

## Terms and Conditions for SBM Programmes (2019)

### Aspiring School Business Managers

### Level 4 Diploma for School Business Managers

### Level 5 Diploma for School Business Leaders

### SBM short training & support packages

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## Glossary

| Phrase /abbreviation  | Definition /description  |
|-----------------------|--|
| SBMP                  | School Business Management Partnership (Serco, Adfecto and NASBM/ISBL). Provider of SBM and associated training programmes   |
| SBM                   | School business management (sometimes also used as an abbreviation for 'school business manager')  |
| Aspiring SBM          | Aspiring school business manager – typically an applicant not currently employed within the education sector and seeking a career change.  |
| Programme             | Includes full SBM and other related programmes, and other support or complete learning packages we may offer   |
| Units                 | A component of a full programme. Selected units are also available to study separately.  |
| Individual units      | Single units which may be offered as separate, stand-alone study options.  |
| ILM                   | Institute of Leadership & Management – accreditation body for our SBM Diploma in School Business Management programmes.  |
| ISBL (formerly NASBM) | Institute of School Business Leadership (formerly the National Association of School Business Management or NASBM) - professional body for school business managers [name changed from NASBM in November 2017]   |
| Learning centre       | Serco Education web platform used to deliver the SBMP e-learning courses and application forms. <a href="http://www.leadershiplearningcentre.com">www.leadershiplearningcentre.com</a>   |
| Face-to-face sessions | Workshop sessions (full or half days) that are included in blended learning programmes and certain other study packages.   |
| CSBM                  | Certificate of School Business Management (previous programme title)   |
| DSBM                  | Diploma of School Business Management (previous programme title)   |
| NCTL                  | National College for Teaching and Leadership. The NCTL previously contracted out the SBM programmes to providers such as the Serco and Adfecto partnership. The NCTL's provision ceased in 2014 but they continued to offer part-funding via a scholarship scheme until February 2016. |

## Terms and Conditions

The following is a contract between the applicant (you) and the School Business Manager Partnership (us). The School Business Manager Partnership (SBMP) is a collaboration between Serco (trading as Serco Education and part of Serco Group plc), Adfecto and the Institute of School Business Leadership (ISBL) to jointly deliver a suite of school business management programmes and associated short courses.

The aim of this Terms and Conditions document is to provide you with information you need to know before applying for the Aspiring School Business Manager programme, Level 4 Diploma for School Business Managers, Level 5 Diploma for School Business Leaders, or any of the individual units or other training and support packages provided by us.

It also explains whether you are eligible to apply, how we will deal with your application and what charges you may or may not incur.

**\*\* We recommend that you download or print a copy of this document \*\***

**NOTE: In making an application you are agreeing to be bound by the contents of this document and policies.**

You may apply for all programmes via the website [www.sbmpartnership.org.uk](http://www.sbmpartnership.org.uk)

If you have any queries regarding the contents of this document, please e-mail either [sbmpartnership@serco.com](mailto:sbmpartnership@serco.com) (Serco team) or [sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk) (Adfecto team) in the first instance.

### **1. Eligibility for School Business Management programmes and units**

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#### **a) Applicants with school business manager experience**

As an applicant with school business management (SBM) experience you will either be:

- employed as a school business manager (or equivalent) within a state-maintained school, academy or early years setting
- employed as a school business manager (or equivalent) within an independent school (home or overseas) – refer to **sections 5 and/or 6** for details
- working for a local authority or the Department for Education with SBM responsibilities (and normally with a school identified where you can carry out work-based study)

#### **In addition:**

- for Level 5 Diploma programmes: applicants should be an experienced school business manager working closely with the senior leadership team (SLT) on a day-to-day basis

For the purpose of these programmes, the school business manager role is defined as undertaking or having experience of a combination of school finances, procurement, HR and marketing in your day-to-day work, at either senior administrator or management level.

