EXAMINATIONS HANDBOOK
Standard Operating Procedure 21
Chief Examiners Instruction Pack

Amendments and date of issue

Amendments to this Standard Operating Procedure (SOP) can be authorised only by the Chair of the Qualifications Board in consultation with that Board and the Examinations Committee.

This issue is 2020 version 2 and is dated November 2021.

Register of amendments

Version	Brief description of Amendment	Amendment	Date approved
2020.1	New handbook		23/11/2020
2020.2	London CE as Moderator. Text removed: ~~Paper One (Background Knowledge) will not be moderated by London Chief Examiner.~~	p.3	29/11/2021
	London Coach Examination	p.4	
	Feedback to Candidates	p.10, Section 8, NB paragraph	

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List of contents

1. Duties and Responsibilities of Chief Examiner

The Chief Examiner, together with the Office Examinations Officer, will be responsible for all examination arrangements, and will advise the Course Director on all examination procedures.

The Chief Examiner must:
- be familiar with the current Examinations Handbook, which sets out the Institute's rules for conducting Examinations, and any updates advised by the Qualifications Board.
- work within the Institute's framework including reporting and the use of standard forms and templates.

Before the Examinations				
Chief Examiner Duties and Responsibilities	**Blue Badge (London)**	**Blue Badge (Regional)**	**Green Badge**	**White Badge**
Set examination dates in liaison with Examinations Officer and Course Director.	✔	✔	✔	✔
Have agreed a target date on which the results will be posted, which is normally within 6 weeks of the last examination.	✔	✔	✔	✔
Select suitably qualified Examiners for each aspect of the examinations from the Institute Register of Examiners.	✔	✔	✔	✔
Select suitably qualified Compilers and Moderators.	✔	✔	✔	✔

Ensure that selected Examiners, Compilers and Moderators fully complete application forms.	✔	✔	✔	✔
Provide the Examinations Officer with a full list of suggested Examiners, Compilers and Moderators for written and practical examinations, together with rationale and application forms for approval by the Examinations Committee.	✔	✔	✔	✔
Once agreed, the Examinations Officer will send out appointment letters to the Examiners.	✔	✔	✔	✔
Be responsible for producing the Background Knowledge paper to be used nationally in consultation with other current regional Blue Badge Chief Examiners.	✔			
Consider appointing a Coach Co-ordinator who might then go on to become an examiner.	✔	✔		
Ensure venues and invigilators are recommended to Examinations Officer by Course Director.	✔	✔	✔	✔
Provide Examinations Officer with examination times, venues and coach company including contact details.	✔	✔	✔	✔
Work with the Examinations Officer to ensure that all venues for examinations, coach companies and invigilators have been booked by the office.	✔	✔	✔	✔
Monitor the work of Examiners, Compilers, Moderators, independent observers (such as site representatives) and the Coach Co-ordinator before and during the course of the examinations.	✔	✔	✔	✔
Moderate the compiled examination papers.	✔	✔	✔	✔
A final version of the examination paper(s) will be agreed between the compiler, the Chief Examiner, and the other Moderator at least **TWO** weeks before the date of the examination.	✔	✔	✔	✔
The Chief Examiner will send the final paper to the Examinations Officer at least **TWO** weeks before the date of the examination.	✔	✔	✔	✔

	Blue Badge (London)	Blue Badge (Regional)	Green Badge	White Badge
Nominate a marker for the Tour Planning Project.	✔	✔	✔	
Moderate the marked Tour Planning Projects.	✔	✔	✔	
Hold examination briefing and information meeting with candidates prior to main examinations.	✔	✔	✔	✔
Brief all examiners at a pre-examination briefing for each set of examinations / examination session.	✔	✔	✔	✔
If appropriate, allocate no more than one Shadow Examiner per examination and inform the Examinations Officer.	✔	✔	✔	✔
Be aware of any special needs of candidates and ensure appropriate arrangements have been made.	✔	✔	✔	✔
Attend all meetings of the Steering Group for the programme.	✔	✔	✔	✔

