Icon Accreditation

Specialist Advisor Handbook

Heather Doyle, October 2024

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1. **Introduction**

Thank you for agreeing to become an Icon Specialist Advisor for ACR assessments. We are very glad to have you on board!

Specialist Advisors share their field of conservation with the candidate. As such, they play an important part in the assessment process, acting as subject matter experts and advising the qualified End-Point Assessor (EPA) on matters that relate to the conservation specialism. (This may include areas such as the candidate's depth of material knowledge, appropriateness of treatments / actions, quality of practical work etc.)

Specialist Advisors are volunteers, receiving an honorarium of £150 for every assessment they participate in. If the Specialist Advisor is required to travel to an in-person assessment, they will also receive expenses to cover reasonable travel and subsistence costs.

Essentials for a Specialist Advisor

- Must be an accredited member of Icon
- Must have detailed knowledge of the Icon Professional Standards
- Must be committed to maintaining your CPD
- Must have an understanding of the cultural heritage conservation profession, and have specialist knowledge of at least one area of conservation practice:
- Ability to understand and respond to the individual needs and circumstances of candidates
- Ability to undertake role free from bias.
- Ability to work collaboratively and supportively with others
- Ability to assess and report risks.
- Ability to meet deadlines.

Main Duties and Responsibilities:

1. Advise Assessors on the suitability of evidence presented by candidates where it relates to your specialist field of conservation.
2. Advise Assessors on the performance of candidates where it relates to your specialist field of conservation.
3. Measure candidates against the Icon Professional Standards using the Icon ACR assessment criteria.
4. Adhere to the VARCS principles when reviewing evidence: (Valid, Authentic, Reliable, Current and Sufficient.)
5. Report all risks and issues encountered during the end-point assessment to the Accreditation Manager, including any suspected malpractice/maladministration.
6. Support the Assessor, Icon Accreditation Manager and Icon Moderation Committee with any appeals from candidates regarding assessment decisions.
7. Liaise effectively with candidates, Assessors and the Icon Accreditation Manager in relation to any practical arrangements for assessment.
8. Raise any conflicts of interest, including those that may impact the independence of the assessment.
9. Take part in regular training, standardisation and performance monitoring activities, as required for the role of Specialist Advisor for Icon accreditation.
10. Maintain and provide evidence of ongoing, relevant Continuous Professional Development (CPD)

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11. Conduct oneself professionally in all dealings with assessment stakeholders including, but not limited to, candidates, Specialist Advisors, Icon Skills Team and the Icon Moderation Committee.
12. When visiting candidates in their place of work, follow all workplace protocols including, but not limited to, health and safety and workplace confidentiality.

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2. <u>Recent Changes to the Assessment Process.</u>

Why Change was Necessary.

The current assessment process is different to the one you experienced when you were accredited.

Change was necessary because the old system proved problematic for many candidates and, as a result, the numbers coming forward for accreditation were dwindling. A 2022 survey of Associate, Pathway and recently Accredited Members indicated a number of weaknesses with the old system:

- The application form was lengthy and complicated. As such, candidates often spent as long on completing the application form as they did on their assessment. Since the initial application didn't actually form part of the materials assessed, this felt like a wasted effort on the part of the candidate.
- The assessment timelines were very inflexible, and this made it difficult for candidates to manage assessment around other commitments – such as work and family.
- The process didn't adequately support candidates with disabilities and chronic health conditions.
- Although candidates understood they were being assessed on the standards, at times candidates still found it challenging to understand *exactly* what they needed to do to meet each standard.
- The assessment discussion itself was arduous and exhausting for all parties. And could be challenging for assessors to assess 37sub- standards in one sitting.

The New System

To address these issues Icon has implemented the following changes to the system.

- A shorter application form that relies less on long project summaries.
- More flexible timelines. There are now 3 application deadlines each year, instead of two, so candidates don't have to wait as long before submitting their application.
- The assessment process itself is now split into 2 phases:
  - ❖ an e-portfolio stage, where candidates provide project summaries and supporting documentary evidence, such as conservation records.
  - ❖ A half-day assessment discussion to discuss some areas of their practice in greater depth.

  Once candidates have been enrolled onto the e-portfolio software system, they have up to 12 months to complete both stages of the assessment. Candidates can work on this at their own pace, they may wish to complete everything within a couple of months or take the entire year. This flexibility enables candidates to balance their assessment workloads with other commitments.

- There is a Fair Access Policy that outlines a process for supporting candidates with disabilities and chronic / long term health conditions. Candidates can apply for

reasonable adjustments to ensure they are not disadvantaged in the assessment process.

- A new ACR Assessment Criteria has been produced and shared with candidates and assessors. This document explains what candidates are required to demonstrate to pass each standard.
- As candidates will have already shared a great deal of contextual information with assessors in their e-portfolio, the final assessment discussion does not need to be as lengthy as under the old system. The assessment discussion is now approximately 3-3.5 hours in length.

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Assessment Process Chart – who does what and when?

	Candidate	Icon Team	End-Point Assessor (EPA)	Specialist Advisor (SA)	Moderators
Portfolio Creation	Candidate writes project summaries, attaches documentary evidence and links to standards.	Available to support candidate as required			
Portfolio submission	Candidate emails Icon when complete	Icon does a portfolio 'sense-check'. Icon appoints assessors and provides reasonable adjustment information, if relevant.	EPA asked if they are available to assess. Please give response ASAP.	SA asked if they are available to assess. Please give response ASAP.	
Portfolio Review	May need to make some further amendments at request of assessors	Available to support candidate and assessors as required	Reads e-portfolio. Using assessment criteria, identifies areas of strength and areas requiring further discussion. Meets with SA to share views. Agree feedback to candidate. Contacts candidate with feedback. May ask candidate to make further amendments before discussion. Also highlights areas for discussion. If serious concerns about candidate, contact Icon	Reads e-portfolio. Using assessment criteria, identifies areas of strength and areas requiring further discussion. Meets with EPA to share views. Agree feedback to candidate.	