**Please contact us if you need to discuss your eligibility for the most appropriate programme.**

#### **b) Applicants not working in a school or education setting ('aspiring')**

An aspiring SBM applicant refers to either an applicant not employed in a school/education setting, or an applicant based in education but outside an office, finance or administration-based role e.g. a school teacher, school governor, etc. We welcome applications from individuals currently operating outside the education sector but who now wish to pursue a career in school business management.

**Please contact us to discuss your situation if you want to clarify your eligibility as an aspiring applicant.**

School governors and those in other education-related roles may find their skills of relevance to school business management and would also find the Aspiring SBM programme a useful route for entry into the profession. Those with finance or business management experience in a non-educational setting would also be regarded as aspiring applicants.

It is highly recommended that aspiring applicants should attend an Aspiring SBM programme before applying for one of the full SBM programmes (see section 1.1 below).

### 1.1 Aspiring SBM applicants

The SBMP welcomes applications from individuals currently operating outside the education sector, or who are employed in the education sector but not in a finance or administration role, and who wish to enter the school business management profession.

Aspiring SBM applicants are highly recommended to join an Aspiring SBM programme which explores the challenging role of a school business manager and helps prepare participants for the successful study of the full Level 4 Diploma programme as well as providing key information on finding a link school. Please also refer to the Aspiring SBM FAQ document on our website.

Note that as an aspiring applicant if you continue your SBM studies and join a full SBM programme you will be required to identify a link/support school which is prepared to support you while you study. You do not need a link school to study the Aspiring SBM programme itself.

**Aspiring SBMs should note** that the activities and assessment within the Level 4 Diploma and Level 5 Diploma are school-centred and based on the knowledge and skills that a school business manager requires in a state-maintained school. If you successfully apply for a place on the programme you will be required to complete your studies within these parameters.

You must therefore provide details of the support school within the relevant application form. If details have not been confirmed at application stage you must advise us separately before starting the programme. This is an eligibility requirement and failure to do so will affect your place on the programme.

### 1.2 Costs for aspiring applicants

The Aspiring SBM programme costs are indicated on our website [www.sbmpartnership.org.uk](http://www.sbmpartnership.org.uk). Should you then wish to continue your studies by applying to join the full Level 4 Diploma, you will be required to pay the full cost of the programme (there is no reduction for having completed the Aspiring programme).

Please visit [www.sbmpartnership.org.uk](http://www.sbmpartnership.org.uk) for the next available aspiring programmes and support packages.

## 2. Applicant Responsibilities

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Please ensure that you understand all items within this section and adhere to the requirements throughout the programme or unit(s)

If you wish to study one of the SBM programmes or individual units, you must have the support of your headteacher/ executive headteacher, chair of governors and (where applicable) your immediate line manager. As part of the application process for each programme we will ask you to confirm that you have the support of your headteacher and chair of governors, and it is possible that we may ask you for verification of such support.

If you are an Aspiring SBM participant and continue onto one of the full SBM programmes or units, you will then require a link school that will provide you with access to staff and school information. You must provide details of the support school to meet eligibility requirements.

In the case of Pupil Referral Units, the confirmation of support should be provided by the chief executive of the Unit.

Note: If you are studying an Individual Unit, then you will still require the support of a school in order to complete your study activities.

Your success on any programme or unit (s) will depend upon the support and mentorship you will receive from the leaders in your supporting school as well as your programme facilitator.

More detailed information to assist headteachers and governors can be found in the document *Information for Headteachers and Chairs of Governors* available on our website.

If you wish to retract your application before accepting a place then you must email the Adfecto SBM team at [sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk) immediately to do so. If you wish to apply again at a later date, you will need to complete a new application form.

### 3. Participant Responsibilities

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You or your school/employer will be invoiced in advance for the full cost of the programme or unit(s).

You must ensure this invoice is paid upon receipt (and **within 14 days** at latest). Failure to pay an invoice will result in you being withdrawn from the programme, unit(s), workshop or other training course. (Also see section on Invoices below).

A staged payment option may be available for full programmes only - see the downloadable price list or our website for details.