The Chief Examiner will become familiar with the syllabus and suggested examination sites of the area of examination, then agree with the Course Director				
Chief Examiner Duties and Responsibilities	**Blue Badge (London)**	**Blue Badge (Regional)**	**Green Badge**	**White Badge**
How questions are to be grouped in papers 2 and 3, e.g. by county, geographic area or syllabus category, or randomly. This information will be communicated clearly to Candidates and the Compiler.	✔	✔		
Subjects for the Tour Planning Project together with the brief, marking scheme and completion date.	✔	✔	✔	
Suitable route(s) for the coach examination, combining rural and built environment (where appropriate).	✔	✔		
Devise sufficient routes (usually 6 different routes) for the coach examinations which will not be disclosed to Candidates until 15 minutes prior to the exam.	✔			

	Blue Badge (London)	Blue Badge (Regional)	Green Badge	White Badge
Specific sites for place of worship/art gallery/museum/rural walk examinations identifying selected stops to be covered.	✔	✔	✔	
Walking routes, with stopping points to be covered in the examinations, and providing sufficient opportunities to test safety awareness.	✔	✔	✔	✔
Provision of syllabi and routes/stopping points for each site and the walking tour.	✔	✔	✔	✔
The walk and the place of worship should include a list of key bulleted points to be covered at each stop to avoid duplication.	✔	✔	✔	
Provide route plans identifying stops, for use by Candidates and Examiners.	✔	✔	✔	✔
A date for the Chief Examiner's Candidates' briefing.	✔	✔	✔	✔

During the practical examinations, the Chief Examiner will oversee the process and:				
Chief Examiner Duties and Responsibilities	**Blue Badge (London)**	**Blue Badge (Regional)**	**Green Badge**	**White Badge**
See all the Candidates perform at least twice.	✔	✔	✔	✔
See each Examiner at least twice.	✔	✔	✔	
Attend all coach examinations.	✔	✔		
For the practical examination the Chief Examiner will be the Examiner.				✔
Where possible, attend all marking discussion sessions after each examination.	✔	✔	✔	
Ensure that the language used for assessment is English.	✔	✔	✔	
Attend examination debriefing sessions.	✔	✔	✔	✔
Assess the Candidates along with representatives from the site.				✔
Ensure that the language used for assessment is English, or where appropriate an interpreter in the case of sign language.				✔

Following the examinations the Chief Examiner will:				
Chief Examiner Duties and Responsibilities	**Blue Badge (London)**	**Blue Badge (Regional)**	**Green Badge**	**White Badge**
Collate, moderate and analyse for consistency in marking and verify results from all examinations.	✔	✔	✔	✔
Discuss candidate performance and conduct of examinations, in general terms, with the Course director and provide him/her Candidate Evaluation Forms for any failed candidates. Marks should not be shared with the candidate.	✔	✔	✔	✔
Produce Candidate Evaluation forms for any unsuccessful candidates at practical modules and discuss these with Course Director.	✔	✔	✔	✔
Produce a comprehensive written report to the Qualifications Board on the procedures followed and results obtained at all examination modules with recommendations for the award of qualifications.	✔	✔	✔	✔
Provide necessary information for any appeals, and other activity following examinations.	✔	✔	✔	✔
Respond to any additional responsibilities agreed from time to time by the Examinations Committee and included as amendments to the Examinations Handbook.	✔	✔	✔	✔
Attend the award ceremony.	✔	✔	✔	✔

2. Communication with Examinations Officer

 The Chief Examiner together with the Examinations Officer will be responsible for all examination arrangements and will advise on all examination procedures.

On acceptance, the Chief Examiner and the Examinations Officer will have a briefing to go through the process together.

Before the meeting the Chief Examiner must be familiar with the current Examinations Handbook, any updates and the Chief Examiner's Pack.

Chief Examiner to check availability of dates for examinations with Examinations Officer.

The Examinations Officer will advise Chief Examiner of any specific requirements issued by Accreditation.