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	Candidate	Icon Team	End Point Assessor (EPA)	Specialist Advisor (SA)	Moderators
Pre-discussion	Candidate makes minor amendments to portfolio if required. Candidate works with mentor to prepare for discussion.	Agree discussion format and set up Zoom access for the discussion, if required.	Contacts SA and candidate to agree discussion date and preferred format of discussion with all parties. Organises access to Icon Zoom account if required. If face-to-face discussion is necessary, discuss with Icon	Liaises with EPA to agree discussion date and preferred format	
Assessment Discussion	Candidate gives brief intro to projects and then responds to questioning. May present an object or a workspace if appropriate		EPA and SA question the candidate. EPA responsible for ensuring all areas of questioning required are covered.	EPA and SA question candidate. SA leads on questions relating to material knowledge / treatment methods and looks at quality of work completed.	
Post-discussion	Provides any follow up evidence within a few days.	Icon available to support candidate and assessors as required.	EPA can ask for any follow up evidence within a few days, if required. EPA and SA meet to discuss candidate performance and agree results. EPA takes guidance on specialist terminology for report from SA if necessary.	EPA and SA meet to discuss candidate performance and agree results. SA gives guidance on subject-specific terminology for report where required.	
Report-writing		Icon available to support assessors as required.	EPA writes report and shares draft with SA to check both parties are in agreement	SA reads draft report and gives feedback to EPA.	
Report Submission		Icon sends claim form to SA and processes returns	Report submitted on Onefile. Sends invoice to icon.	SA completes claim form and returns to Icon.	

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	Candidate	Icon Team	End-Point Assessor (EPA)	Specialist Advisor (SA)	Moderators
Moderation		3 times a year, Icon assigns reports to moderators. Collates feedback from Moderators. Issues result to candidate.	Responds to any questions from moderators about report.	Rarely may be called upon by EPA to provide further information for an assessment decision.	Check that the process has been conducted fairly. Check there is clear rationale to support the assessment decisions made by EPA and SA. Where clear rationale is not present, clarify details with EPA. Uphold result or reject assessment report.

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3. Before an Assessment

Receiving an Assessment Request

Assessments can crop up at any point in the year. The number of assessments a Specialist Advisor may be offered can vary due to factors such as:

- Popularity of their conservation specialism
- Scarcity of Icon Specialist Advisors within that specialism
- Geographical location.
- The specifics of a candidate's particular projects.

Icon will approach Specialist Advisors directly, by phone and/or email, to enquire if they have the capacity to participate in an assessment. To avoid delays in assigning assessors to a candidate, please respond to the request as soon as possible. Although you receive an honorarium for your time and trouble, Specialist Advisors are classed as volunteers and it's perfectly acceptable to decline a request if you do not have capacity.

Once you have accepted an assessment, Icon will connect you with your End Point Assessor who will lead the assessment process.

Conflict of Interest

To ensure fairness and objectivity in the assessment process, it is important that there are no conflicts of interest between candidates and their assessors. Icon classes a conflict of interest as:

- A personal relationship, such as a family member or close friend.
- A current or former employer / employee / manager / co-worker from within the last 5 years.
- A direct competitor
- Any other circumstance where the assessors may benefit from the outcome of an assessment.

When accepting an assessment, End-Point Assessors and Specialist Advisors must confirm with Icon, at the start of the process, that they have no conflict of interest with the candidate.

Icon's Accreditation Conflict of Interest Policy can be found here: Icon Accreditation Conflict of Interest Policy

Timelines

If you accept the assessment, you will be given access to the candidate's Onefile e-portfolio so you can read project summaries and view associated paperwork, such as treatment records. We request you review this paperwork within 1 month of gaining e-portfolio access, unless otherwise agreed. Your Lead Assessor will contact you to discuss the portfolio and arrange times for the assessment discussion.

Icon Assessment Policies

All of Icon's Assessment Policies can be found on the website here:

Policies and Procedures (icon.org.uk)

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Whilst we do not expect you to know these policies by heart, it is a good idea to familiarize yourself with them prior to undertaking an assessment. Policies do not just apply to candidates but to all stakeholders in the accreditation process including Assessors, Specialist Advisors, Mentors and Icon staff.

These policies are as follows:

- **Accreditation Appeals and Complaints Policy –** this outlines the process for dealing with complaints and managing candidate appeals within the Icon Accreditation assessment process.
- **Icon Fair Access Policy** – this outlines the process by which Icon facilitates access to Icon Accreditation for those candidates eligible for reasonable adjustments or special consideration in assessments, without compromising the assessment of the skills, knowledge, understanding or competence being measured.
- **Icon Accreditation Quality Assurance Policy -** This Policy details Icon's responsibilities in relation to ensuring high quality, consistent and reliable Icon Accreditation assessments.
- **Icon Accreditation Malpractice and Maladministration Policy** - This Policy details Icon's approach towards managing suspected malpractice in the delivery of Icon Accreditation and the responsibility of stakeholders involved. Supporting this policy is also an Icon statement on *Plagiarism, Collusion and Cheating*, which you can find in the 'resources' section on OneFile and also in the reference section at the back of this booklet.

Reasonable Adjustments

A disability, long-term health condition or neurodiverse learning condition (such as dyslexia) should **not** be a barrier to assessment. Candidates are being assessed on their ability to meet the accreditation standards, not on their ability to complete a form or deliver a presentation.