**Should you withdraw early from a programme or unit(s) for any reason, the full cost of the programme or individual unit(s) must still be paid. Please refer to the Withdrawal section below for full details of charges.**

You are required to inform us a minimum of 2 weeks prior to any face-to-face session/workshop if you are unable to attend. If you fail to do so any late cancellation costs for the venue along with daily delegate costs will be passed on to you. Please be aware that these costs can be significant.

You are required to update your facilitator, and the Adfecto SBM team: [sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk) of any issues you experience with completion of work.

You must ensure that you have regular access to the primary email address you confirmed during the application process (including during school holidays).

#### 3.1 Confidentiality

Please respect the confidentiality of your study group. Matters discussed in study group online communities and face-to-face events should remain private to the group and not be shared with wider audiences without prior consent.

You will be asked to conduct work-based study within the school. This element of the programme has been designed to develop your skills and benefit your school. Therefore colleagues and leaders in the school that is supporting you must be aware of the implications of your involvement in the programme.

#### 3.2 Time management

You must be able to commit the time to study. The Level 4 and 5 SBM programmes are offered as **blended learning** programmes (online learning supported by regional face-to-face workshops) or **fully online** programmes, depending on availability (Level 5 currently only available in fully online format). We also offer some units for individual online study (conditions apply).

You will need to be able to manage your time in order to study at home and complete study within the workplace. Suggested study times are found in the programme FAQ guidance documents.

Whilst completing the programme you must adhere to assignment response deadlines set by the **Adfecto National Programmes Team**. If you are unable to meet any timescales for delivery of work you must communicate beforehand with Adfecto and agree a course of action:

E: [sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk)

**Note:** These are self-study programmes. Our learning groups are led by facilitators. A facilitator helps participants and groups to 'find answers' to their questions and to 'guide' learning rather than simply 'telling them the answers' as a tutor would typically do.

You will be required to conduct your own research into subjects relevant to school business management and will need to be able to motivate yourself and direct your own learning. The programmes are demanding and have been designed to challenge your thinking. You will at times be required to explore these challenges on your own, although you will have the support of your school mentor(s), facilitator and other participants.

For participants from the independent sector or based in overseas schools, please contact us for additional guidance that may be available (see also section 6 below).

### 3.3 Feedback

Participants of the SBM full programmes and units are requested to complete evaluation questionnaires at different stages of the programme to help inform programme development. End of programme questionnaires are available for completion online. Hard copy evaluation forms for workshop sessions are normally issued at face-to-face events.

If you are approached by another party to comment on your participation in the programme, or any work you have conducted whilst on it, we ask that you advise us of this.

The programme materials remain the intellectual property of the SBMP and we require you not to use them or share them for anything other than your programme of study.

## 4. Options for assistance with financing studies

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There are currently no formal options for financial assistance with these SBM programmes. Note that apprenticeship funds (levy funds) cannot be used for the programmes covered within these T&Cs. Apprenticeship SBM programmes are offered separately – see [www.serco-education.com](http://www.serco-education.com) for information on these.

## 5. Applications from Outside England

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SBM programmes have been written and designed for the English profession. We encourage applications from school employees outside England, including from overseas, but wish to advise that some contextual difficulties may arise for schools operating outside the English system.

In order to successfully complete the SBM programmes you will need a support school if your school does not offer the English curriculum. Even then, you may find that the financial arrangements within your school differ from those of a state-maintained school making it difficult to respond to some of the assignments (see also note on guidance information in section 6 below). Note that all fees are payable in sterling.

Please contact us for further information if you are an overseas applicant.

## 5.1 Applications from applicants in Wales

Please note that we may offer Level 4 and 5 programmes and units for school business managers, and others, based in Welsh schools. Should you be based in Wales, then normally you will automatically be recruited onto these specific programmes of study based in Wales unless you inform us otherwise. At present these programmes are only offered through the English language (subject to numbers). Please contact us for the latest options.

## 6. Applicants from the Independent Sector

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Programme materials are designed around the maintained sector in England, but we do attract a number of participants from the independent sector seeking to gain a recognised, professional qualification.

