

## PEB Final Diploma Implementation Plan for IPReg Accreditation Requirements

Version 2 Updated 16 June 2023

Red text Update since 29 March 2023  Action Completed

Assessors' Requirements (Assessors noted that 1 – 16 relate to Appendix 1 of Assessor Report Candidate Feedback)	Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
1. Review role of External Examiner(s) to ensure fully involved in the assurance of standards, maintenance and enhancement of the quality of the assessment experience	<p>Link to Requirement 18.</p> <p>Current EE is contracted to end of 2022 session. Role to be reviewed before 2023 session.</p> <p>GB member to review the External Examiner role specification and benchmark to QAA requirements and June GB meeting to consider paper on the role of the External examiner, including:</p> <ul style="list-style-type: none"> <li>how External Examiner and Chief Examiner roles relate</li> <li>whether External Examiner should be invited to attend future GB meetings for relevant items.</li> </ul> <p>PEB to draft External Examiner Instructions/ Guidance setting out role and responsibilities of External Examiner for consideration at September 2023 GB and implementation</p>	<p>October 2023 examination session</p> <p>June 2023 GB meeting</p> <p>March 2024</p>	<p>Amendment has been made to 2023 Setting Instructions, Para 6.1 Monitoring the Quality of Question Papers and Mark Schemes, to include statement about the EE's role in production of question papers and mark schemes.</p> <p>External Examiner report form has been amended to clarify the requirement to report on comparability of standards with reference to Level 7 and HE institutions.</p> <p>GB 044 2b External Examiner Role was considered at June 2023 GB meeting.</p> <p>Previous EE cannot continue in role. Recruitment process will use amended examiner role requirements and Procedure for Selection and</p>	Project 7	N/a

		at 2023 Standardisation meetings. Setting Instructions and External Examiner Report Form to be reviewed again before the 2024 session.		Appointment approved at the June 2023 GB meeting.		
--	--	---	--	---	--	--

Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
2	meetings be fully minuted. Minutes should be an official record of discussions, decisions and actions taken. Currently it is not clear what happened and what actions are taken/not taken. All minutes should note what the discussion was and how the issue was resolved whether that be an action or no action required. Need to document board/committee adherence to the proper procedures. Minutes should be starting point for next meeting and are an integral part of the QA cycle and ensuring consistency.	Link to Requirement 5. Link to Requirement 19 QA cycle: Actions: Review how discussions, decisions and actions are recorded for the following meetings:	End of 2023 assessment cycle	EE, CE and PEs were briefed at the March 2023 Examination Committee		N/a
		Governance Board	Implemented from February 2023 Special GB meeting	Action/No action decisions are now recorded. Composite Actions list is used consistently. GB 044 1d Amendments to Constitution and GB 044 1e Amendments to ToR were agreed at June 2023 GB meeting and will be finalised at September 2023 GB meeting.		
		QPEC	From 2023 QPEC meetings			
		Standardisation Additional guidance for PEs on leading standardisation to be included in 2023 Marking Instructions.	June 2023 GB meeting to review standardisation monitoring form	2023 PE contracts have been amended to specify "lead standardisation". FD1 "Review form" recording mark scheme		

	PEB to draft amended standardisation monitoring form clarifying roles of meeting participants (links to Requirement 3).	September 2023 GB meeting	amendments at Standardisation to be trialled for FD1. GB 044 2f Review of FD Monitoring form was considered at June 2023 GB meeting. Proposed changes will be finalised at September 2023 GB meeting.		
	Awarding	Implemented from March 2023 Award (2022 session)	Decisions/Actions/No Actions including individual script outcomes are recorded in meeting notes. CE now approves Awarding meeting record. Approved meeting record to be circulated to GB.		
	Examination Committee	Implemented from March 2023 EC (2022 session)	Decisions/Actions/No actions are recorded in the Minutes. Minutes are circulated to PEB GB when approved by the Chief Examiner  GB 044 1f EC Review of Terms of Reference was considered at June 2023 GB meeting and amendments made to ToR for 2023 session. EC will be consulted in post 2023 EC meeting.		
	Candidate Consultative Committee (Informals)	From June 2023 CCC	Decisions/Actions/No action recorded with effect from June 2023 meeting.		