If a candidate has a disability or health condition that might entitle them to reasonable adjustments, they are encouraged to discuss this with Icon at the point of **starting** the e-portfolio. The Icon Fair Access policy provides information on requesting reasonable adjustments. This policy can be found in the resources section of Onefile and can also be found at the Icon website here: Policies and Procedures (icon.org.uk)

If a candidate has declared eligibility for reasonable adjustments prior to assessment commencing, Icon will have agreed what reasonable adjustments must be in place and will confirm arrangements with End Point Assessor and Specialist Advisor at the start of the assessment process. To ensure fairness, it is important that the End-Point Assessor and Specialist Advisor follow any instructions given by Icon regarding reasonable adjustments.

If eligibility for reasonable adjustments is only declared once assessment is underway, the End Point Assessor should contact Icon for guidance before continuing.

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4. __What Am I Looking for When Assessing?__

To be successful at assessment, candidates need to be deemed proficient in each of the 37 sub-standards that make up the Icon Professional Standards.

ACR Assessment Criteria

When assessing you should refer to the Icon ACR Assessment Criteria. You will find the Assessment Criteria in the appendix of this document. It is also available in the 'Resources' section on the Onefile e-portfolio system. The purpose of the Assessment Criteria is to ensure everyone understands exactly what candidates must demonstrate for each of the 37 sub-standards. Using this common framework, we can ensure greater consistency in ACR assessments. The Assessment Criteria document lists each sub-standard, the pass criteria for that sub-standard and suggestions for possible evidence.

The document is written to be applicable across all conservation specialisms and different contexts. Every assessment / conservation project is different – so not everything written against a specific assessment criterion will be applicable on every occasion. Assessors should use common sense when applying this document, using their judgement in each case to decide what is relevant to each candidate, project and/or context.

Standard 5: Continuing Professional Development

Standard	Description	Pass Criteria	Suggestions for Evidence
5.1	Keep yourself informed on changes in the profession as well as broader developments relevant to your work context.	Candidates should take active responsibility for their continuing professional development (CPD). They should show understanding of, and engagement with, emerging developments and research. They should be able to identify areas where further exploration is relevant to developing their practice and expertise. This includes maintaining familiarity and, where appropriate, contact with relevant bodies in the conservation / restoration field and beyond as relevant to their area of practice.	Evidence may include, but is not limited to: • Evidence of attendance at, and learning from, professional development events such as lectures, conferences, training courses etc. • Evidence of engagement with peers across the profession, through networking events, networking groups, professional forums, individual discussion, work shadowing etc. • Evidence of academic engagement – reading papers, journals, books etc. • Performance management records • Testimonials from relevant stakeholders • Completion of CPD tasks set within the e-portfolio. • Discussion with assessors

Complex Projects and Autonomous Decisions

To be able to meet the assessment criteria, candidates generally need to present *complex* conservation projects at their assessment. Icon defines complex conservation problems as those which:

- Require choices between options that lead to significantly different outcomes
- Present dilemma and value-conflicts or require significant value-judgements
- Present substantial technical problems, for instance in relation to unstable or degraded materials or the level of risk associated with treatments or strategies
- Require a deep level of practical understanding to be applied to a situation
- Require the marshalling and management of a wide range of resources.

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To be 'complex' a project should have one or more of these factors present to a high degree.

When working on these complex projects, candidates should show that they have the specialist knowledge necessary to make **effective, autonomous** decisions, only needing to draw upon the expertise of others when they are working beyond the boundaries of their knowledge.

VARCS

VARCS is an acronym used in assessing. When reviewing evidence, you should be asking yourself if it is 'VARCS' compliant. This stands for:

- **Valid**:

  Does the evidence provided actually relate to the assessment criteria?

  E.g. If they are trying to demonstrate the quality of their hand-skills, is there visual evidence for you to view either through photographs, video or live presentation of an object? If they are trying to demonstrate adherence to health and safety procedures, is there relevant documentation such as risk assessments and COSHH paperwork etc?

  Occasionally, you may feel the candidate has misunderstood the nature of an assessment criterion. If so, discuss this with the End-Point Assessor.

- **Authentic:**

  To the best of your knowledge, does the evidence appear to be the candidate's own work? If they are drawing upon the work of others, such as colleagues or published work, is this properly acknowledged / cited?

  (We just ask for your best judgement, based on what you read, see, discuss and observe. We do not expect you to be clairvoyant!)

- **Reliable**:

  Is the portfolio an accurate reflection of the candidate's standard of work. For instance, if they are providing 3 sets of treatment records, are they all of similar quality or is the quality inconsistent?

- **Current:**

  Is the knowledge up to date? (There's a caveat here, candidates may draw on older projects, particularly if their projects are large in scope and take many months to complete. However, if new knowledge has emerged since the project was originally completed, and best practice approaches have changed over time, the candidate must show awareness of this, and discuss how they might undertake the project differently today. Basically, the projects can be old, but the specialist knowledge must be current.)

- **Sufficient:**

  Is there enough evidence to make an assessment decision?

  This is hard to give definitive guidance on what 'sufficient' is, as the content and quality of every portfolio is different.

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Some standards required the candidate to demonstrate a particular standard of work - (e.g. in most standards 1-3, where you might expect to see condition assessments, treatment records etc. Or standards covering issues such as health and safety.) For these standards we are looking for **consistency of approach** and consequently we recommend candidates evidence each standard 2-3 times.

Other standards may be more knowledge-based or refer to more minor aspects of a conservator's day to day role. For instance, sub-standards regarding environmental sustainability, or sharing conservation knowledge with expert and lay audiences. For these standards 1-2 examples may be sufficient.

Much depends on the <u>quality</u> of evidence and <u>how well it suits the standard</u>. This is where we must trust your judgement. Use the assessment criteria for guidance and ask yourself 'if this person was working for me, would I feel confident in their ability?'

Holistic Assessment

By the end of both stages of the assessment, candidates should have demonstrated that they have met all of the criteria somewhere.