If you are a participant from the independent sector, please note that some assessment tasks will be centred on practice within the maintained sector and a guidance document will suggest how you can approach these tasks. Some of these questions can also be answered from the perspective of independent schools. The separate guidance document is available once you start the programme.

Note: The guidance information is also useful for overseas participants.

If you are an applicant from an independent school, or an overseas applicant, we recommend that you discuss your application with us first.

## 7. ICT Requirements

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All programmes and unit(s) are essentially online, e-learning programmes supported by workshops (blended learning options only) and self-directed research and study. You should be familiar with using a computer and the internet. You will also need broadband internet access at home or at work (preferably both).

You will be given access to the relevant e-learning area on the Serco Education learning platform [www.leadershiplearningcentre.com](http://www.leadershiplearningcentre.com) which is where you will access your learning materials, resources and activities.

Note that the learning centre is **optimised for desktop or laptop computers**. We cannot guarantee compatibility with tablets or smartphones. Please refer to our online Technical Specifications page (see separate FAQ tab on learning centre website) for further details. All studying and assignment submissions are designed to be carried out through a desktop or laptop device.

Pop up blockers in your web browser should be either disabled or configured to allow the opening of pop ups from the learning centre website [www.leadershiplearningcentre.com](http://www.leadershiplearningcentre.com).

You must ensure that your email address is entered accurately onto the application form as all communication relevant to your application will be made this way. It is your responsibility to provide a valid and functional email address for yourself. If your email address changes, you must update it as soon as possible by logging on to 'My profile' on the learning centre site. You must ensure you have regular access to the primary email address you confirmed during the application process (including school holidays).

It should be noted that some email mailboxes apply automatic filters to bulk or group e-mails. We will sometimes notify participants of course information via group emails so please add [sbmpartnership@serco.com](mailto:sbmpartnership@serco.com) and [sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk) to your 'safe senders' list (or equivalent) to allow our emails to reach you.

## 8. Participant Costs

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Current SBMP prices can be found on our website [www.sbmppartnership.org.uk](http://www.sbmppartnership.org.uk). A printable price list is available to download on the site. Prices are subject to change, so please ensure that you always refer to the latest published price list. All programmes and individual units are offered subject to final applicant numbers.

Please note that if you need to **resubmit an assessment** for a *second* time, or more, then resubmission fees will apply. Charges will also apply if you wish to re-attend a face-to-face workshop.

ILM accreditation is included within the price for the full Diploma programmes (from 2018) and available as an optional additional cost for individual units.

### 8.1 Invoices

You will be invoiced by Serco (on behalf of the SBM Partnership) for the full cost of the programme, individual unit(s) or other training package once you have formally accepted your place on a programme or unit. Invoices are emailed 2 to 4 weeks before the start of a programme, individual unit or other course.

Applicants should ensure that invoices are paid quickly (14 days payment terms) to avoid delays in starting the programme.

Participants will only be granted access to the learning centre and to start a programme if the SBMP has received payment.

The SBMP does not reimburse expenses in relation to travel to or from any training venue.

### 8.2 Invoice surcharges

A £50 administration fee will be applied to an invoice if an applicant requests late changes to their payment options after these have been confirmed by returning your offer letter accepting a place (excludes unavoidable amendments such as change of school).

Split invoices to different 'customers', e.g. the school and the participant, will also be surcharged (at same rate as the two-staged payment option)

### 8.3 Two-staged payment option

If you have elected to pay for a full SBM programme in two staged payments, then we will invoice for the first payment approximately 2 to 4 weeks in advance of the programme start, and for the second payment approximately midway through the programme.

The two-staged payment split will be a 60:40 split for relevant programmes.

**Note: Participants who are paying in two stages and who defer from a programme (before the second invoice is issued) will be invoiced for the second stage payment shortly before they resume their studies.**

## 9. Individual Units

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Selected individual units for Level 4 Diploma can be studied separately (subject to availability) but in order to achieve the full qualification you will need to enrol onto the full programme at some point. You cannot complete the full qualification by studying individual units alone.