As the Institute uses Microsoft operating systems, the Chief Examiner will ensure **all documents** that are sent electronically to the Examinations Officer are in Microsoft file formats e.g. Word or Excel (.docx or .xlsx). It is the responsibility of the Chief Examiner to convert their files to these formats if using Mac or other operating systems.

3. Communication with Course Director

On appointment the Chief Examiner should make early contact with the Course Director. The following checklist is suggested for this meeting:

The Chief Examiner and Course Director will agree:	Blue Badge (London)	Blue Badge (Regional)	Green Badge	White Badge
The dates of the Practical and Written Examinations, in consultation with the Examinations Officer.	✔	✔	✔	✔
The number of candidates to include Candidates who are Blue Badge Tourist Guides and full course Candidates and whether it is likely numbers will increase. Numbers will impact on the examination timetable.	✔	✔		
That the Course Director will send the list of enrolled Candidates, with any special needs and languages requirements to the Examinations Officer.	✔	✔	✔	✔
That the Course Director will keep the Examinations Officer informed of any changes, who in turn will keep Chief Examiner updated.	✔	✔	✔	✔
To ensure that the Course Director, Chief Examiner and Examinations Officer have the same up-to-date versions of the course timetable and syllabi.	✔	✔	✔	✔
That the Course Director will inform the Chief Examiner of Steering Group meeting dates and copy the Chief Examiner in on all minutes and agendas (Chief Examiner is automatically a member of this committee).	✔	✔	✔	✔

A date for the Chief Examiner Candidates' Briefing. This should be incorporated into the course timetable.	✔	✔	✔	✔
Criteria for each examination. It is important to ensure that the set of examinations as a whole achieves a wide coverage of the region, area or site, its key subjects and themes.	✔	✔	✔	✔
The format of Papers 2 and 3. These papers may be distinguished either on the grounds of subject matter or geography (e.g. one in the North and one in the South) or one comprising short answers questions and one comprising long answer questions.	✔	✔		
To decide three themes for the Tour planning project.	✔	✔	✔	
That the Course Director will recommend venues and invigilators for Written Examinations to the Examinations Officer - new venues to be assessed and passed as suitable by the Chief Examiner.	✔	✔	✔	✔
To arrange a visit(s) to the agreed venue(s) for the Examinations and liaise with relevant the site contact.	✔	✔	✔	✔
To go through routes and stopping points for the walk, place of worship, museum/gallery and coach route. Once agreed, the Chief Examiner will submit to the Examinations Officer.	✔	✔		
The specific sites and walking routes, with stopping points, instructions, and scope of each stop for presentations, to be covered in the examinations.			✔	
The stopping points for presentations within the site or on the walking route to be covered in the examination.				✔
To arrange an overview of the coach route with Course Director or a tutor.		✔		
Dates for announcement of the venues for the Practical Examination no later than three months prior to the start of the Examination together with the syllabi and routes/stopping points (with aides-memoire) for all practical examinations. The Chief Examiner will send these to the Examinations Officer.	✔	✔	✔	
That the Coach route to be announced to students six weeks prior to the examination.		✔		

The Chief Examiner will send this to the Examinations Officer.				
That the Course Director will send course materials, documents, sample questions and aides memoire provided to students to the Examinations Officer at least 10 weeks prior to the written examinations.	✔	✔	✔	✔
To finalise examination groups and timetable 10 weeks prior to the examinations and submit to Examinations Officer. Chief Examiner to ensure the spread of examinations is fairly allocated.	✔	✔	✔	✔
To announce final examination groups and examination timetable to Candidates at least nine weeks prior to the examinations.	✔	✔	✔	✔
To discuss invites for any guests for the examinations eg Cathedral, museum, gallery staff or tour operators on coach.	✔	✔	✔	✔

4. Selection of Practical Examiners

Chief Examiners to refer to Policy on advertising and appointing Chief Examiners, Examiners, Compilers and Moderators (SOP 64)

5. Communication with Practical Examiners

After the Appointment letters have been sent out, the Chief Examiner will arrange an Examiner briefing. If the Examiners are not located in the region, it may be preferable to arrange for an initial briefing online, followed by a final briefing the night before or on the morning of the examination.

