

Education and Training Committee

Meeting Date	04 March 2026
Title	Update to Education partner allocation framework
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Executive Sponsor	Andrew Smith, Executive Director of Education, Registration & Regulatory Standards
Executive Summary	
<p>This paper presents a proposed minor change to the Education partner allocation framework, to enable better use of all three Education partner roles through our assessments.</p> <p>Primarily this change is from the current requirement to engage lead visitors for certain assessments, where visitors could be used as a first option. The competencies of roles have been considered in changing the resourcing requirements, to ensure they align with the activities undertaken.</p> <p>There are no resourcing costs, and we expect to see a small saving per assessment for partner fees in the performance review process.</p>	
Action required	The Committee is asked to agree the proposal in the paper.
Previous consideration	<ul style="list-style-type: none"> The Executive Leadership Team (ELT) considered this proposal in February, and were happy for this to be submitted to the Education and Training Committee (ETC) for consideration and a decision. The ETC approved the Education partner allocation framework in November 2021, and therefore changes need to be agreed by the Committee.
Next steps	<ul style="list-style-type: none"> If agreed, future partner allocations using the updated framework (from the start of the 2026-27 financial year).
Financial and resource implications	No additional costs – but there will likely be a small reduction in partner fees for future budgets, with the removal of additional visitors as standard in performance review
Associated strategic priority/priorities	Build a resilient, healthy, capable and sustainable organisation

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Associated strategic risk(s)	5.a The resources we require to achieve our strategy are not in place or are not sustainable
Risk appetite	People - open
Communication and engagement	As the proposed changes are minor, we will not need to formally engage on the changes or communicate them with external parties. Internally, we will update guidance so the revised framework is adopted.
Equality, diversity and inclusion (EDI) impact and Welsh language standards	No negative impact, but the revised framework will enable a broader range of partners to be engaged to undertake education assessments.
Other impact assessments	None
Reason for consideration in the private session of the meeting (if applicable)	Not applicable

Update to Education partner allocation framework

1. Background

- 1.1 For assessments of education providers and programmes, our legislation requires that “Visitors shall be selected with due regard to the profession with which the education and training they are to report on is concerned and at least one of the visitors shall be registered in that part of the register which relates to that profession”¹.
- 1.2 We have three partner roles in Education, which are deployed through our assessments based on the purpose of each assessment (and assessment stage for the approval process). The three partner roles are designed with this in mind, and there are different competencies set out for the three roles as follows:
 - 1.2.1 Visitors – analytical thinking, sound judgement, clear communication, collaborative interpersonal skills, and knowledge of quality assurance and public interest principles;
 - 1.2.2 Lead visitors – in addition to the visitor requirements, understanding strategic priorities, demonstrating leadership in stakeholder engagement, integrating diverse views, seeking advice when needed, experience of leadership, identifying best practice and innovation; and
 - 1.2.3 Service user expert advisors (SUEAs) – the same competencies as the visitor role, with the only difference being that SUEAs cannot be HCPC registrants, and must have used the services of an HCPC regulated profession.
- 1.3 Visitors and lead visitors are both considered as ‘visitor’ roles, and therefore at there must be at least one visitor or lead visitor from the profession a programme is concerned with on each assessment. This is the only legislative requirement for partner selection (in addition to conflict of interest considerations).
- 1.4 We primarily engage lead visitors and SUEAs through our assessments. This is due to how the partner resourcing requirements were set out through development of our current quality assurance model.
- 1.5 We have found that most visitor partners are not invited to undertake assessments – our intention when developing the model was that assessments would normally be led by lead visitors, and that we would engage visitors when we needed to through assessments, for example when there is a profession specific area to be addressed outside of the lead visitors’ profession(s).
- 1.6 However, we have found we often do not need to engage visitors in this support capacity because:
 - 1.6.1 most stage 2 approval assessments have professional coverage by lead visitors, due to our current partner resourcing requirements; and
 - 1.6.2 most performance review assessments do not require detailed profession-specific assessments, due to the nature of developments made by education providers often sitting at the institution or cross professional level.

¹ [hcpc-consolidated-legislation.pdf](#) (Part IV, 16(6))

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- 1.7 This means that we have 62 partner visitors (almost half of our partners) who rarely undertake assessments. The impact of this is that:
 - 1.7.1 the financial and resource cost for recruiting and maintaining these partners (eg initial recruitment, renewal of contracts, ongoing learning and development) is wasted;
 - 1.7.2 we are not meeting expectations visitors have of us – that they would undertake assessment activities.
- 1.8 We have undertaken the following actions to address the problem of under engaging visitor partners:
 - 1.8.1 aim to ‘convert’ visitors into lead visitors. When recruiting lead visitors, we have often applied an expression of interest process where visitors can convert to lead visitors, but we have not had good take-up of this offer; and
 - 1.8.2 attempted to enhance the experience of visitors, to support them in this progression, by attaching one visitor (in addition to the normal panel of two lead visitors and one SUEA) to each performance review assessment. This incurs additional cost, of £91.90 per assessment (budgeted cost for 2026-27 is approximately £3k), and we normally consider that we do not need this additional partner role to undertake a high quality assessment.