Assessors' Requirements	Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations	
3	review roles, responsibilities etc. of each board/committee.	Action: Review the roles and responsibilities of PEB boards and committees, including separation of responsibilities, including e.g. attendance of GB chair and patent attorney members at examiners' meetings.	Completion September 2024	<p>PEB Constitution/ToR considered at March 2023 GB meeting.</p> <p>GB 044 1d Amended GB Constitution and GB 044 1e GB ToR were considered at June 2023 GB meeting. Amended versions to be finalised again at September 2023 GB meeting.</p> <p>IPReg to be advised of changes</p> <p>Annual review of GB Constitution/ToR to take place at December GB meetings</p> <p>Discussion took place at June 2023 GB meeting for further consideration at December 2023 GB</p> <p>GB 044 1f EC Review of Terms of Reference was considered at June 2023 GB meeting and amendments made to ToR. Roles/ responsibilities of External Examiner, Chief Examiner and Principal Examiners also considered.</p>		Para 3.4 – 3.7 on page 22 re PEB GB
		Governance Board	December 2023			
		FD QPECs	2024 session			
		FD Standardisation				
		FD Awarding				
FD Examination Committee						

			<p>Consultation with Examination Committees on amended ToRs to take place at EC meetings in early 2024 following 2023 examinations.</p>	
	Candidate Consultative Committee (Informals).	June 2024 CCC	To be reviewed with CCC at September 2023 meeting (i.e. when committee has been in place for two years)	

Assessors' Requirements	Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations	
4.	<p>Review role of Chief Examiner to ensure fully involved in the assurance of standards, maintenance and enhancement of the quality of the assessment experience.</p>	<p>To be considered alongside Requirement 1 (External Examiner role and 3 (roles of each board/committee).            Action: Clarify role including relationship with GB, EE and PEs.            Review and update CE contract            PEB to draft Chief Examiner Instructions/ Guidance for consideration at GB meeting in week beginning 24 July 2023 GB and for implementation at 2023 examination session.</p>	<p>PEB GB member to provide review of role at June 2023 GB.            Implementation for 2023 session</p>	<p>Role requirements in job advertisement were reviewed in January 2023 with a view to making a longer term (3 year) appointment from the 2023 examination session.            FD and FC (two) Chief Examiners separated and appointments made with effect from 1 June 2023 for three years.            GB 044 2c Review of Role of Chief Examiner and GB 044 4d Draft Procedure for Selection and Appointment of Chief Examiners were considered at June 2023 GB meeting. Selection and Appointment procedure was approved.</p>	Project 7	N/a
5.	<p>Principal Examiner discussions are fully recorded in the minutes.</p>	<p>Will be met when Requirement 2 is completed. To be implemented for:</p> <ul style="list-style-type: none"> <li>• FD QPECs</li> <li>• FD Standardisation</li> <li>• FD Award meeting</li> <li>• FD Examination Committee</li> </ul>	<p>As requirement 2 above</p>	<p>As Requirement 2 above.            GB 044 1f EC Review of Terms of Reference was considered at June 2023 GB meeting            GB 044 2f Review of FD Awarding Monitoring form was considered at June 2023 GB meeting</p>		N/a