Candidates do not necessarily have to meet each criterion in both assessment <u>and</u> discussion. (You will find some assessment criteria lend themselves more naturally to discussion, whilst others are proved sufficiently through written evidence.)

Nor do candidates have to meet each criterion in every project. Perfect projects that meet all 37 criteria rarely exist!

Assessors need to be clear *where* a candidate has met a criterion (e.g. which project) and be able to give a rationale for the final assessment decision.
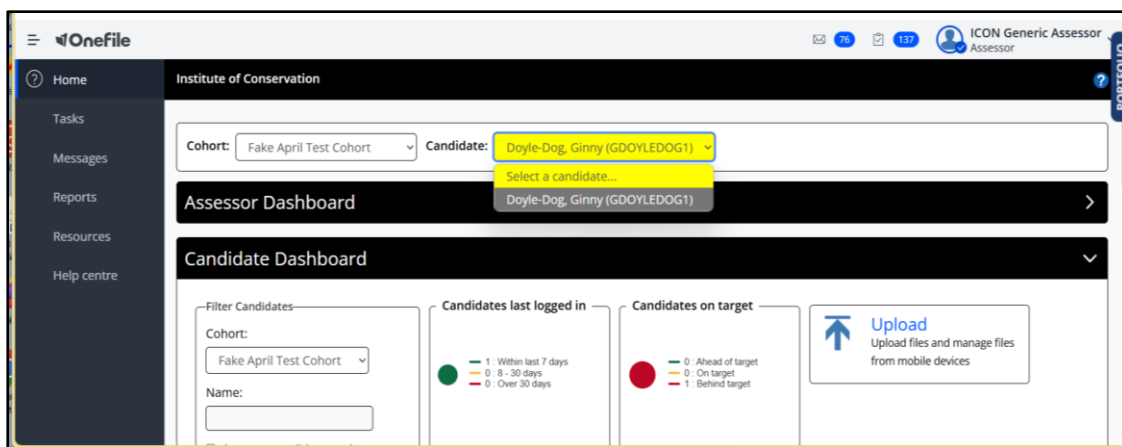
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5. **During the Assessment: E-portfolio stage**

Accessing the E-portfolio on Onefile

Candidates produce their e-portfolio using a software system called Onefile.

Once you have confirmed you are happy to participate in the assessment, Icon will set up a Onefile account for you. You will then receive an email from Onefile inviting you to set up a password. (The link in this email expires after 7 days. If you find the link has already expired by the time you get to it, contact Icon and we will get the Onefile system to send you a new link.)

When you log into Onefile you will see a screen like the one below. If you click inside the candidate box where it says, 'select a candidate', you will see any candidate(s) you are assigned to. Click on the correct name and scroll down the page where you will see their account highlighted in yellow.

Once you have the candidate's information on the screen, you have two different ways of viewing their information, either organised by **project** or by **sub-standard**.

a) To view by **project,** do the following:

Click on the black button labelled 'Assessments', this will bring you to a page where all their projects are listed. See example below.

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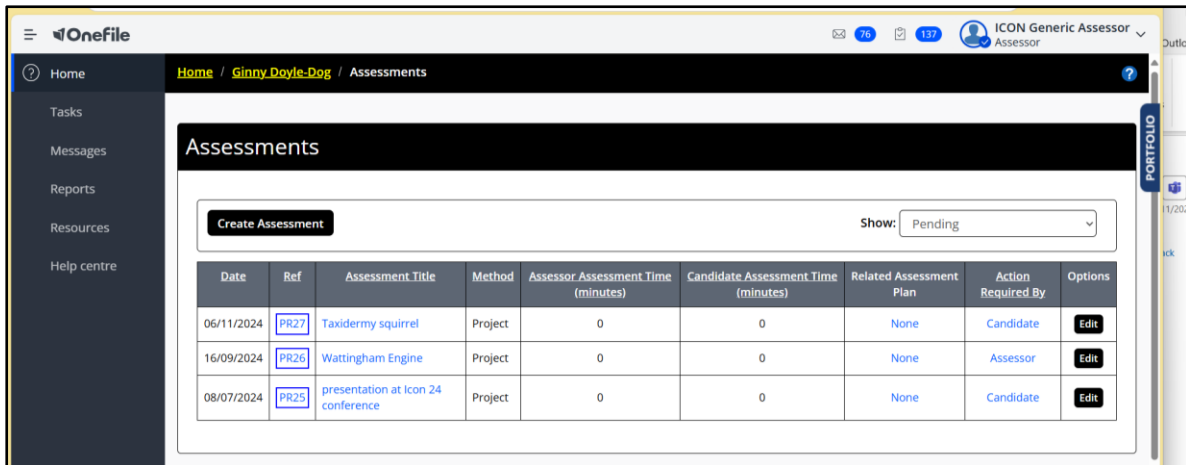
Click on the link in the 'Assessment Title' column to view the project.

