
External Workforce Recruitment and Deployment Policy

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1. Introduction

The British Horse Society (BHS) is committed to ensuring consistency in assessment standards. The recruitment, training and deployment of assessors, mentors and internal quality assurers is crucial in maintaining quality, fairness and consistency in assessment.

2. Scope and applicability

This policy applies to:

- All BHS Career Pathway assessments. This includes qualifications awarded by BHS and BHSQ.

This policy is for:

- Assessors, Internal Quality Assurers and Mentors
- Individuals who are interested in becoming BHS Assessors
- Candidates
- Approved assessment centres
- BHS employees
- Translators
- Others as relevant

3. Purpose and objectives

The purpose of this policy is to clearly define the criteria and process for external workforce recruitment and deployment. It also defines the process for upgrading assessors through the BHS levels and how external workforce deployment is monitored and terminated if necessary.

This document will:

- Define the roles and responsibilities of a BHS Assessor
- Define the roles and responsibilities of an Assessor Mentor
- Define the roles and responsibilities of an Internal Quality Assurer
- Define the criteria an individual must meet to become a BHS Assessor
- Outline the application process
- Outline the initial assessor training process and the requirement for Continual Professional Development
- Define the process for assessors to upgrade their status
- Explain BHS's approach to assessor deployment and risk rating
- Outline the process for ending the contract between the BHS and an assessor

It is useful to refer to the following documents and policies when reading this:

- Conflict of Interest
- Internal Quality Assurance
- BHS Education Contractor Agreement

4. Terms and definitions

Approved assessment centre is any location where a BHS assessment is taking place.

Candidate is anyone taking a BHS assessment.

Assessor is contracted to make assessment decisions at BHS assessments.

Lead Assessor is responsible for co-ordinating the assessment day with the Approved assessment centre, BHS Education Team and any co-assessors.

Probationary Assessor is an assessor who is in training. They are contracted to the BHS but are being supported to make assessment decisions until they can work as an assessor independently.

Assessor Mentor refers to an experienced Lead Assessor who has been deployed as an Assessor Mentor by the BHS to train and support assessors or probationary assessors.

An **Internal Quality Assurer (IQA)** is contracted by the BHS to carry out internal quality assurance activities.

Recruitment is the sourcing of new assessors.

Deployment is the allocation of assessors by the BHS to attend an assessment.

Upgrade refers to expanding the levels of assessments which an assessor is approved to assess.

5. BHS's approach to managing recruitment, training and deployment of external workforce

The BHS take a consistent and systematic approach to the recruitment, training and deployment of its external workforce. This is based on clearly defined criteria and a risk-rating framework.

6. Role descriptions and expectations

6.1 Assessor

A BHS Assessor is appointed by the BHS Education Team. Their roles and responsibilities include:

- Carrying out assessments on candidates in order to make effective judgements on candidate's skills, knowledge and understanding against assessment criteria.
- Following BHS policies and procedures to enable delivery of safe, fair and valid assessment.
- Maintaining health, safety, wellbeing and welfare of candidates, horses, themselves and others at assessment.
- Planning and delivering assessment activity.
- Keeping an accurate record of observations during assessment.
- Recording assessment decisions.

- Submitting assessment results digitally within 48 hours of assessment, via the process advised by the BHS Education Team.
- Providing accurate, evaluative and developmental feedback within 48 hours of assessment.
- Being responsive to communications from the BHS Education Team.
- Keeping personal CPD records up to date; this includes attending compulsory assessor CPD training delivered by BHS/BHSQ and industry relevant CPD.
- Delivering a briefing before an assessment that is informative, puts candidates at ease, encourages questions and manages their expectations of the day.
- Ensuring all candidate paperwork is completed before the assessment begins, for example Emergency Contact form, Sign in/out register, and so on.
- Following guidance in the 'Assessor Guidance' as to necessary checks and instructions to complete before assessment.
- Providing appropriate support to candidates, which includes implementing access arrangement requests.
- Keeping up to date with assessor communication and updates sent by the BHS Education Team.
- Retaining currency in First Aid, Safeguarding and Criminal Record checks as per the guidelines set by the UK Nation or country of residence they live in.
- Maintaining knowledge of current practice in equine.
- Maintaining knowledge of the BHS/BHSQ qualification specifications.