2. Proposal/Analysis

- 2.1 Our visitor partners are experienced individuals, who can add value to our assessments, and therefore we should use the services of these partners where possible. Not regularly engaging these partners is a product of our partner resourcing model, with strict requirements that lead visitors are in place for all parts of performance review and approval assessments.

2.2 We are proposing changes to the partner resourcing model as follows:

Process (including stage)	Purpose	Partner involvement (current)	Proposed change	Rationale
Approval stage 1 (institution level) assessment	Assess the institution / model of learning against institution level standards. Assessment is the basis for the stage 2 approval assessment, any future monitoring assessments, and most future new programme proposals	<ul style="list-style-type: none"> Two lead visitors, from the profession(s) (inclusive of modalities) with which the programme is concerned One SUEA 	None	No change required, because lead visitors have the skills, knowledge and experience to consider across professional provision. The SUEA remains so we have expert insight on service user involvement at the institution level
Approval stage 2 (programme level) assessment	Assess the programme against programme level standards. Assessment ensures that the programme can deliver learners who meet our requirements for registration, and does not reconsider agreed areas from stage 1	Two lead visitors, from the profession(s) (inclusive of modalities) with which the programme is concerned	<ul style="list-style-type: none"> Maintain that two partners from the profession with which the programme is concerned (inclusive of modalities) normally undertake the assessment These partners can be visitors or lead visitors 	Assessments are at the programme level, meaning partners require professional experience that enables them to assess programme level standards, and therefore do not need the skills, knowledge or experience to consider across professions (at the institution level)

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Process (including stage)	Purpose	Partner involvement (current)	Proposed change	Rationale
Performance review	Assess the institution's performance linked to our education standards. Focus is at the institution level wherever possible, and profession specific areas are considered as required. Make a risk based decision about the performance of the education provider, and when they should next be reviewed (1-5 year period)	<ul style="list-style-type: none"> • Two lead visitors, from the profession(s) (inclusive of modalities) delivered by the institution • One SUEA • One visitor as standard • Additional visitors where there are profession specific questions outside of the two lead visitors' and visitor's professions 	<ul style="list-style-type: none"> • Maintain two lead visitors, and one SUEA as standard • Maintain ability to engage additional visitor(s) where the assessment requires this • Remove the current expectation that all assessments will be supported by an additional visitor 	With the changes above, visitors will be involved more in approval assessments, and therefore we do not need to grow their experience through attaching visitors as standard to all performance review assessments
Focused review	Assess issues linked to our education standards. Focus is context specific. Make a risk based decision about whether any regulatory action is required for the programme, ranging from no further action required, to withdrawing approval	Context dependent – normally 1-2 professional partners (lead visitors or visitors) to provide advice to the executive in their recommendation, or in rarer circumstances a SUEA may be involved (independently or as part of a partner panel)	None	No change required as the appointment of partners is context specific

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2.3 The benefits of these changes are:

- 2.3.1 use of a broader range of partners, addressing that some partners remain 'dormant' as we do not invite them to undertake activities;
- 2.3.2 address challenges with resourcing partners for specific assessments
- 2.3.3 with the removal of additional visitors as standard in performance review, reduction in budget spend of £91.90 per assessment (budgeted cost for 2026-27 is approximately £3k).

2.4 We have taken this opportunity to make minor amendments to the partner allocation framework for clarity, but these amendments have not changed expectations for resourcing assessments (except in the ways described above).

3. Financial and resource implications

3.1 No additional costs – but there will likely be a small reduction in partner fees for future budgets, with the removal of additional visitors as standard in performance review.

4. Risk appetite

4.1 There are two minor risks, which are mitigated as follows:

- 4.1.1 Reduction in activity for lead visitors – we currently have 65 lead visitors and expect to have 125 lead visitor engagements in the 2025-26 academic year. Not all lead visitors undertake work for us (which is a separate issue, currently being addressed), so although there will be a slight reduction in the number of activities lead visitors are invited to, those that volunteer for assessments will normally still be selected for a similar amount of work.
- 4.1.2 Change to expectations for the team when inviting and selecting partners – mitigated by updates to process guidance, system templates, and management oversight.

5. Next steps

- 5.1 Updates to internal operating guidance.
- 5.2 Partner allocation changes apply from April 2026.