When viewing a project, you should be able to see the following information (see example screen shots below):

- A list of the standards they are trying to evidence in this project.
- A write-up giving contextual information about the project, why it was complex and the role they played.
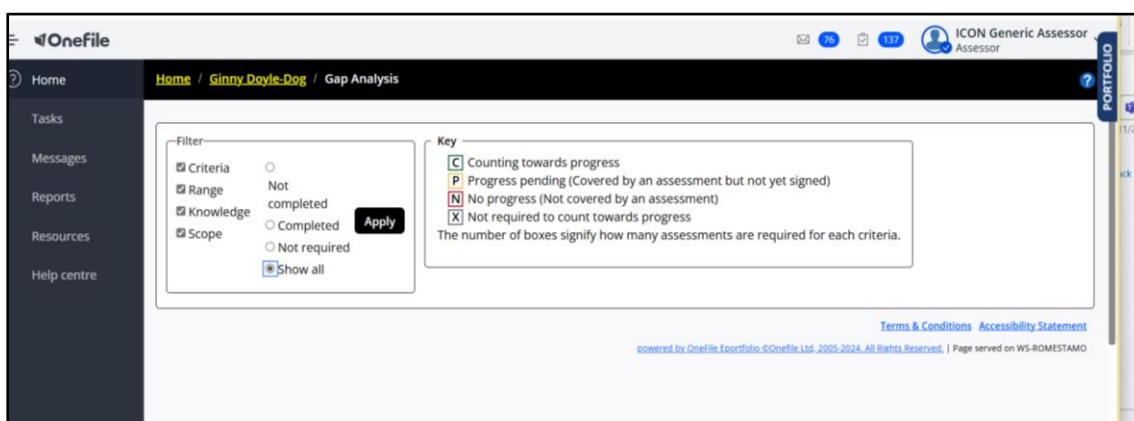- Relevant attached documentation

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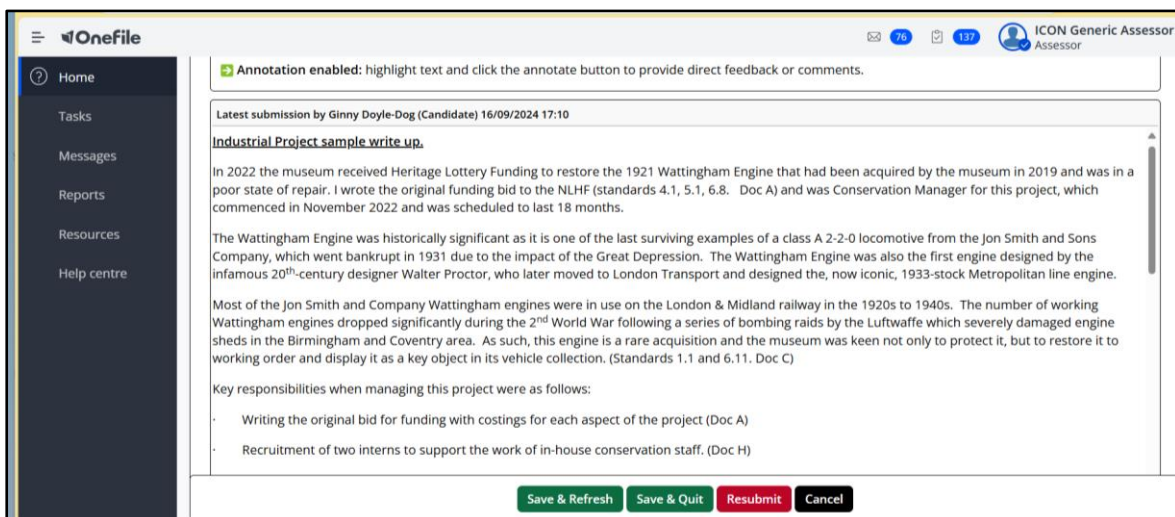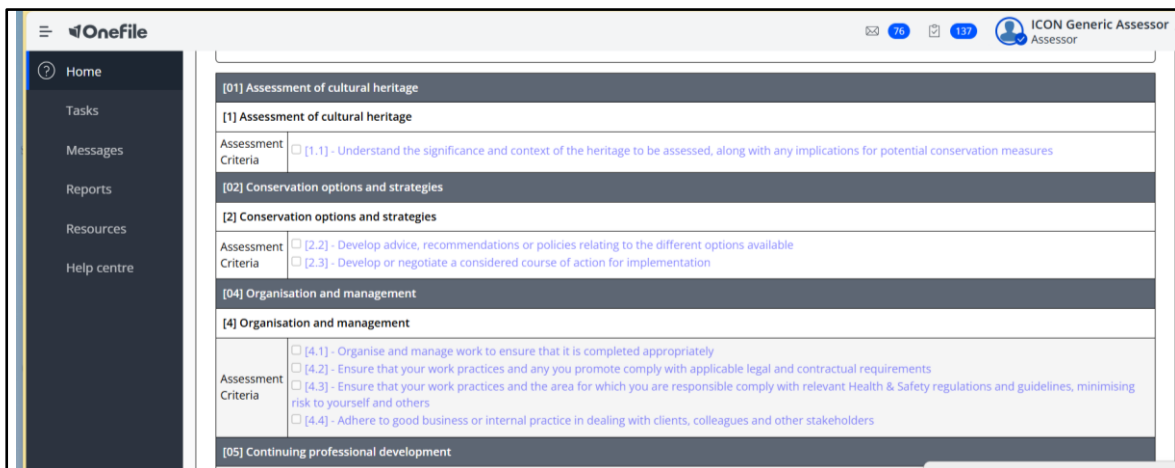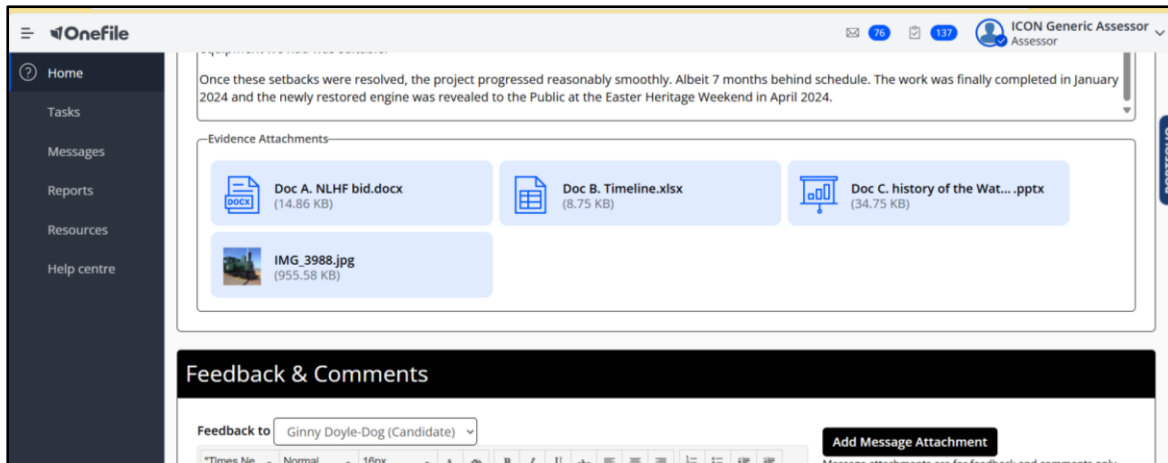
Important note: opening a file puts a copy in your downloads file on your machine. Do remember to delete it after viewing!