The skills and behaviours we expect BHS Assessors to uphold include:

- Excellent communicator
- Excellent time management
- Maintain consistent standards
- Approachable
- Welcoming
- Fair, making unbiased judgements with no preconceptions
- Organised
- Polite manner with all candidates, BHS assessors, BHS employees, Approved centre employees and others you may come into contact within your role as assessor
- Responsive.

6.2 Lead Assessor

In addition to the Assessor role, the Lead Assessor also has the following roles and responsibilities:

- Maintaining health and safety.
- Managing the assessment day, ensuring fair assessment and good customer service is applied.
- Managing any declarations of interest/conflicts of interest declared on the day.
- Ensuring assessors are aware of any under 18 candidates identified in the Safeguarding document.
- Checking the content of the assessment pack, both emailed version and posted, as soon as possible after arrival.
- Contacting the BHS Education Team if anything is missing from the assessment pack.

- Checking the timetable then liaising with the assessor team and Approved assessment centre lead, (and if applicable translator/s), to co-ordinate the assessment day.
- Allocating assessors to candidates.
- Managing the smooth running of the assessment.
- Managing the implementation of any approved Access Arrangement requests.
- Overseeing customer service.
- Overseeing the completion of all necessary paperwork and checks before the assessment begins.
- Supporting assessors when required.
- Communicating with any Internal Quality Assurer or External Quality Assurer at the assessment.
- Completing and returning centre feedback and reports, (including risk assessments and accident report forms) digitally within 48 hours of assessment.

6.3 Assessor Mentor

An Assessor Mentor has the following roles and responsibilities:

- Provide training, support, guidance and feedback at assessment, (this will normally be in relation to a probationary assessor who is in the process of upgrading).
- Ensuring that assessors or probationary assessors are making effective judgements on candidate's skills, knowledge and understanding against assessment criteria.
- Ensuring that assessors or probationary assessors are following BHS Policies and Procedures.
- Ensuring that assessors or probationary assessors maintain health, safety, wellbeing and welfare of candidates, horses, themselves and others at assessments.
- Reviewing candidate feedback given by the assessor or probationary assessor before it is submitted, making suggestions for any changes directly to the assessor or probationary assessor.
- Discussing performance with the assessor or probationary assessor at the end of the assessment.
- Making recommendations for the future development of the assessor or probationary assessor.
- Completing Probationary Assessor Report Form and returning to BHS Education digitally within 48 hours of the assessment.

6.4 Internal Quality Assurer (IQA)

An Internal Quality Assurer will usually be an experienced Lead Assessor but this may not always be the case where Internal Verification does not form part of the IQA activity, (for example, where the IQA activity relates solely to customer service or a BHS internal process). IQA activities may be desk-based or in-person and an Internal Quality Assurer may be asked to assess and report on the following:

- how well an assessor adheres to BHS Education Policies and Procedures
- how an assessor adheres to and samples BHS assessment criteria
- an assessor's organisation, customer service and inter-personal skills
- an assessor's presentation and professionalism
- an assessor's questioning technique
- the reliability of an assessor's assessment decisions
- the candidate feedback given by an assessor
- the impartiality of an assessment

- the suitability of the horses, equipment and facilities provided by an approved assessment centre
- the implementation of a specific process.

7. Recruitment and training of Internal Quality Assurers

Where the BHS Education Team identifies a regional or national need to recruit IQAs, it will invite assessors to apply by submitting a current CV including details of any internal verification/internal quality assurance qualifications or experience. The requirements for applicants and the recruitment process will be detailed in the application advert.

All applicants will receive confirmation regarding the outcome of their application. All Internal Quality Assurers should complete IQA training before they are deployed in an IQA capacity and will normally receive a briefing and de-brief from the BHS Education Team prior to and following their first IQA deployment.

8. Assessor recruitment

The recruitment of new assessors is BHS led based around demand for assessments, which may or may not be specific to a particular region. Any requests for recruitment of assessors must be authorised by the Director of Education.

When the BHS determines a requirement to recruit assessors, a recruitment advertisement will be placed on BHS platforms such as the BHS website, Accredited Professional e-news and Approved Centre e-news.

The BHS will provide guidance for the qualifications, skills and experience requirements for applicants. The BHS may keep the application window open for as long as the application deadline date or until the maximum number of applications has been received, whichever is sooner.