Assessors' Requirements	Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
<p>6. PEB ensures that the - threshold standard for the qualification and learning outcomes are consistent with the relevant national qualifications framework, - assessments measure the extent to which candidates achieve the learning outcomes both at, and beyond, the threshold level, - measurement of student achievement beyond the threshold is reasonably comparable with those of other equivalent qualifications- via external examining and the use of external input (Appendix 1).</p>	<p>As part of the planned Qualification Review:</p> <ul style="list-style-type: none"> <li>design assessment model</li> <li>review syllabus content and write Learning Outcomes and assessment criteria</li> <li>review threshold standards using QAA criteria</li> <li>map Learning Outcomes against relevant national qualifications framework (IPReg report acknowledges that RQF (Regulated Qualification Framework) standards may be more relevant than QAA framework)</li> <li>update Programme Specification</li> <li>PEs produce sample assessment materials (QPS and mark schemes)</li> <li>marking examiner training</li> <li>produce assessment strategy</li> </ul> <p>External input – link to Requirement 1 External Examiner, Requirement 12 Periodic review, Requirement 17 External Expert and Requirement 19 Managing quality.</p> <ul style="list-style-type: none"> <li>Identify external experts with appropriate expertise and</li> </ul>	<p>Began February 2023 for full implementation for 2025 examination session.</p> <p>Development working groups to begin April-May 2023</p> <p>Consultation with stakeholders (CCC, CIPA and Education Committee) beginning June 2023.</p> <p>Draft syllabi for consideration at September 2023 GB.</p> <p>Approval of final syllabi and specimen assessment materials at June 2024 GB.</p> <p>Publication of new Programme Specification, syllabi and specimen assessment materials in September 2024</p> <p>Marking examiner training before 2025 examination session</p> <p>Other actions dependent on dependent on syllabi and assessment</p>	<p>GB 043 2aiii paper on Qualification design principles was approved at March 2023 GB meeting.</p> <p>GB 043 2av Draft syllabus template paper was approved March 2023 GB meeting.</p> <p>Initial consultation with EE, CE and PEs took place at the FD Examination Committee on 9 March 2023.</p> <p>March 2023 FD Examination Committee was briefed on “red flag” amendment to Minimum Pass Descriptor.</p> <p>Initial discussion of PEB’s assessment strategy took place at June 2023 GB meeting</p> <p>GB 044 4cii on use of FD Minimum Pass Descriptor in setting and marking processes was considered at June 2023 GB meeting. The GB agreed that reference to the Minimum Pass Descriptor should be made explicit in the</p>	<p>Projects 1, 4, 8</p>	<p>N/a</p>



		<p>co-opt onto PEB Governance Board</p> <p>Assessment strategy to be considered at GB meeting in week beginning 24 July 2023.</p> <p>Plan for qualification working groups to be considered at GB meeting in week beginning 24 July 2023</p>	<p>materials having been finalised.</p>	<p>External Examiner's Report form.</p> <p>Additional guidance on Level 7 and Minimum Pass Descriptor incorporated in 2023 Setting Instructions – to be reviewed again for 2024 session.</p> <p>Initial consultation with CCC on assessment took place 7 June 2023 (Item 6 on CCC agenda).</p>		
--	--	--	---	--	--	--

Assessors' Requirements	Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations	
7	<p>review the type of feedback candidates find constructive and developmental and involve relevant stakeholders in this process (Appendix 1).</p>	<p>Link to Requirement 6 Assessment</p> <p>As part of the full review of the Qualifying Examinations, liaise with stakeholders, particularly candidates, to investigate ways in which the provision of relevant and useful feedback to candidates might be enhanced.</p> <p>Consider offering candidates opportunity to pay a fee for a feedback report on marked Fail scripts</p> <p>As part of the development of the revised assessment model, format and content of mark schemes to be reviewed to make them more useful for candidates</p> <p>PEB policy on return of marked scripts to be considered once development of the new assessment model is completed.</p>	<p>Will be fully achieved when Requirements 6 and 8 are completed</p> <p>Consult CCC at June 2023 meeting.</p> <p>Consult CCC at June 2023 meeting.</p> <p>Publication of revised policy March 2025</p>	<p>EE, CE and PEs were consulted on proposal to offer feedback report at the March 2023 Examination Committees.</p> <p>Issues discussed at March 2023 PEB GB meeting.</p> <p>Candidate Consultative Committee to be consulted on options at the June 2023 meeting including possibility of them conducting research by questionnaire to candidates.</p> <p>CIPA Education Committee to be invited to comment.</p> <p>Consultation on return of marked script/ report on failed scripts proposals took place with Candidate Consultative</p>	<p>Projects, 1, 3, 4, 8</p>	<p>Mercer: Discussion at para 5.3 on page 18.</p> <p>Mercer Recommendation 12.4: "the PEB does not make available marking schedules (as occurs with the EQEs) to candidates but provides more detailed examination reports and provides train-the-trainer sessions immediately after release of the result for any FD paper; and the PEB should make it clear that, for each of papers FD2, FD3 and FD4</p>