    b)   to view candidate's work by **sub-standard,** do the following
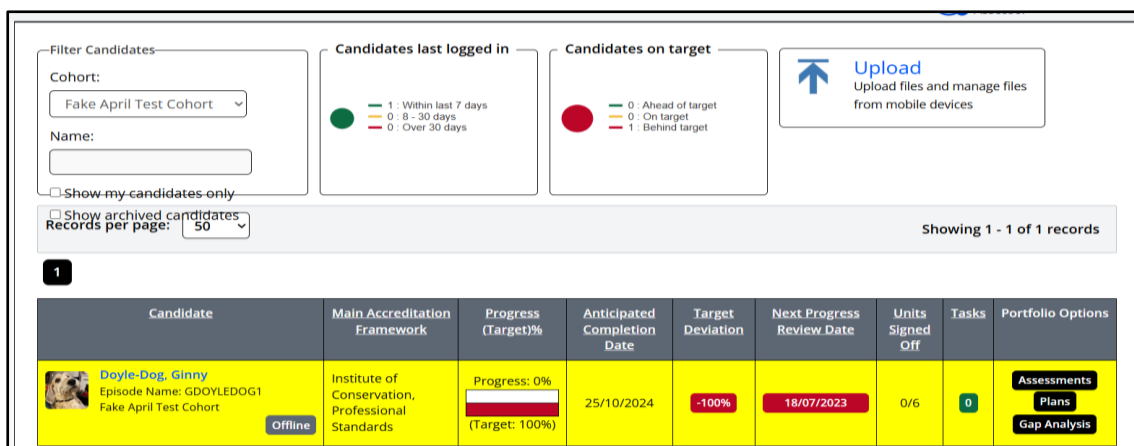
Click the black button called 'gap analysis'. This will bring up the screen below.

In the filter section, click 'show all' and then click the black 'apply' button.

This will then take you to a screen that has drop down menus of all 6 areas of the Professional Standards

Standard 1: Assessment of Cultural Heritage.

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Standard 2: Conservation Options and Strategies

Standard 3: Conservation Measures

Standard 4: Organisation and Management

Standard 5: Continuing Professional Development

Standard 6: Judgement and Ethics.

Click on the drop-down arrow on each standard to see a listing of the sub-standards. In the example below we are looking at the candidate's evidence for Standard 3. The candidate has got evidence listed against sub-standards 3.2 and 3.3 (the blue hyperlinks in the 'Supporting Evidence column.) However, there is no evidence listed for sub-standards 3.1, 3.4, 3.5 and 3.6.

If you click on any of the blue hyperlinks, it will take you directly to the relevant project for that sub-standard.

Resources on Onefile

The 'resources' section on Onefile can be located by clicking 'resources' in the black menu to the left of the screen.

In the resources section you can find the ACR assessment criteria, Icon's assessment policies, the Plagiarism, Collusion and Cheating statement and this guide.

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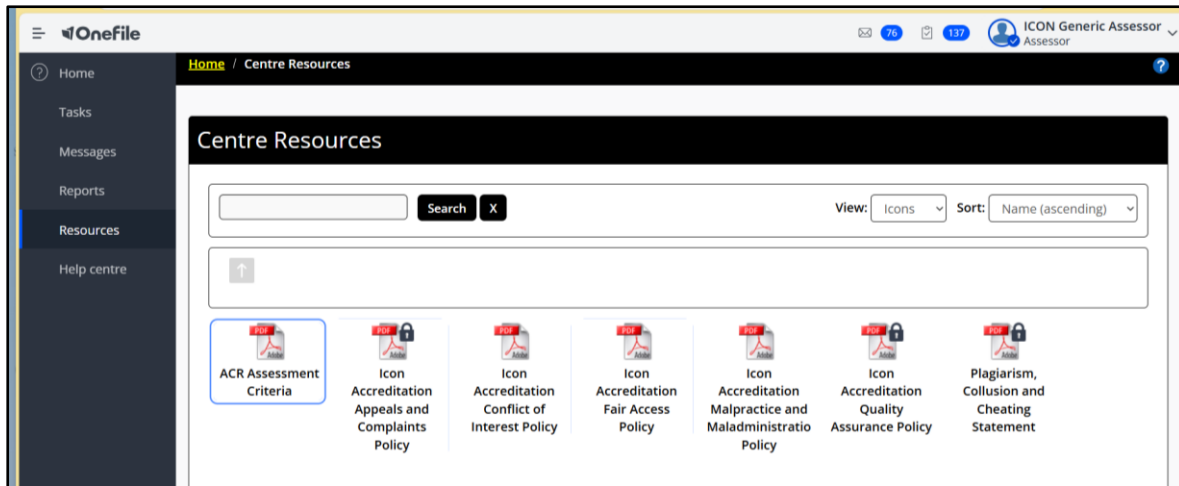
Reviewing the Portfolio

When reviewing candidate's e-portfolio evidence – we recommend you make any notes offline initially (e.g. in a word document) and share this with your End-Point Assessor. Don't use the feedback box in the system – as this is only used for final post-assessment feedback at the end of the process. And it will be the End-Point Assessor who enters the information.