### 9.1 Individual Unit pricing

If you study one individual unit, e.g. Level 4 Individual Unit, and then register for the full programme, we will deduct a proportion of the full unit price you have already studied from the cost of the full programme but you must start the full programme within 12 months of starting your unit.



If you study **more than one** unit and then decide to complete the full programme, we will deduct only a proportion of the cost you have already paid. You must start the full programme within 12 months of starting your most recent individual unit though. Please contact us for details and prices.

## 9.2 Individual Unit time limit

If an individual unit is to count towards your final Level 4 Diploma qualification then you must complete the full programme within 3 years of starting your individual unit. This is an ILM requirement.

## 10. Deferrals

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If, once started on a programme, or unit(s), **you find that you need to defer your place, please contact the Adefcto SBM team, E: [sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk)** in the first instance to discuss your options.

We will endeavour to arrange a deferred place but you must resume your studies **within 12 months from deferring**. You may only defer your place once and you will be required to complete a Deferral Form to formalise the process.

### 10.1 Grounds for deferral

All deferral requests will be considered on an individual basis but a deferral is likely to be favourably considered where one or more of the following circumstances apply:

- You are on maternity or long-term paternity leave
- You are seriously ill
- Family bereavement
- Significant family illness
- Change of job/school

Please note that the demands and pressure of work for events such as Ofsted (and Estyn) inspections are not normally sufficient grounds for deferral.

### 10.2 Effects of a deferral

Should you wish to defer from a programme or individual unit (s), the following conditions will apply:

- The SBMP reserves the right to reclaim costs incurred for face-to-face session dates where the appropriate notice of 2 weeks has not been provided.
- Materials are subject to change and the onus is placed upon the deferred participants to refresh their knowledge in updated unit areas.
- You will be unenrolled from your current e-learning and forum areas until you resume your studies
- If you defer from a programme but then later decide to withdraw (before or after infilling), our normal withdrawal charges will apply (see Table 1 below) and will be calculated on the original -intake you had accepted a place on.

### 10.3 Rejoining a programme or unit(s)

Participants who have been granted a deferral have a maximum of 12 months to rejoin the programme or unit(s). In the event that this deferral period is exceeded, participants will be automatically withdrawn and will need to reapply for the programme in the future. Participants who are withdrawn are still liable to pay programme/unit(s) costs and will be treated as if they have withdrawn.

Once you have formally accepted an opportunity to infill back into the programme you are unable to defer again. Should you fail to submit the associated work by the set deadline, you will be withdrawn from the programme immediately.

#### 10.4 Fees and charges (deferrals)

Participants will not incur a fee for deferring from the programme unless venue costs are incurred due to short notice for any of the blended learning options.

If you defer before the midway point of a programme, and have elected to pay fees in two stages, but have not yet been invoiced for the second instalment, you will be expected to pay the second instalment **before you resume your studies again**.

#### 10.5 Requesting a deferral

Should a deferral be requested, the following procedure will apply:

- You will be required to complete the formal deferral paperwork which can be obtained by contacting Adfecto.
- All requests must be completed and returned within **7 days**
- Failure to return the form within this timeframe will result in your withdrawal from the programme with immediate effect and you will be liable for the full cost of the programme.
- Your deferral paperwork will be processed internally and you will be notified as to whether your request has been approved within 7 days.
- Any outstanding invoices are still payable. By deferring, this allows you to re-join the programme at the stage you left and so complete the qualification.
- The SBMP will then contact you with opportunities to infill at the appropriate point. If you have opted to pay by the two-staged payment method, then you will be invoiced for the second stage when you rejoin the programme.
- Once your deferral has been confirmed, your status as a participant remains as a member of your **original** intake until you have formally accepted a place to infill onto another intake. If you Infill and then decide to Withdraw, withdrawal charges are based on your original intake
- Withdrawal charges are based on the starting programme schedule, not any subsequent schedule changes caused by deferring and infilling.