All applicants will be asked to complete an Equal Opportunities Monitoring Form and all those invited to interview will be required to show their eligibility to work in the country in which they will be deployed. Applicants will also be asked to show the status of their driving license.

Applications will be screened for suitability by a small group of BHS Education Team employees based on the essential criteria for the role. Assessment for suitability may include a telephone conversation or video conference prior to an invitation to attend an interview, in addition to an interview. The interview panel will be selected by the Director of Education. Following a successful interview, applicants will be invited for initial assessor training.

If no applications are deemed suitable by the BHS, the BHS reserve the right to extend the application window and begin recruitment again.

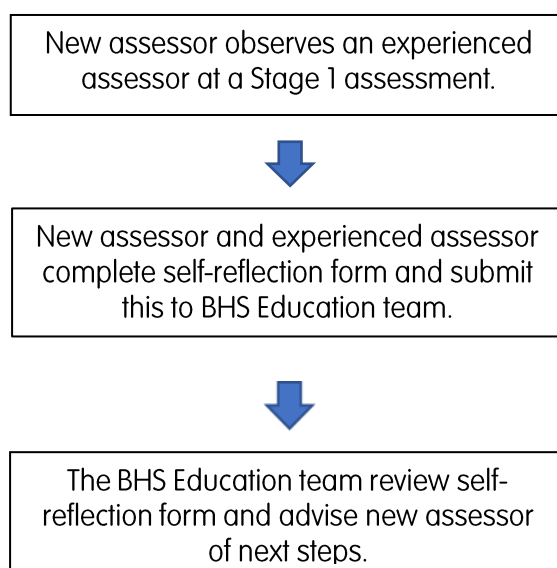
9. Assessor training

Initial assessor training will be held at a BHS Approved assessment centre. Attendance of this training in person is mandatory. The training is usually up to three days. The aim of the training is to assess applicant's knowledge of the standard, inter-personal skills and ability to provide feedback. The training may require applicants to do some or all of the following:

- Standard setting
- Mock assessment scenarios
- Provide feedback (spoken or written)
- Other, as relevant.

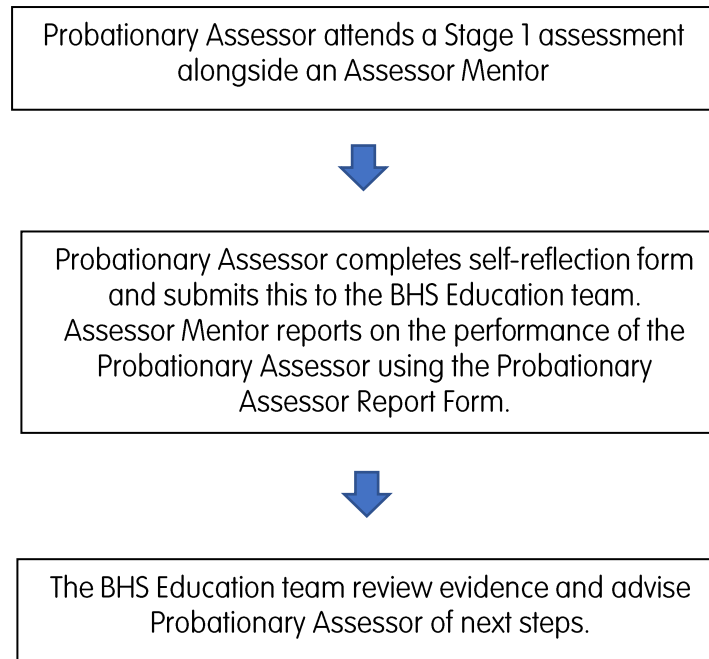
Applicants who reach the required standard may be offered an assessor contract. All assessors retain self-employed status.

The new assessor will normally follow the procedure outlined below, (they must be available to commence this within six months of their initial assessor training). A different procedure is followed for new assessors who will assess the BHS Fellowship only.



This process is repeated until the BHS Education team and the new assessor are satisfied that the new assessor is ready to begin acting as a Probationary Assessor, (where they will be making assessment decisions and providing candidate feedback in a limited capacity alongside an experienced assessor).

The Probationary Assessor must be available to begin the following process within six months of being appointed as a Probationary Assessor:



This process will be repeated as required, at which point the BHS will notify the Probationary Assessor that they have been listed as a Stage 1 Assessor and are able to assess independently at this level. They may initially be subject to higher frequency of IQA activity than other assessors at the same level. The assessor must offer to attend their first assessment within six months of completing the probationary phase.