The Examinations Officer will send the routes and stopping points together with aides-memoire and venue syllabi once they have been approved and at least three months prior to the examinations (six weeks prior for the coach route).

Examiners Briefing to include:
- Code of Conduct for Examiners (SOP 3)
- Examiners in Practical Examinations Instruction Park (SOP 24)
- How to use a Mark Sheet (SOP 24)
- Mark Sheets (SOP 24)
- Course Director notes for Examiners regarding any issues or practical points raised by Tutors and Students.

6. Compiling, Marking and Moderation of Written Examinations

Chief Examiners to refer to <u>Policy on advertising and appointing Chief Examiners, Examiners, Compilers and Moderators</u> (SOP 64)

7. Chief Examiner's Candidate Briefing Notes

See Briefing Notes for Chief Examiners meeting with Candidates (see Appendix 3) (Will be completed in 2021)

Course Director to ensure any concerns/queries re: the route/modus operandi are raised for Chief Examiner to clarify for candidates (NB where applicable these are to be shared with examiners at the Examiner's Briefing). This applies to special requirements/considerations.

8. Chief Examiner's Report and Examination follow up

On completion of the examinations, Chief Examiner to produce:
- o A comprehensive written report to the Qualifications Board to include procedures followed, results obtained in all examination modules with recommendations for the award of qualifications.
- o Candidate Evaluation Sheets for any unsuccessful candidates to go with the report.
- o Necessary information for any appeals, and other activity following examinations.

N.B. Unsuccessful Candidates in practical examinations will receive feedback as soon as possible after the results of the examination are notified. The Chief Examiner will send individual evaluation sheets to the Course Director who will share this information with candidates who have failed.

The Chief Examiner must not enter into direct communication with candidates.

9. Resit examinations

For Blue Badge examinations, Candidates are entitled to **TWO** opportunities to resit a failed examination except examination four (Tour Planning Project) where only **ONE** resit opportunity is allowed.

For Green Badge and White Badge examinations, Candidates are entitled to **ONE** opportunity to resit a failed examination.

Practical resit examinations will take place no earlier than **EIGHT** weeks from the date of notification of the examination results. Written resit examinations will normally take place no earlier

than **FIVE** months after notification of results. Second resit examinations will normally take place no fewer than **FOUR** months after the first resit examination.

For a failed Blue Badge Tour Planning Project, Candidates have **THREE** months to complete the project from the date that they are informed that they have failed.

At a failed Green Badge Tour Planning Project, Candidates have **TWO** months to complete the project from the date that they are informed that they have failed.

Chief Examiners must ensure that Examiners who have failed Candidates at a practical examination will not examine the same Candidates at any resit examination at the same location.

Chief Examiners will be very familiar with and fully understand the Institute's procedures on Equal Opportunities and Special Needs (SOP5), Mitigating Circumstances (SOP6) and Appeals (SOP7).

Appendix 1
Practical examination syllabi, route stops and bullet points

Template for a site syllabus
Syllabus to include:

Practical

The student will be aware of:

- the permitted visiting hours
- any rules governing photography
- regular church service times, if applicable
- relevant contact telephone numbers
- group welcome procedure
- site rules and regulations
- guiding protocol
- areas where guiding is not permissible
- guided tours available
- current or future events taking place
- impact of timing of a visit, particularly events, services etc
- relevant health and safety issues
- the nearest toilet facilities, disabled access, refreshment and retail opportunities

Background

The student will be able to:

- describe the foundation and history of the site
- explain the site's significance
- explain the roles key personnel, if appropriate e.g. Cathedral personnel
- explain the daily routine, events etc, if applicable
- describe key events and people from the site's story

External Features
The student will be able to identify and comment on:
   Bullet point list of key aspects to be covered

Internal Features and Furniture
The student will be able to locate and comment on the key
   Bullet point list of key aspects to be covered