		Further work on stakeholder engagement (including consideration of who key stakeholders are) to be considered at late 2023 GB meeting		<p>Committee on 7 June 2023 (Item 6 of CCC agenda and page 7 of Minutes. CCC to further consult candidates by survey and feed back to PEB by end July.</p> <p>Return of marked scripts and report on Fail scripts for a fee (at full economic cost) to be considered at GB September 2023 meeting (following CCC).</p> <p>Review of other professional bodies' assessment models started March 2023.</p>		and for each questions in paper FD1, the examiners are looking to see whether the answer as a whole merits a passing mark so that candidates do not concentrate on 'mark gathering'.
--	--	---	--	--	--	--

Assessors' Requirements	Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations	FOR PEB ONLY	
8	<p>a written and transparent assessment strategy (Appendix 1).</p>	<p>Link to Requirement 6 Assessment and Requirement 19 managing quality. As part of the full review of the Qualifying Examinations, following consultation with CE and PEs, produce a formal assessment strategy. Strategy to be reviewed alongside syllabi, sample question papers and sample mark schemes by September 2024 GB meeting</p>	<p>Will be fully achieved when Requirement 6 is completed.</p>	<p>Assessment strategy was discussed at June 2023 Governance Board meeting. Draft Assessment Strategy to be considered at GB meeting in week beginning 24 July 2023.</p>	<p>Projects 1, 3, 4, 8</p>	<p>Mercer Chapter 3 page 16 considered Assessment. Section 5 page 18 Final Diploma. Para 7.6 page 19. No comments or recommendations on an overarching strategy.</p>	<p>DD producing paper for June 2023. Will consult with CE and PEs. Incorporate some Setting Instructions content into Assessment Strategy document.</p>
9	<p>in future scripts are retained for accreditation and reaccreditation exercises (Appendix 1).</p>	<p>From 2022 examination session, retain archive scripts. below Pass mark, at Pass mark and just above Pass mark. NB: retention of higher marks is considered inappropriate since only Pass/Fail results are issued.</p>	<p>Script archiving for accreditation purposes was implemented from March 2023 (2022 session)</p>	<p>Doc 044 4b PEB Data Protection including provision for script retention for external regulatory (IPReg) purposes was approved at June 2023 PEB GB meeting.</p>	<p>N/a</p>		

Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
10	Assessment methods and criteria to be aligned to learning outcomes. Review and articulate a process to ensure that assessments relate directly to learning outcomes, reflect the professional qualification and ensure candidates can show the range of knowledge, skills and attributes required by the profession.	Link to Requirements 6 Assessment, Requirement 8 Assessment strategy and Requirement 19 Managing quality. Action as part of the full review of the Qualifying Examinations.	Will be fully achieved when Requirement 6 is completed.	As Requirement 6 above. Assessment strategy was discussed at June 2023 Governance Board meeting. Draft Assessment Strategy to be considered at GB meeting in week beginning 24 July 2023. Plan for qualification working groups to be considered at GB meeting in week beginning 24 July 2023.	Projects 1, 3, 4	Mercer Chapter 3 page 16 covered Assessment and Section 5 page 18 Final Diploma
11	Draft clearly articulated assessment criteria, weightings and level descriptors that can be understood by candidates and examiners involved in the assessment process to ensure assessment is reliable, consistent, fair and valid.	Link to Requirements 6 Assessment, Requirement 8 Assessment strategy and Requirement 19 Managing quality. Action as part of the full review of the Qualifying Examinations.	Will be fully achieved when Requirement 6 is completed.	As Requirement 6 above Assessment strategy was discussed at June 2023 Governance Board meeting. Draft Assessment Strategy to be considered at GB meeting in week beginning 24 July 2023. Plan for qualification working groups to be considered at GB meeting in week beginning 24 July 2023.	Projects 1, 3, 4	Mercer Chapter 3 page 16 covered Assessment and Section 5 page 18 Final Diploma