Should a concern arise with regard to the performance or conduct of a new or Probationary Assessor, they may be withdrawn from the training process at any time.

For details of how assessors upgrade to Stage 2 and above, please refer to section 11.

10. Assessor Continual Professional Development

All assessors will be required to attend regular Continual Professional Development (CPD) training to ensure they remain up to date with current industry practice, assessment standards and any updates to BHS guidance or policies. Specific assessor CPD will be delivered by the BHS or the awarding organisation, British Horse Society Qualifications (BHSQ). This training is mandatory.

Training may be delivered in-person or online and the BHS will keep a log of attendance. Non-attendance at CPD training or failure to take on board BHS updates may have a detrimental impact on the assessor's risk-rating. Please see section 12 for further guidance on risk-rating.

11. External workforce deployment

Assessors are invited to offer to attend assessment dates through the 'assessor sort', which usually takes place every four months. Where assessments are scheduled at short notice or assessors have withdrawn from existing commitments, further allocation lists may be circulated by the BHS between the regular 'sorts'.

The following factors are considered by the BHS when selecting assessors for deployment at assessments:

- Eligibility to assess at the level
- Proximity to assessment centre
- Potential conflicts of interest with centre, candidates or co-assessors
- Assessor risk-rating
- Approved Assessment Centre risk-rating
- Number of existing allocations for the assessor at the relevant level.

Where an assessor does not offer to assess for a 12 month period, this may have a detrimental impact on their risk-rating and continued failure to submit assessment offers may result in assessor status being suspended or removed by the BHS.

Where an Assessor Mentor is required, they will normally be selected from the experienced Lead Assessors who have offered to attend the assessment based on the following factors:

- Proximity to assessment centre
- Potential conflicts of interest with centre, candidates or co-assessors
- Assessor risk-rating - this must be green
- Number of existing allocations for the assessor as an Assessor Mentor
- Eligibility to assess at the level.

Where an Internal Quality Assurer is required, either on the assessment day or retrospectively, they will be deployed based on the following factors:

- Proximity to assessment centre, (if in-person IQA activity)
- Potential conflicts of interest with centre, candidates or co-assessors
- Number of existing allocations for the Internal Quality Assurer.

12. Assessor risk-rating

The BHS will risk-rate each assessor using the following red, amber, green system, based on their performance at previous assessments:

- Green – assessor poses a low risk to the integrity of the qualification.
- Amber – assessor poses a medium level of risk to the integrity of the qualification.

- Red – assessor poses a high level of risk to the integrity of the qualification..

This rating will determine the level of Internal Quality Assurance (IQA) activity to which the assessor is subject and if the assessor is deemed to be high risk, an improvement plan may be implemented.

Assessor performance is monitored via means such as internal and external quality assurance activity, response to BHS Education Team communications and updates, candidate feedback, assessment centre feedback, whistleblowing, malpractice or maladministration concerns and through the investigation of complaints or appeals. Concerns are recorded as either minor or major.

13. Assessor upgrades

Where the BHS determines that additional assessors are required at a particular level or levels, existing assessors will be informed that applications to upgrade their status are open. This may or may not be limited to a specific region. The criteria to upgrade and the application process will be detailed in the application advert.

Assessors will be selected to upgrade based on the following factors:

- Technical competence and currency
- Existing assessor record and risk-rating
- Availability to assess
- Location (if recruitment is region specific).

Assessors who have applied to upgrade will be informed of the outcome in writing. The assessor will then be listed as a Probationary Assessor for that level and will go through the process as detailed in section 7. Once the assessor has completed the Probationary Assessor period, they will be listed as an assessor for that level. The newly upgraded assessor may be subject to a higher frequency of IQA activity for the level/s at which they are newly qualified to assess.

14. Removal of assessor status

The BHS may remove assessor status at any time and any such decision will always be communicated to the assessor. This will be based on risk and will normally follow a period of consultation. In addition, an Assessor may request the removal of their Assessor status. When Assessor status is removed, Assessor Mentor and Internal Quality Assurer status will automatically be removed if present.

Where an assessor has not assessed at a particular level for more than 3 years, the assessor's risk rating will automatically move to high risk for that level and the assessor will need to provide evidence that they have attended standardisation training before they are able to assess at that level.

