**Guidance for Chairs of Periodic Review and Course Validation Panels**

1. **The role**
   1. Your role is to help the Periodic Review/Validation to be carried out constructively, to guide the Panel in understanding the purpose of the event and to ensure that all areas that need to be explored are covered. In consultation with the Panel and Secretary to the Review/Validation, you will formulate the commendations, conditions and recommendations that summarise the Panel’s recommendation, and approve the final report and the department’s response to the conditions and recommendations.
   2. You will be supported by a secretary to the event, usually a Quality and Academic Development Manager, Quality Enhancement Manager, Postgraduate Research Education Manager, or a Partnerships Manager.
2. **Prior to the event**
   1. Liaise with the Quality and Academic Development team (QUAD) over the arrangements for the meeting(s), and to ensure you have the documentation and all other information you need.
   2. The QUAD (or Partnerships) team will work with the department (or Partner Institution) and Deans to structure the event to suit the department’s needs. This includes agreeing members of the Panel and agenda for the day.
   3. All Panel members will be asked to provide their initial comments on the documentation prior to the event and the Secretary will send these to you for review.
   4. It is advisable that you contact the Secretary to arrange a pre-meeting with them to talk over preparation for the event, any particular areas that may arise, how you will work together on the day, and how you will liaise with them afterwards. This is particularly useful where either the Chair or Secretary is new to Periodic Reviews at the University (or Partner Institution).
3. **Initial Panel meeting (Stage 1)**
   1. Please open the event by welcoming Panel members and asking everyone to introduce themselves.
   2. Use the Panel Secretary as a source of knowledge and consult with them to confirm that the areas to be explored during the review/validation of courses[[1]](#footnote-1) have been addressed.
   3. Outline the purpose of the event, the structure of the meetings (referring to the agenda), the role of the Panel and the range of possible outcomes of the event. Ensure that all Panel members are clear about their own and others' roles. (Further information about roles is provided in the [Periodic Review - Guidance for Panel members](https://www.essex.ac.uk/staff/academic-standards-and-quality/periodic-review-of-courses) and [new course validation guidance](https://www.essex.ac.uk/staff/academic-standards-and-quality/course-design-validation)).
   4. Set a constructive tone to encourage productive dialogue with the course team. Encourage all Panel members to participate and do not allow an individual Panel member to dominate the discussion. Steer the conversation where you feel this is needed to ensure the Panel understands when areas for discussion are within and outside the remit of the Periodic Review process.
   5. Ensure that the role of the student[[2]](#footnote-2) representative(s) on the Panel is clear, to avoid them being asked Panel questions beyond factual matters.
   6. Ensure that discussions are conducted in a manner that is easily understood by external and student Panel members, for example by avoiding excessive use of acronyms.
   7. When you open the initial closed Panel discussion, invite the external academic representative(s) to offer their views first, as they have been asked to join the Panel because of their subject expertise. An appropriate 'batting order' might be:
      * + External academic experts
        + Internal academic experts
        + Employer/professional body representative(s)
        + Student representative
        + Any other Panel members
   8. At the end of the Panel's initial discussion, summarise the main points raised and add any issues or questions of your own. This summary will form a framework for the Panel's meetings with the students and course team.
   9. Plan the discussion with the students by agreeing which Panel member will lead questioning in specific areas, noting that other Panel members are welcome and encouraged to contribute to discussions, and ensuring that the amount of time allotted to discussion of each topic aligns with its importance.
4. **Meeting with students (Stage 1)**
   1. The discussion with students is conducted informally, with all Panel members present.
   2. Ensure there is some time after the meeting with students for the Panel to discuss any fresh issues raised, queries resolved, or points of good practice mentioned that they may wish to discuss with the departmental team.
   3. Following the closed Panel discussion after the meeting with the students. The secretary will draft a summary of the key themes and questions (which will be agreed initially by the Chair and the Panel) for circulation to the department prior to Stage 2 meetings.
5. **Meeting with departmental team (Stage 2)**
   1. Before meeting the departmental team, plan the discussion by agreeing which Panel member will lead questioning in specific areas (with reference to the summary of key themes and questions from Stage 1).
   2. At the start of the meeting with the departmental team, ask all present to introduce themselves (including course team members) and set a positive tone by thanking the team for attending and giving some positive feedback from the Panel before commencing discussion of the issues.
   3. Ensure that all issues that might lead to conditions and/or recommendations are covered in the meeting with the departmental team, so that any conditions and/or recommendations do not come as a surprise at the end of the event.
6. **Final Panel discussion and agreement over the outcome (End of Stage 2)**
   1. Discuss the outcomes of the departmental team meeting with Panel members, summarising those issues where a satisfactory response was given, noting any queries that were not fully resolved and agreeing any points of good practice that emerged during discussion.
   2. Ensure that the Panel are satisfied that they have no concerns under any areas listed in the areas to be explored which have not been discussed at the event itself. It is important that the report summarising the event confirms that all areas have been considered, so the Panel should be satisfied that any areas not explicitly discussed at the event have been covered in the documentation provided.
   3. Remember to agree the deadline by which the department should respond to conditions and recommendations.
   4. Please refer to the agenda for the areas Chairs should discuss with the Panel before finalising the Panel’s recommendation.
   5. In reaching a decision to recommend the course(s) to be validated by the University, the Panel should be asked to confirm that it has confidence in the following (which are also listed on the agenda):

* The continuing validity and relevance of the stated aims and intended learning outcomes of the course(s), in accordance with relevant internal and external reference points (please see guidance notes for panel members for further information regarding internal and external reference points).
* That the award(s) conferred by the University are of an equivalent standard to comparable awards throughout the UK, and that UK threshold standards are being achieved.
* The quality of the learning opportunities provided to students.
* That all areas which should be explored during the review/new course approval were covered in discussion during the event or were sufficiently covered in the documentation.

1. **Conclusion**
   1. At the conclusion of the event, clearly state the Panel's decision and any conditions and/or recommendations to the departmental team but remind teams that the Periodic Review/Course Validation report will be the definitive record of conclusions reached and any conditions and/or recommendations set.
   2. Ensure a clear deadline (usually around 8 weeks after the meeting with the departmental team depending on the nature of the conditions) is set for the department’s response to conditions and recommendations to be submitted.
   3. After the event, agree the draft summary outcome with the Panel Secretary (ideally within a week of the event), followed by the full Periodic Review report.

**Document review information**

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1. Where this document refers to course(s), this encompasses higher and degree apprenticeships. If you require further guidance on apprenticeships, visit this [webpage](ttps://www.qaa.ac.uk/en/the-quality-code/characteristics-statements/higher-education-in-apprenticeships-characteristics-statement) and also contact the [Apprenticeships Hub](https://www.essex.ac.uk/staff/professional-services/apprenticeships-team) for further information. [↑](#footnote-ref-1)
2. Where this document refers to ‘students’, this encompasses all learners, including students undertaking flexible or part-time study, and apprentices. [↑](#footnote-ref-2)