When reviewing the information provided use the ACR Assessment Criteria and the VARCS principles as your guide. Ask yourself the following:

- Are there any standards you feel are fully met in the portfolio and don't need discussing further at discussion? (Standards that relate to record keeping and formal paperwork can often be successfully met at this stage.)
- Are there any standards that are partially met but require further discussion at the next stage? What are you looking for at the discussion stage to be fully satisfied?
- Are there any specific aspects of a project you would like to understand in more detail at the next stage?
- Are there any standards not addressed and require the candidate to make amendments to the portfolio before proceeding? (E.g. has a candidate completely misunderstood a standard?)

Once you have considered these questions, arrange a time to share thoughts with the End-Point Assessor. Are you in agreement? Remember: the End-Point Assessor does not come from your conservation specialism, so if there is disagreement, you will need to provide clear rationale for your viewpoint.

Use the meeting with the End-Point Assessor to determine which areas require further exploration in a half-day professional discussion. (There is no need for you to cover standards that have been fully met at portfolio stage.) The professional discussion should be used to focus on areas that require a more nuanced conversation– e.g. this could be testing the candidate's material knowledge, discussing ethical issues, getting candidates to justify treatment decisions etc. You may also wish to see a current project the candidate is working on or get them to give you a tour of their workspace.

Once you have decided on areas of questioning and requirements for discussion stage, the End Point Assessor will give the candidate feedback to help them prepare.

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Scheduling the Discussion

Your End-Point Assessor is responsible for scheduling the assessment discussion. To ensure fairness, it is vital that all parties should be able to allocate sufficient time to the discussion and can talk freely without interruption or distraction. Be honest about your availability and only commit to timeslots that are practical for you. It is not fair to the candidate if you cannot give them your full, undivided attention during assessment.

We request that, under normal conditions, assessments take place within 6-8 weeks of portfolio review. If schedules do not align and this is not possible, please speak to your End-Point Assessor and they can discuss with Icon.

Discussions are digital by default, using platforms such as Zoom, Teams etc. However, if there is a clear reason why face-to-face is necessary – e.g. because reasonable adjustments deem it necessary or because assessors cannot understand candidate's work without a face-to-face meeting, the End Point Assessor should discuss this directly with the Icon Skills Team.

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6.   During the Assessment: Professional Discussion Stage

The assessment discussion typically lasts between 3 to 3.5 hours. Occasionally, if a candidate requires reasonable adjustments, the discussion can take place across several shorter meetings or candidates may be allowed extra time. Icon will inform you of any reasonable adjustments necessary prior to discussion.

Assessor-led Agenda

Under the old ACR assessment system, the agenda for the assessment discussion was typically more **candidate-led**. (Assessors were less familiar with the projects before assessment day and candidates would be required to give a contextual presentation for each project.)

Under the new system, assessors have already reviewed the e-portfolio and have a greater amount of information on the projects. Furthermore, they may already be satisfied that the candidate is proficient in some areas. Consequently, the agenda for the assessment discussion is much more **assessor-led.** You will already have agreed, prior to discussion, some areas you want to explore in more detail with the candidate and you should have some questions prepared. There is no requirement for candidates to rehearse and produce presentations for each project at this stage.

A Conversation between Peers

We aim for the professional discussion to be a friendly conversation between peers. It should **not** feel like a job interview or interrogation! We are trying to bring out the best in candidates and see what they know. We are not trying to catch them out. Consequently, be flexible in your approach. For instance, if a candidate remembers something and wants to circle back to a previous question, let them. If they want to quickly refer to their project documentation and check something before answering a question, that is acceptable.

Some candidates will offer information freely and the discussion will flow easily. Others may feel more nervous and wait to be asked. It's worth checking with candidates that there's nothing important they wish to add before moving the conversation in a different direction, particularly if you are not confident the evidence given thus far is sufficient.

Recording the Conversation

It's a good idea for assessors to record the conversation so they can refer back to it when deciding /reporting results. Most assessment discussions are online and held on platforms like Zoom which have a 'record' feature. However, if you are meeting in person, the End-Point Assessor may wish to record it on their mobile phone or use a Dictaphone. Sound recordings can be uploaded onto Onefile as evidence.

If you take written notes during the discussion, we request you hold onto these until after the candidate's result has been moderated by the Accreditation Moderation Committee. (Moderators may occasionally come back to assessors at moderation stage to clarify information if something is not clear.)

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7. **After Assessment**

Reporting Results.

After the discussion is completed, you will need to meet with your End-Point Assessor to discuss and agree results. Whilst the End-Point Assessor is responsible for writing the report, both assessors agree the overall assessment decisions, so you need to participate fully in this process. The meeting should be done as soon as possible after the discussion. Ideally, the End-Point Assessor should record this meeting so they can capture your views as accurately as possible. In particular, the End-Point Assessor will want your detailed input on all decisions relating to material knowledge and the suitability / quality of conservation measures – including guidance on the specialism-specific wording of text in the report.

If further evidence is needed for a specific standard, assessors have the option of going back to a candidate and seeing if there's anything further they wish to submit for review. However, this approach is only recommended if a candidate has missed a small number of standards and could be considered a borderline pass. If a candidate is regarded to have failed across a wide variety of criteria, a future reassessment will be needed.

Once the report is drafted, the End-Point Assessor will share a copy with you before submitting to Icon so you can sense check it.

If you are not in agreement with your assessor regarding candidate results, discuss your reasoning with them in the first instance and see if you can reach a consensus. If, after this, you still cannot agree on the results, contact Icon for advice.