Template for a walking tour syllabus
Walking Tour Syllabus - village, town or city
The examination route – brief route overview, starting and finishing points
Candidates will be expected to demonstrate a sound knowledge of the town drawing out:

- o   the historical background
- o   the social history and industrial development
- o   the town's architecture, ranging from its beginnings through to the present day
- o   the geographical location and its relevance
- o   the transport network
- o   the story and traditions
- o   the town's civic traditions
- o   personalities associated, past and present
- o   the town today: commerce and industry; leisure and tourism; education establishments, hospitals

Candidates should be aware of the attractions that the town has to offer the visitor and be familiar with its amenities.

Template for list of stops for Modules 5, 6 and 7

Places of worship and walking tours should include key bulleted points to be covered at each stop - see example below

Museum and Gallery tours should include list of stops only

Heart of England Blue Badge Birmingham Walking Tour

1.   Outside Saint Martin's Church
   - o   The origins of Birmingham
   - o   Introduction / safety / tour outline
   - o   Saint Martin's Church
2.   Edgbaston Street
   - o   Civilian War Dead memorial
   - o   Rag Market and Bull Ring markets past and present
   - o   Site of Manor House
3.   Rotunda Square
   - o   The Rotunda Building
   - o   The Bull sculpture
   - o   The street plan of the area and street names
   - o   William Hutton

Etc.

Appendix 2
List and rationale for choice of examiners

(Name and level of qualification) BADGE GUIDE EXAMINERS

Coach	Cathedral	Gallery	Walk	Compiler	Moderator	Project marker

Selection method and rationale for choices

Using the Institute's Register of Examiners the selection should be made in order as follows:

a) Qualified examiners for the region
b) Examiners with experience examining in the region
c) Those experienced in the field applicable to the examination eg cathedral, gallery guiding etc.
d) Those with knowledge of the region - this may need to be ascertained by way of an email from the Examinations Officer to all examiners

Please give the name and a brief rationale for each choice:

Cathedral
Examiner 1
Examiner 2
Coach
Examiner 1
Examiner 2
Museum or Art Gallery
Examiner 1
Examiner 2
Walk
Examiner 1
Examiner 2
Project
Compiler
Moderator

Appendix 3
Briefing Notes for Chief Examiners meeting with Candidates

currently being revised

Appendix 4
Chief Examiner – Key Deadlines

Deadline	Action
Once Chief Examiner appointed	The Chief Examiner to select Examiners, Compilers, Moderators and Markers and send their application forms to the Exams-coordinator alongside supporting rationale for consideration by the Examinations Committee.
Once Chief Examiner appointed	Chief Examiner and Course Director to approve Tour Planning Project brief.
3 months prior to submission date	Tour Planning Project Briefs given to Candidates.
Once Chief Examiner Appointed	Course Director to tour and agree syllabi, routes and stopping points for practical examination(s).
At least 3 months prior to practical examinations	Routes/stopping points (with aides-memoire) and syllabi for practical examinations to be announced to students (except coach route).
10 weeks prior to practical examinations	Chief Examiner and Course Director to agree and submit Examination Groups and timetable to the Examinations Officer
10 weeks prior to written examinations	Course Director to send all paperwork to Examinations Officer for written examinations - course materials, aides-memoire and sample questions provided to students to Examinations Officer.
At least 9 weeks before examinations	The Chief Examiner will notify the Examinations Officer when to send out the dates of the examinations. This will be done at the earliest possible opportunity.
6 weeks prior to practical examinations.	Coach route to be announced to Candidates (except London).
2 weeks prior to written exams	A final version of written examinations – Paper Two and Three will be agreed between the compiler, the Chief Examiner, and the other Moderator at least **TWO** weeks before the date of the examination.
Within 2 weeks of written examinations	After marking, the Marker will liaise with the Moderator(s) and the Chief Examiner if this is a separate person. The Marker will give the Moderators access to the papers.
By 6 weeks after last examination.	Results to be given to Candidates.