## 11. Withdrawal Policy

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### 11.1 Withdrawing before acceptance of a place (application withdrawal)

Should you wish to withdraw before your application has been accepted and registered, your application will be deleted. If you wish to apply again at a later date, a new application will need to be completed. Your new application will be considered within the next allocation process and will not be given elevated status within that process. No charges apply.

### 11.2 Withdrawing after acceptance (withdrawal from programme/ Individual Unit)

A few weeks before the start of your programme or individual unit you will receive a formal Offer Letter, sent by Adfecto via email. You must sign and return this formal offer letter to Adfecto to accept and confirm your place on the programme or unit. The signed Acceptance Form also confirms your formal acceptance of the SBMP Terms & Conditions.

If you have accepted your place and then decide you wish to withdraw from the programme, you are considered to be an active participant on the programme and so withdrawal fees will be applied. Refer to Withdrawal Fees table below.

At this stage (i.e. once you have formally accepted a place on the programme) you may have been given access to the programme materials; groups, facilitators and learning pathways will have been set up (plus venue arrangements made, if relevant); in addition, account details will have been recorded and invoices prepared and sent out.

If your circumstances change or you are experiencing serious difficulties once study activities have started, then you should discuss this with the SBMP immediately, who may be able to find an alternative course of action to withdrawing.

- A **withdrawal** means that you wish to leave the programme / unit entirely and do not wish to re-join at a later date. Charges apply (see table below).
- A **deferral** means that you wish to leave the programme / unit temporarily and intend to resume at a later date as specified by the SBM Partnership to complete the programme/ unit. Any outstanding invoices are still payable but a deferral allows you to re-join the programme at the stage you left.

If you still feel it is in your best interest to withdraw or defer, then you must complete and sign a withdrawal/ deferral form and return it to us within 7 days. Withdrawal/ deferral forms are issued by the Adfecto SBM team.

### 11.3 Effects of withdrawing

- If you withdraw, membership of the Serco learning centre website will be cancelled
- If a withdrawn participant wishes to re-join the programme at any time, they will need to re-apply and will be charged the full programme price.
- Withdrawal and/ or cancellation charges will apply

If you fail to follow the deferral/withdrawal policy the SBMP has the right to contact your supporting school's headteacher for further information.

If a participant wishes to withdraw for reasons other than a serious medical condition or long-term dependency care, **the SBMP will apply a withdrawal charge based on the table below**. The withdrawal costs for each of our programmes and individual units are detailed below in Table 1.

The Withdrawal timescales (Table 1) apply to the original (initial) intake a participant has formally accepted a place on. Withdrawal charges for Infill participants are calculated from their original intake dates and not from their Infill intake dates.

See next page for Withdrawal Charges table.

**Table 1: Withdrawal charges** (after initial formal acceptance of a place)

| Programme                      | 15-28 days notice before start<br>(Induction start date) | 14 days or less notice before start<br>(Induction start date) | Withdrawal within 6 weeks of programme/ IU start<br>(Induction start date) | Withdrawal after 6 weeks of programme/ IU start<br>(Induction start date) |
|--------------------------------|--|---|--|---|
| Aspiring SBM Programme (WebEx) | £50  | £100  | £200 (before 2 <sup>nd</sup> WebEx)  | £347 (from 2 <sup>nd</sup> WebEx onwards)                                 |
| Level 4 (Blended Learning)     | £150   | £250  | £550   | £1,644  |
| Level 4 (Fully Online)         | £150   | £250  | £400   | £1,448  |
| Level 4 (Individual Units)     | £50 per unit   | £75 per unit  | £150 per unit  | £363  |
| Level 5 (Fully Online)         | £150   | £250  | £550   | £1,700  |
|                                |  |   |  |   |

*Prices shown exclude (but are subject to) VAT*

#### 11.4 SBM Partnership enforced withdrawals

Participants can be forced to withdraw from a programme or a modular scheme if they fail to pay outstanding invoices (14 day payment terms) from the SBMP.