6. Recommendation(s)

6.1 The Committee is asked to agree the proposals as set out through this paper and the appendix.

7. Appendices

7.1 Appendix 1 – partner resourcing framework (updated with tracked changes).

Contact for further information:

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All partner panels undertaking stage 1 approval assessments for the HCPC will:

No.	Always or Normally	Consideration
1	Normally	<p>For pre-registration programmes – have at least one lead visitor or visitor from the same part of the Register as the programme being proposed (inclusive of modalities)</p> <p>For post-registration programmes:</p> <ul style="list-style-type: none"> • have at least one visitor whose registration record is annotated with the appropriate entitlement (or is appointed to the appropriate role) for the programme in question; or • gave at least one non-HCPC registered professional who is registered as an independent prescriber with the General Pharmaceutical Council or the Nursing and Midwifery Council, or are on the orthopaedic surgery specialist register of the General Medical Council.
2	Always	Have one service user expert advisor
3	Always	Not contain any lead visitor or visitor with significant connections to the education provider, its employees, or learners*.
4	Always	Have at least one member of the panel who has prior experience of undertaking work as a lead visitor or visitor for the HCPC
5	Always	Have at least one lead visitor
6	Normally	Have two lead visitors
7	Normally	Have a lead visitor or visitor with experience of the educational setting and a lead visitor or visitor with experience of the clinical or practice setting.

All partner panels undertaking stage 2 approval assessments for the HCPC will:

No.	Always or Normally	Consideration
1	Always	<p>For pre-registration programmes – have at least one lead visitor or visitor from the same part of the Register as the programme(s) being proposed (inclusive of modalities)</p> <p>For post-registration programmes:</p> <ul style="list-style-type: none"> • Have at least one visitor whose registration record is annotated with the appropriate entitlement (or is appointed to the appropriate role) for the programme in question; or • Have at least one non-HCPC registered professional who is registered as an independent prescriber with the General Pharmaceutical Council or the Nursing and Midwifery Council, or are on the orthopaedic surgery specialist register of the General Medical Council.
2	Always	Not contain any lead visitor or visitor with significant connections to the programme under scrutiny, the education provider, its employees, or learners*.
3	Always	Have at least one member of the panel who has prior experience of undertaking work as a lead visitor or visitor for the HCPC
4	Normally	Have two visitor partners (lead visitors / visitors)
5	Normally	Have a lead visitor or visitor with experience of the educational setting and a lead visitor or visitor with experience of the clinical or practice setting.

All partner panels undertaking performance review assessments for the HCPC will:

No.	Always or Normally	Consideration
1	Always	Have at least one lead visitor
2	Always	Not contain any lead visitor or visitor with significant connections to the programme under scrutiny, the education provider its employees or learners*.
3	Always	Have at least one member of the panel who has prior experience of undertaking work as a lead visitor or visitor for the HCPC
4	Always	Have one service user expert advisor
5	Where professional expertise is required by the assessment, always	<p>Where professional expertise required is related to a pre-registration programme – have at least one lead visitor or visitor from the same part of the Register as the programme being scrutinised (inclusive of modalities)</p> <p>Where professional expertise required is related to a post-registration programme:</p> <ul style="list-style-type: none"> • Have at least one visitor whose registration record is annotated with the appropriate entitlement (or is appointed to the appropriate role) for the programme in question; or • Have at least one non-HCPC registered professional who is registered as an independent prescriber with the General Pharmaceutical Council or the Nursing and Midwifery Council, or are on the orthopaedic surgery specialist register of the General Medical Council.
6	Normally	Have two lead visitors
7	Normally	Have a lead visitor or visitor with experience of the educational setting and a lead visitor or visitor with experience of the clinical or practice setting.

*Where potential conflicts of interest are unavoidable (owing to the size of the profession or where every reasonable effort has been taken to avoid potential conflicts occurring), potential conflicts must be declared to the education provider seeking their views on the potential conflict and legal advice may be sought regarding the individual case before a decision is made whether or not to proceed or seek alternate visitors. When the profession is small, consideration should be given as to whether an experienced educationalist from a different profession should be allocated to the assessment as an additional lead visitor.

Panel selection table (approval process - stage 2, performance review / focused review where professional input required)

		Programme leading to						
		Professional registration	Supplementary prescribing annotation	Independent prescribing annotation	Prescription only medicine (sale / supply) annotation	Prescription only medicine (administration) annotation	Podiatric surgery annotation	Orthoptist exemptions annotation
Visitors' professional role or annotation	Pre-registration profession	Always one						
	Supplementary prescribing		Always one (with expertise in one of these areas)					
	Independent prescribing			Always one				
	Prescription only medicine (sale / supply)				Always one			
	Prescription only medicine (administration)					Always one		
	Podiatric Surgery						Always one	
	Orthoptist exemptions							Always one