

# The Curriculum Management Guide

*A guide to the production and presentation of Qualifications and Modules in the OU*

## BOARD OF STUDIES: GUIDANCE ON EXTERNAL ADVISERS

This information pack has been designed to inform and guide Boards of Studies in the appointment and management of external advisers. [The UK Quality Code](#) requires higher education providers to appoint one or more external experts as advisers to provide impartial and independent scrutiny during the development, approval and review of all provision that leads to the award of credit or a qualification. This helps to ensure that standards and quality of a providers' courses cohere with the relevant national qualification frameworks, Subject Benchmark Statements, Characteristics Statements and any relevant professional or other requirement. It is therefore essential that Boards of Studies engage with the external adviser process and follow this guidance closely.

### CONTENTS

[Roles and responsibilities of an external adviser](#)

[Eligibility](#)

[Process for approval of nominations](#)

[Contract and fees](#)

[Process of appointment](#)

[Related website and document links](#)

### ROLE AND RESPONSIBILITIES OF AN EXTERNAL ADVISER

The Open University appoints external advisers for two main purposes: to avail itself of direct experience of relevant standards in other universities and comparable higher education institutions and to help inform the quality assurance process for its modules and qualifications. Boards of Studies with a professional orientation may have a professional external adviser in addition to an academic external adviser.

The key responsibilities are:

- (a) to advise the University, as appropriate, on the requirements for the Board of Studies qualification(s) and, jointly with the Board, to consider the appropriateness of the modules within its qualifications, in particular the compulsory and core optional modules and their contribution to the aims and learning outcomes of the qualification(s);
- (b) to advise on changes to existing qualifications and on the development of new qualifications within the Board of Studies. For professional external advisers this also includes the relevance of the curriculum to industry or profession, and to the development of student employability where applicable;
- (c) (Academic external advisers only) to comment on student's attainment and the effectiveness of changes to learning, teaching and assessment strategies and to advise on the classification of the degree(s) owned by the Board;

- (d) to submit a report at a key stage in the development of new qualifications, ensuring standards and quality of the programme are appropriate;
- (e) to contribute to the [Periodic Quality Review \(PQR\)](#) process by providing critical commentary to the University on the way that quality and standards are managed.<sup>1</sup>
- (f) to attend the meeting where the Quality Monitoring and Enhancement is considered by the Board of Studies and other additional meetings as requested by the Chair of the Board of Studies (not likely to exceed one or two each year). Exceptionally, the adviser may be permitted to participate in the Board’s meeting by telephone.
- (g) to contribute to the [Quality, Monitoring and Enhancement \(QME\)](#) process by annually submitting a report on the continued validity of each qualification within the Board of Studies, following the Annual Quality Review process, by 31<sup>st</sup> January. Topics to contribute on will vary depending on the type of external adviser:

<b>Academic External Adviser</b>	<b>Professional External Adviser</b>
Comment on any changes to the Board’s qualifications and modules	Comment on any changes to the Board’s qualifications and modules
Comment on the appropriate external standards, in relation to degrees awarded by other institutions	Comment on the appropriate external standards, including professional/vocational requirements
Comment on the appropriateness of the subject benchmark statements	Comment on its professional and industrial relevance
Comment on any other matters which is felt to be appropriate to the maintenance of the standards and relevance of the Board of Studies.	Comment on any other matters which is felt to be appropriate to the maintenance of the standards and relevance of the Board of Studies.
Comment on the classification profiles of students awarded the degree	

## ELIGIBILITY

External advisers should meet the following criteria:

- They should be experienced in their field and should normally be a current professor, reader or senior lecturer at a Higher Education Institution within the UK. For those qualifications with a strong vocational or professional focus an additional expert adviser may be appointed;
- They should be familiar with current developments in the field of study concerned and through this experience, be able to make national comparisons about standards;
- They should be familiar with the context for UK quality issues, including the QAA Quality Code and any relevant subject benchmarks;
- They should have understanding and experience of current practice and developments in teaching, learning and assessment in Higher Education.

<sup>1</sup> as a 6-yearly cycle, external involvement during a Periodic Quality may not be necessary for all advisers. PQR panels will however, have access to reports of external advisers and where relevant, responses to them.

When a new qualification is proposed, an external qualification assessor should be appointed to comment on the qualification proposal from an external perspective. The qualification assessor may be the same person as the external adviser to the Board of Studies, or if the subject area is outside the external adviser's expertise, may be a different person. Please refer to the guidance on the appointment of an [External Qualification Assessor](#).

### Conflicts of Interest

The following are considered to be *ineligible* for appointment as external advisers:

- **current and former** members of OU staff, including Associate Lecturers, before a lapse of **five years** from the end of their employment;<sup>2</sup>
- visiting academic staff **during and for a year after** the end of their visit;
- **all contributors** to the materials of the core modules of the qualification;
- those individuals who are **currently** external examiners or external assessors for modules/module groups contributing towards the core of any of the qualifications managed by the Board of Studies (ACQ maintain a list of current external examiner appointments – please contact [APO@open.ac.uk](mailto:APO@open.ac.uk) for more information).
- Those who have reached **the maximum term of four years** as an external adviser (including any time as an external examiner or assessor for modules managed by the Board of Studies), until a break in service of 2 years has elapsed.

