review their progress and goals and to revise their assessment plan accordingly to meet their target Customised qualification | * Learner assessment plan, frequency of review meeting, examples of revisions to assessment plans
* Learner record
* System to track learners’ progress
 |
| Assessment methods will be valid and reliable and will allow access to assessment for learners. | * Assessment plans and learner assessment records
* Provision for learners with particular assessment requirements
* Access and fair assessment policy
 |
| Learners will receive regular verbal and written feedback after assessment. | * Assessment plans and learner assessment records
* Evidence files or portfolios
 |
| Assessment records are in place which will show accurate assessment tracking, progress and achievement. | * Learner assessment records
* System to track learners’ progress and assessment outcomes
 |
| Adequate procedures exist to ensure secure and safe storage of current and completed learner assessment records and examination materials. | * Details of the security and access arrangements for the storage of current and completed learners assessment records and examination materials
 |

|  |
| --- |
| **Internal quality assurance** |
| **criteria** | **Possible sources of evidence** |
| An appropriate IQA strategy and sampling plan is in place which will be reviewed regularly and corrective measures implemented. | * IQA plans and reports
* A sampling strategy and schedule of activity
* Records/minutes of assessment team meetings
* Internal reviews of sampling strategies • External Quality Assurer reports
* Evidence of corrective actions taken
 |
| Suitable arrangements are in place to ensure adequate liaison, consistency and standardisation will take place across all sites including satellite centres. | * Documented quality assurance procedures Schedule for standardisation between satellite centres
* Records of all satellite sites and personnel
 |
| Allocation of Assessor responsibilities are clear and will meet the needs of learners and Assessors. | * Organisational chart
* Records of all assessment sites and personnel
* CVs of the assessment team
* Signed agreements indicating the lines of accountability for partner organisations in relation to the management of assessment
 |
| Assessors will be provided with accurate advice and support to enable them to identify and meet their training and development needs. | * Individual development plans for the assessment team
* Records of meetings, briefings or updates
* Action plans to acquire the Assessor and IQA qualifications, where appropriate
 |
| Internal quality assurance procedures and activities are clearly documented, consistent with national requirements and will ensure the quality and consistency of assessment. | * IQA plans and reports
* A sampling strategy and schedule of activity
* Records of assessment team meetings • Assessor networking opportunities
 |
| Records of internal quality assurance activity will be maintained in line with our requirements and will be made available for the purposes of auditing. | * Internal quality assurance plans and sampling records
* Minutes of assessment team meetings
 |
| Adequate time will be allocated to allow for internal quality assurance duties to take place. | * Schedules/plans for internal quality assurance activities
* Records/minutes of IQA meetings
 |

**Appendix 3**

# Appendix 3

# Appendix 3

## Branding Guidelines

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