Assessors' Requirements	Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations	
12	<p>Create a process for regular review of the validity of the assessments. This process to measure how well assessments test the outcomes they claim to measure. Process to cover not just annual review but also periodic review supported by external subject specialists and external examiners.</p>	<p>Link to Requirements 6 Assessment, Requirement 8 Assessment strategy, Requirement 11 Assessment criteria and Requirement 19 Managing quality.</p> <p>Action as part of the full review of the Qualifying Examinations. Review process, including role of external specialists, to be set out in the assessment strategy (Requirement 8).</p> <p>External input – link to Requirement 1 External Examiner, Requirement 6 Qualification Review, Requirement 17 External Expert and Requirement 19 Managing quality.</p> <p>Identify external experts with appropriate expertise and co-opt onto PEB Governance Board.</p> <p>PEB to draft External Examiner Instructions/ Guidance setting out role and responsibilities of External Examiner for consideration at September 2023 GB and implementation at 2023 Standardisation meetings.</p>	<p>Will be fully achieved when Requirement 6 is completed.</p> <p>Annual review of assessment to follow the examination session i.e. June GB meeting</p>	<p>As Requirement 6 above. February 2023 Special GB meeting agreed that, when the current qualification review has been completed and starting from end March 2025, a periodic qualification and assessment review will take place every five years.</p> <p>GB 044 1d Amendment to GB Constitution to include annual review and periodic reviews of assessment was agreed at June 2023 GB meeting.</p> <p>Assessment strategy was discussed at June 2023 Governance Board meeting. Draft Assessment Strategy to be considered at GB meeting in week beginning 24 July 2023.</p>	Projects 1, 4	N/a

13	Consider variety in assessments which would help develop a range of skills and competencies and assess a range of learning styles. A variety of assessment methods would encourage integrity.	Link to Requirements 6 Assessment, Requirement 8 Assessment strategy, Requirement 11 Assessment criteria and Requirement 19 Managing quality. Action as part of the full review of the Qualifying Examinations.	Will be fully achieved when Requirement 6 is completed.	As Requirement 6 above. GB 043 2aiii paper on Qualification design principles was approved at March 2023 GB meeting. Assessment strategy was discussed at June 2023 Governance Board meeting. Draft Assessment Strategy to be considered at GB meeting in week beginning 24 July 2023. Plan for qualification working groups to be considered at GB meeting in week beginning 24 July 2023.	Projects 1, 3, 4, 8	Mercer Chapter 3 page 16 considered Assessment and Section 5 page 18 considered the Final Diploma
----	---	--	---	---	---------------------	---

Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
14	Review whether each candidate has an equal opportunity to demonstrate their achievement through the assessment process. If not consider how to communicate openly with candidates as to what prior study/experience needed.	<p>Link to Requirements 6 Assessment, Requirement 8 Assessment strategy, Requirement 11 Assessment criteria and Requirement 19 Managing quality.</p> <p>To be addressed as part of the full review of the Qualifying Examinations.</p> <p>Guidance on website to be reviewed. Note: As regards prior study/experience, PEB's Eligibility Policy is based on the qualification and work experience requirements for admission to the Register that are specified by IPReg, so limited, if any, change is possible.</p>	<p>Will be fully achieved when Requirement 6 is completed.</p> <p>Autumn 2024</p> <p>Consult CCC at June 2023 CCC meeting as to communicating study/experience requirements</p>	<p>Consultation on communication of study requirements was initiated at 7 June 2023 CCC (Item 6 on agenda and page 7 of Minutes). CCC to further consult candidates by survey and feed back to PEB by end July.</p>	Projects 3, 8	<p>Mercer Chapter 3 page 16 considered Assessment.</p> <p>Section 5 page 18 Final Diploma</p>
		<p>Review/amend prior study/experience information in FD Programme Specification and/or unit syllabi.</p>	<p>Autumn 2024</p>			
		<p>Commission external EDI expert to review assessment model and sample assessment materials before they are published.</p>	<p>June 2024</p>	<p>External expert has been identified (holds HE role approving/arranging reasonable adjustments and modifying question papers).</p>		



Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations	FOR PEB ONLY
15	Candidates need to be clearly informed of the purpose and requirements of each assessment and standards expected. They cannot do this without access to failed scripts.	<p>Link to Requirement 6 Assessment and Requirement 7 Feedback to candidates.</p> <p>To be considered with Requirement 7. Purpose and requirements of assessment will be set out in revised syllabi.</p> <p>Action under Requirement 7: GB to re-visit policy on return of marked scripts.</p> <p>GB to consider whether candidates should be able to pay a fee for a feedback report on marked Fail script. If applicable, develop procedure for and design form for report to candidate on failed script (Requirement 16).</p>	Will be fully achieved when Requirements 6 and 7 are completed.	As requirement 7. GB 044 2d Assessment Strategy to be considered at June 2023 GB meeting		Fail scripts – No comment in Mercer	

Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations	FOR PEB ONLY
16	Feedback on the assessments must explicitly relate to the stated learning outcomes and assessment criteria.	<p>Link to Requirements 6 Assessment, Requirement 8 Assessment strategy, Requirement 11 Assessment criteria and Requirement 19 Managing quality.</p> <p>As part of qualification review, review structure and presentation of mark schemes and published Examiner reports on examinations; format of Stage 2 Enquiries about Results reports to candidates. If applicable, develop procedure and design form for report to candidate on failed script (Requirement 15).</p>	Will be fully achieved when Requirement 6 is completed.	As requirement 6. GB 044 2d Assessment Strategy to be considered at June 2023 GB meeting.	Projects 1, 4	N/a	

Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
17	<p>PEB</p> <ul style="list-style-type: none"> <li>- review the ways in which they make use of external experts to contribute to their assessment practice,</li> <li>- consider what external experts they might use in future, the processes to approve and engage external experts and</li> <li>- ensure roles and responsibilities of external experts are clear and communicated to relevant stakeholders.</li> </ul>	<p>Links to Requirement 1 External Examiner and Requirement 18 Appointment of External Examiner</p> <p>External expertise – link to Requirement 1 External Examiner, Requirement 6 Qualification Review and Requirement 19 Managing quality.</p> <p>External experts are currently appointed to deliver tasks/projects as specified in their contract.</p> <p>Role of external experts to be set out in Requirement 8 Assessment Strategy</p> <p>Appointment process for external expertise to be considered alongside Requirement 18 Process for appointing External Examiner</p> <p>Identify external experts with appropriate expertise and co-opt onto PEB Governance Board.</p> <p>PEB to draft External Examiner Instructions/ Guidance setting out role and responsibilities of External Examiner for consideration at September 2023 GB and implementation at 2023 Standardisation meetings.</p>	December 2024	<p>GB 044 2b External Examiner Role was discussed at June 2023 GB meeting</p> <p>GB 044 2d Assessment Strategy to be considered at June 2023 GB meeting</p> <p>GB 044 1d PEB Constitution was reviewed at June 2023 GB meeting and will be amended to include element of externality in selection of new Governance Board members</p>		N/a

Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
18	PEB document what processes they will use to	Link to Requirements 1 External Examiner and Requirement 17 External Expert.		Current EE contracted to end of 2022 session. Role to be reviewed before new EE contracted.	Project 7	N/a
	- approve and engage external examiners,	Review Procedure for Selection and Appointment of External Examiners (last reviewed 2020)	June 2023 GB meeting	Process to broadly follow Chief Examiner recruitment and selection procedure as set out in GB 044 4d which was approved at June 2023 GB meeting.		
	- ensure that they are appropriately briefed and provided with access to necessary information,	Access to necessary information referred only to marked scripts not having been available to the EE at an earlier stage before the March 2023 Award meeting. Currently delay may be unavoidable because script availability relies on return of scripts by examiners and turnaround times at PEB contractor - unless Awarding and subsequent Results issue are significantly delayed. PEB to investigate with contractors how this might be mitigated. PEB to review instructions to examiners on return of marked scripts.	For March 2024 Award meeting	GB 044 2b External Examiner Role was considered at June 2023 GB meeting when issue of EE's access to marked scripts was discussed. PEB to draft External Examiner Instructions/ Guidance setting out role and responsibilities of External Examiner for consideration at September 2023 GB and implementation at 2023 Standardisation meetings. September 2023 GB will consider Procedure for Recruitment and Selection of External Examiners. Briefing of External Examiners will take place through formal induction process (para 14 of Draft Procedure).		