The SBMP can enforce the suspension or withdrawal of a participant if the individual is:

- Intoxicated at face-to-face sessions, displays disruptive, aggressive or other inappropriate behaviour towards other participants on the programme or the wider programme delivery team.
- Uses disruptive, aggressive or other inappropriate language or comments towards other participants or facilitators within learning centre online forums (or within any other forms of electronic communications).
- The SBMP can also withdraw a participant if, after discussions with the participant, the participant fails to submit required work by the agreed deadlines.
- If the participant has requested a withdrawal or deferral and we do not receive the completed withdrawal/deferral form within 7 days, the SBMP will assume that the participant does not wish to be involved in the programme/unit(s) any longer. Therefore, in this instance, the participant will automatically be withdrawn from the programme/unit(s), even if the original request was to defer.
- If participants have agreed to infill following previous deferral and either do not attend agreed face-to-face events or submit work by the required deadlines.

Should a participant be forced to withdraw for the above reasons they are liable for the full cost of the programme plus administration costs. ("Full cost" refers to advertised cost of programme/unit or full pre-payment received by Serco).

**NOTE: In making an application you are agreeing to be bound by the content of these Terms and Conditions.**

## 12. Cancellation Policy

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You are required to inform us a *minimum* of two weeks prior to any face-to-face session if you are unable to attend. If you fail to do so the late cancellation costs for the venue will be passed on to you. Please be aware that these can be significant.

If you withdraw after starting a programme or unit you may be liable for additional cancellation costs (over and above any course fees already paid) of £100.

## 13. Payment Methods

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Once an application has been confirmed, you (or your school/employer.) will be invoiced for the full amount, payable in advance of the start of the programme or unit(s). Payments can be made by BACS transfer or by cheque, details are included on your invoice. We also accept credit/ debit card payments once you have received a Serco invoice (full details about how to pay are provided on our invoices).

If you have elected to pay for a full programme in two, staged payments (60:40 split), then we will invoice for the first payment in advance of the programme start, and for the second payment approximately midway through the programme.

We will require your accounts payable details during the application process (or you must advise Serco of details **within 3 working days** of your application). Applicants should ensure that invoices are paid promptly to avoid delays in starting the programme.

Note: participants will only be allowed to start a programme once payment has been received.

## 14. Information Security

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As a user of the Serco learning centre web platform [www.leadershiplearningcentre.com](http://www.leadershiplearningcentre.com), you are responsible for all the activities that occur under your login and password and for keeping your learning centre password confidential at all times. You will be required to set a security question at registration stage and this will be used to verify your details, together with appropriate checks, should you need to re-set your password.

You will be enrolled onto the relevant course pathway before the programme/ unit start date and will be unenrolled from the course (and forum area if applicable) usually soon after the finish of a programme or unit. You will remain registered on the learning centre site after you finish a course.

If you defer or withdraw you will be unenrolled from the e-learning and forum areas.

Once you have completed a programme you will automatically be unenrolled from the relevant e-learning and forum areas on the Learning Centre web platform (typically within two months after all participants have completed).

If you suspect or are aware of any breach of your account, contact the learning centre web team immediately (01452 930 300 office hours) or email [learningcentre.info@serco.com](mailto:learningcentre.info@serco.com)

You can update your email address or password by accessing your My Profile area on the Learning Centre. Required fields are shown by a red asterisk (please do not attempt to change other pre-defined settings that may be displayed under My Profile).

## 15. Copyright

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Website content and programme materials are the intellectual property of Serco and its partners. Duplication or sharing of any content or materials with any third parties not directly involved in the programmes or services provided by Serco or its partners is prohibited. See our online [Copyright Notice](#) for further details.

## 16. Personal Data

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We will store your personal details securely at all times and keep them on file for the duration of the programme and for purposes of communicating any further relevant programmes to you afterwards.

In addition, your preferred email address and phone number may be shared with your facilitator for academic purposes only so that they can contact you regarding programme/unit activities.