If you have taken written notes during the assessment process, you should retain copies of these until after the moderation process is complete.

Once both parties have approved the content of the assessment report, the report will be submitted to Icon. Icon will issue interim results to the candidate. But these are unofficial results pending the moderation process. Candidates are not awarded ACR status at this stage.

Moderation

The role of the Moderation Committee is to undertake internal quality assurance for Icon accreditation assessments, ensuring the process has been carried out correctly and the assessment outcomes are fair, accurate and objective. The Committee meet three times a year to moderate new assessment reports, checking that there is a clear rationale for assessment decisions and that these decisions have been made with reference to the assessment criteria and the VARCS principles of assessment.

If moderators cannot find clear rationale for decision-making in an assessment report, they can request clarification from the assessment team. If, following this clarification, they still cannot see clear rationale behind assessment decisions, they can reject all or some of the assessment decisions, resulting in a candidate requiring reassessment.

Final Result

If moderators are satisfied with the rationale behind assessment decisions, the report is upheld, and final results are issued to candidates by Icon.

There are 3 possible outcomes for the candidate:

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Pass: Clear evidence that the candidate has passed all sub-standards at proficient level. Candidate is awarded ACR status.

Discretionary Pass: Clear evidence that the candidate has passed 36 out of 37 sub-standards at 'proficient' level. The candidate has been deemed 'competent' in 1 remaining sub-standard from either standard 1, 2, 4 or 5. (The candidate cannot be deemed 'competent' in any sub-standard from Standard 3 or Standard 6.) The Moderation Committee is satisfied that the candidate is close to achieving proficiency in the remaining sub-standard. Candidate is awarded ACR status.

Requires reassessment: Clear evidence that the candidate has either failed multiple sub-standards or a single sub-standard from Standard 3 or 6. Candidate is not awarded ACR status and will be required to undertake either full or partial reassessment to gain ACR status in the future.

When a Candidate has not Passed....

Typically, when a candidate has not achieved ACR status at first attempt, they are required to do a **partial reassessment**. This means, they are only reassessed on standards they have missed. Hence partial reassessments are shorter and quicker for assessors and candidates. Candidates will be required to pay another fee for reassessment. The exact sum depends on the scale of the reassessment and the assessor time involved. Fees are as follows.

- Reassessment of Portfolio of Evidence only: £150

- Reassessment following Professional Discussion:

  1 to 10 criteria: £200

  11 to 20 criteria: £350

  20 + criteria: £500

Claiming the honorarium and expenses.

Once the assessment report is complete and has been uploaded onto Onefile by the End-Point Assessor, you will be entitled to claim an honorarium of £150 for your effort. Icon will send you the claim form.

If your assessment discussion was in-person, rather than online, you can also claim travel expenses for mileage and petrol of 0.45p per mile (if using a car) or 2nd class travel (if using public transport). If you have to eat meals away from home, you can also claim up to £20.00 per day for subsistence. You must present electronic or paper VAT receipts for all travel and subsistence claims.

Claims are sent to our external finance team for processing and can take up to 14 days to appear in your bank account.

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8. **If You Have Problems...**

Onefile Issues

If you need any refresher / update training on Onefile prior to assessment, contact the Icon Skills Team on accreditation@icon.org.uk at the earliest opportunity and we'll schedule a time to talk things through.

If you are locked out of Onefile and need a password reset, contact Icon Skills Team and we can do this for you. **If it's urgent because there's an assessment looming, cc in Heather (heather.doyle@icon.org.uk) and/or Beck (beck.kaplan@icon.org.uk).**

If Onefile is not working correctly for you, you can contact Onefile tech support at **support@onefile.co.uk**

Concerns about a Candidate

Most of the time, if you have concerns about a candidate, you should discuss this directly with your End-Point Assessor.

However, if the concern is sensitive and/or confidential in nature – perhaps relating to the candidate's personal circumstances or an issue between the candidate and End-Point Assessor, then contact the Icon Skills Team at the email addresses above**.**

Common issues that may occur include:

- **Candidate discloses a condition that entitles them to reasonable adjustments.** Candidates are encouraged to disclose this to Icon prior to starting the assessment process. However, if a candidate discloses this during the assessment process, Assessors should pause proceedings and contact Icon.
- **Assessors review portfolio and agree candidate is not ready to proceed.** The Icon Skills team do take pains to check portfolios are fit for purpose before engaging assessors. However, we are not Conservators ourselves and occasionally a candidate slips through who is not ready. When this occurs, the End-Point Assessor should contact Icon to discuss the issues, and Icon will advise the candidate accordingly.
- **Concerns about the authenticity of candidate's evidence**. Fortunately, incidents where candidates deliberately try to mislead assessors are rare. However, vague language from candidates can make it unnecessarily confusing for the assessor. For instance, for those candidates used to working in tight-knit teams, phraseology like 'we did' rather than 'I did' can make it difficult to interpret which tasks were done by whom. Discuss this with your End-Point Assessor and they can raise this directly with the candidate.

Remember, if you have concerns about potential malpractice or maladministration by any stakeholder involved in the Icon accreditation process (including the Icon Skills Team), we have a Malpractice and Maladministration Policy in the 'resource' section of Onefile and at the Icon website at: Policies and Procedures. This document will advise you on appropriate next steps.

Heather Doyle, October 2024

9. **Finally…**

The information provided here may seem daunting at first, but don't worry! Most assessments go very smoothly and, as an ACR yourself, you will have an intuitive understanding of what good practice looks like in your field.

Icon could not run a successful accreditation programme without the dedication and passion of members such as yourself. We hope you find the role of Specialist Advisor to be a very satisfying and interesting one.

Thank you!

The Icon Skills Team.

Heather Doyle, October 2024