<p>- ensure nomination, approval and engagement process robust and avoids conflicts of interest,</p>	<p>PEB aims to recruit examiners via a process that supports equal opportunities (not nomination). The routine appointment process for all examiner vacancies is that the role is advertised, applications scored against the role requirements, and short-listed candidates interviewed, The 2021-2022 External Examiner was appointed by this process.</p>	<p>June 2023 GB meeting</p>	<p>Process to broadly follow Chief Examiner recruitment and selection procedure as set out in GB 044 4d which was approved at June 2023 GB meeting.</p>		
<p>- collect external examiner feedback and</p>	<p>Requirements 1 and 6 also link. EE feedback is collected through the External Examiner Report form. Review EE Report form</p>	<p>For March 2024 Award meeting (2023 session)</p>	<p>External Examiner report form has already been updated for report on 2022 session.</p>		
<p>- inform them of any changes they have made because of their feedback.</p>	<p>Review EE report form again following 2024 session. Build Action Plan and review of actions into Award meeting and Examination Committee agendas/ minutes.</p>				
	<p>Formalise process for informing EE of any changes made.</p>				

Assessors' Requirements		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
19	PEB set out - an approach to managing quality which expressly states not just that it intends to but how it intends to take account of external expertise.	Link to Requirement 1 External Examiner, Requirement 6 Assessment, Requirement 8 Assessment strategy, Requirement 11 Assessment criteria, Requirement 12 Review of assessment, Requirement 17 External Expert. Action as part of Requirement 6 the full review of the Qualifying Examinations, including Requirement 8 development of the Assessment Strategy.	March 2025	GB 044 2b External Examiner Role was discussed at June 2023 GB meeting and will be re-visited at September 2023 GB meeting. Assessment strategy was discussed at June 2023 GB meeting and will be considered in detail at a GB meeting in late July.		Managing quality – Mercer N/a. Engagement with candidates - Mercer N/a
	- how it intends to engage with candidates both individually and collectively in the development, assurance and enhancement of the quality of their assessment experience (Appendix 1).	Review and update PEB Customer Feedback Policy to include formal consultation with candidates, annual surveys and any other appropriate mechanisms. Continue to use existing processes for engagement with candidates i.e. Annual Candidate Surveys (individual engagement) and the Candidate Consultative Committee which meets twice-yearly (collective engagement). Consider how PEB representation on the CIPA Education Committee might be	CCC scheduled for June 2023 to be consulted on initial development proposals. At appropriate subsequent points in the development process, further consultation with the CCC will be undertaken. CIPA EdCom to be consulted.	Initial consultation with Candidate Consultative Committee took place on 7 June 2023 (Item 6 of CCC agenda and page 7 of Minutes. CCC to further consult candidates by survey and feed back to PEB by end July.		

		formalised and used more effectively. Ask CIPA to assist with consultation with the profession.				
--	--	--	--	--	--	--

Assessors' Recommendations		Comments/Suggested Actions	Target date	Progress	Link to PEB Operational Plan	Relevant Mercer recommendations
1	PEB actively progress the enhancement of quality assurance, external examination, listening to feedback and evolution of the FD examinations as the UK patent profession advances (Appendix 1).	Action as part of the full review of the Qualifying Examinations including response to Mercer.	Will be fully implemented when Requirements 1, 6, 7, 8, 11, 12, 17, and 19 are met.	Assessment Strategy was discussed at June 2023 GB meeting and will be considered in detail at a GB meeting in late July.	Projects 1, 3, 4, 8	N/a
2	Enhance individual feedback on examinations. Candidates need support to understand and interpret assessment criteria. This is something that PEB is ideally placed to provide. Candidates need to understand how the criteria enable the examiners to recognise differential candidate achievement. More could be made of formative assessment opportunities, feedback needs to be timely (which it is) but it must also be understandable,	Action on feedback to candidates as Requirement 7. Formative assessment: PEB was established via its Constitution as an external examining body i.e. it conducts summative assessment. External examination boards that offer candidates formative assessment risk creating conflicts of interest and undermining the integrity of the assessment process. PEB GB does not consider that it would be appropriate or feasible to introduce provision of formative assessment at this point. Nevertheless, in due course, PEB will investigate ways in which guidance to candidates can be enhanced alongside publication of revised syllabi	Will be implemented when Requirement 7 is met.	Initial discussion on feedback options took place with Candidate Consultative Committee on 7 June 2023 (Item 6 of CCC agenda and page 7 of Minutes. CCC to further consult candidates by survey and feed back to PEB by end July.  Return of marked scripts and report on Fail scripts for a fee (at full economic cost) to be considered at GB September 2023 meeting (following CCC).	Projects 1, 3, 4, 8	N/a



	constructive and help candidates achieve (Appendix 1).	and specimen assessment materials.				
--	--	------------------------------------	--	--	--	--