15. Record Keeping

The BHS Education Team must maintain records of all applications and assessors for audit and monitoring purposes. This includes:

- Name
- Date of birth
- Address
- Email
- Up to date CV
- Continual Professional Development Records
- References.

Records will be maintained securely. Data will be processed only to ensure stakeholders act in the best interest of the BHS. The information provided will not be used for any other purpose.

Personal data will be held for the duration of time that the individual holds a formal, professional role with the BHS Education Team, and for a further six months, in order to ensure transparency in decision making and to identify trends. Please see the BHS Privacy notice ([BHS.org.uk/privacy](https://www.bhs.org.uk/privacy)) for further information about how we use personal data.

Appendix 1 – Translators

Appendix 1.1 – Definition

Translator refers to an individual who provides direct translation from the language of assessment to English and from English to the language of assessment.

Appendix 1.2 – Scope and applicability

This appendix applies to all regulated BHS Career Pathway assessments awarded by BHSQ. It does not apply to unregulated assessments awarded by BHS.

Appendix 1.3 - Role description and expectations

A BHS Translator is appointed by the BHS Education Team. Their roles and responsibilities include:

- Providing direct verbal translation of BHS Policies and Procedures.
- Providing direct verbal translation of instructions given or questions asked by assessors/assessment centre personnel.
- Providing direct verbal translation of candidate responses to assessors.
- Providing direct verbal translation between candidates and volunteer riders at coaching assessments.
- Providing written translation as requested.
- Keeping up to date with updates sent by the BHS Education Team.
- Maintaining familiarity with current equestrian terminology in both English and the language of assessment at the relevant assessment level.

The skills and behaviours we expect BHS translators to uphold include:

- Excellent communicator
- Excellent time management
- Approachable
- Welcoming
- Organised
- Polite manner with all candidates, BHS assessors, BHS employees, Approved centre employees and others you may come into contact within your role as translator
- Responsive
- Unbiased.

Appendix 1.4 – Translator recruitment

The policy for translator recruitment in the UK and Republic of Ireland mirrors that laid out above for assessors, although the language of translation will be specified in the recruitment advertisement. The recruitment of translators may be authorised by the Director of Education, Head of Education Operations or Head of Education Development.

Outside the UK and Republic of Ireland, translators will normally be recruited by assessment centres but the centre must supply BHS with an up to date CV for each translator for approval prior to deployment.

Appendix 1.5 – Translator training

Before their first deployment, all translators will be required to watch an online briefing video, to be provided by BHS Education. This session will cover the format of the assessment day, expectations placed on translators and the documentation to be completed.

Following this session, translators working at assessments in the UK or Republic of Ireland will be offered a BHS Education Contractor agreement, to be renewed annually. Translators working outside the UK and Republic of Ireland will be asked to sign a role description.

Appendix 1.6 – Translator deployment

When a translator is required at an assessment in the UK or Republic of Ireland, BHS Education will ask translators who have a current BHS Education Contractor Agreement in place and are able to translate in the relevant language if they are available to attend.

Translators will be selected for deployment based on the following criteria:

- Familiarity with equestrian terminology in language of assessment and translation at the assessment level
- Proximity to assessment centre
- Potential conflicts of interest with centre, candidates or assessors
- Number of existing allocations for the translator
- Feedback from assessors and candidates at previous assessments
- Results of previous quality assurance activity.

When a translator is required at an assessment outside the UK or Republic of Ireland, the assessment centre will normally deploy the translator directly.

Appendix 1.7 – Quality Assurance of translation

Feedback from assessors, candidates and Internal or External Quality Assurance activity is considered by the BHS Education team when making decisions around translator deployment. The BHS may also video assessments where translation is used and ask an independent translator to quality assure the translation. Translators will always be informed where assessments are being filmed.

Appendix 1.8 – Translator status

The BHS may remove translator status at any time and any such decision will always be communicated to the translator. Where translators are deployed outside the UK and Republic of Ireland directly by assessment centres, the assessment centre will also be informed of the removal of translator status.

A translator may request the removal of their translator status at any time.

Appendix 1.9 - Record Keeping

The BHS Education Team must maintain records of all applications and translators for audit and monitoring purposes. The Record Keeping section of the External Workforce Recruitment and Deployment Policy applies.