Individuals who have **previously** acted as external examiners or external assessors for modules/module groups managed by the Board of Studies in question, may be appointed as an external adviser, as long as they do not exceed the overall maximum term of involvement with the Board of Studies (four years) without a break in service of at least two years.

## PROCESS FOR APPROVAL OF NOMINATIONS

The Board of Studies should use a [nomination form](#) to nominate an adviser. The nomination must be formally approved by the Teaching Committee of the academic unit responsible for the Board of Studies. The Board of Studies may delegate nomination to the Chair of the Board of Studies, and the Teaching Committee may delegate approval to an appropriate person (e.g. Chair of Teaching Committee, Associate Dean or equivalent).

Once the nomination has been formally approved, the Board of Studies should arrange for a [letter of appointment](#) to be sent, following the process below.

## CONTRACT AND FEES

The term of office of an external adviser should not extend beyond a maximum of **four years** and in practice this could be offered as two contracts of 2 years each. This allows the opportunity for both the Board of Studies and external adviser to review the arrangement mid-way, and to make a decision on whether to continue or terminate the contract. The appropriate academic unit administrator is responsible for liaising with People Services in the administration of contracts.

---

<sup>2</sup> This does not include consultants working with FutureLearn, which is a separate limited company.

Payment of external adviser fees should be made annually on receipt of completed reports. Fees are updated by People Services and are listed on their [website](#).

Payment at the top end of the scale should be reserved for complex qualifications. Duties for these Boards of Studies should be specified and an indication of the number of meetings to attend through the year should be included in the contract. The complexity of the Boards of Studies' curriculum/qualifications should be reflected in the number of external advisers appointed and the allocation of their workload.

## PROCESS OF APPOINTMENT

The UK Quality Code requires providers to ensure external advisers are given sufficient and timely evidence and training to enable them to carry out their responsibilities. Boards of Studies must follow the process of appointment to ensure external advisers are consistently supported.

1. A potential candidate is identified by the Board of Studies.
2. The Board of Studies (Teaching Manager, Chair, or whoever is deemed appropriate) sends the candidate the [External Adviser Information Pack](#) providing them with key information about the role, to help them to make an informed decision on taking up the post.
3. Once a suitable candidate has agreed, the Board of Studies sends the nomination form to the Teaching Committee Chair for approval.
4. Following approval, a [letter of appointment](#) is issued by the Faculty, along with any other key documents relevant to that particular Board of Studies. This should include (but is not limited to):
  - Information on the curriculum covered by the Board of Studies (e.g. a list of qualifications, qualification specifications, relevant papers and any other information the school considers would be useful)
  - Board of Studies: Terms of Reference
  - Board of Studies meeting dates for the academic year.

**Documentation sent should be appropriate to the external adviser's previous association with the University and should not be a substitute for personal induction meetings.**

5. On acceptance of the appointment, the Faculty raise a consultancy request to People Services and the contract is sent to the external adviser.
6. An induction meeting is arranged between the Chair of the Board of Studies and the newly appointed external adviser, ahead of their first attendance at a Board of Studies meeting. (This meeting may be through any agreed means of communication i.e. face-to-face, via Skype video call or telephone call).
7. During the induction meeting, the Chair may provide further information such as Board of Studies membership details, contact details of key people and key dates of meetings throughout the year, which may hitherto have been confidential. The meeting should provide the external adviser with an opportunity to discuss their role and responsibilities in further detail, and to ask questions.

## RELATED WEBSITE AND DOCUMENT LINKS

[Board of Studies: faculty chairs and administrators contact list](#)  
[External adviser nomination form](#)  
[External Adviser \(Academic\) Report form](#)  
[External Adviser information pack](#)  
[External Adviser \(Professional\) Report form](#)  
[Generic terms of reference](#)  
[Periodic Quality Review Homepage](#)  
[QME homepage](#)  
[Quality Monitoring and Enhancement \(QME\) report from the Board of Studies](#)  
[The Open University Qualifications Framework](#)  
[UK Quality Code: External Expertise](#)  
[UK Quality Code: Advice and guidance](#)

## DOCUMENT OWNER DETAILS

Unit/Sub Unit: Assessment, Credit and Qualifications, Academic Services/Quality Assurance and Curriculum Policy Team

<mailto:QACP-Team@open.ac.uk>

Custodian: QACP – Hannah Machin

## AUDIT DATA

Last update: Hannah Machin / November 2019(*where update includes significant changes*)

Last review/check: N/A (*where either minor or no update is made*)

Review frequency: Annually (November 2020)

Change summary: New document – supersedes Board of Studies External Adviser Overview