## 17. Data Protection

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We have legal obligations, under the Data Protection Act (GDPR) (2018), to collect and process fairly any personal information that you provide to us. The SBM Partnership (Serco Education, Adfecto and ISBL) is fully compliant with these requirements.

Should you require accreditation of your programme or unit(s) of study by the Institute of Leadership & Management (ILM), or other accreditation body, we will also share your data with them.

If your school/ employer is funding (or part funding) your programme and specifically requests selected information from us, e.g. related to billing or general course progress, we may share relevant details with them at our discretion. Apart from the above, we do not otherwise share your data.

We do not pass on any personal data or contact details to any third parties for marketing purposes.

The SBM Partnership will store your personal details securely at all times and use it for monitoring recruitment information and site usage, for administering and delivering programmes, for billing purposes and for occasional, relevant communications concerning associated courses we may offer. You can opt out of this last process by emailing us once registered on a programme (include the text 'Unsubscribe' in your email header).

Academic records will be stored by the SBM Partnership for as long as records are deemed necessary for tax or academic purposes (such as requests for lost certificates or verification of historic qualifications), but no longer than 10 years from the end of your programme.

## 18. Completion

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Once you successfully complete an Individual Unit or a full programme you will receive a certificate issued electronically by the School Business Management Partnership.

## 19. Accreditation

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For the full Diploma programmes, the Institute of Leadership & Management (ILM) accreditation is included within the cost. ILM Diploma certificates are issued by the ILM once a participant has

successfully completed all the required units. ILM certificates are normally processed and issued 4 – 6 weeks after you have completed the programme.

## 20. Partnership Responsibilities

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**Serco Education** is responsible for new enquiries, applications, payments and management of the learning centre web platform (user queries, access, password resets and learning materials). For any queries please contact: [sbmpartnership@serco.com](mailto:sbmpartnership@serco.com)

**Adfecto** is responsible for offering places and managing all aspects of delivering programmes (including deferral and withdrawal process) once a participant has formally accepted a place on a programme or individual unit. Adfecto also send out final course certificates where applicable. For any queries please contact: [sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk)

All details and policies contained herein may from time to time be subject to change without notice as part of our normal programme and policy review process and therefore they should be regularly checked. The continued use of the site or a programme activity after a change has been made is your acceptance of the change.

Latest programme details and prices are available on the main website

[www.sbmpartnership.org.uk](http://www.sbmpartnership.org.uk)

Prices exclude (but are subject to) VAT

We recommend that you download or print a copy of this document together with the relevant programme FAQ guidance and a current price list. All are available online.

### Enquiries to:

Serco Education – pre-application, website registration and payment enquiries:

[sbmpartnership@serco.com](mailto:sbmpartnership@serco.com) T: 01452 930 300 (office hours),  
or

Adfecto – queries as you progress through a programme or unit:

[sbmpartnership@adfecto.org.uk](mailto:sbmpartnership@adfecto.org.uk) T: 01242 220684 (office hours)

| Version history  |            |   |           |
|------------------|------------|---|-----------|
| Version          | Date       | Reason for release / version update   | Issued by |
| V5<br>(210715)   | July 2015  | Withdrawal policy and charges revised; programme terminology updated to meet ILM requirements; glossary added; cancellation policy revised; staged payment conditions revised; eligibility criteria updated; deferrals and payment requirements updated.  | GL        |
| V6<br>(020915)   | Sept 2015  | Additional details relating to Round 3 (September 2015) NCTL scholarship funding applications and payments.   | AT        |
| V6.1<br>(141015) | Oct 2015   | Contact tel numbers updated. Additional point to 9.2 Deferrals; 8.1 split invoicing charges clarified.  | GL        |
| V7.0             | March 2016 | Accreditation details, programme labels and withdrawal fees for deferrals clarified.  | GL        |
| V8.0             | April 2016 | Section 9 Individual Units added. Notification of change to two-staged payment split for 2017 (section 8.2).  | GL        |
| V9.0             | July 2016  | Addition of School Business leader programme information. Confirmation of closure of NCTL scholarship funding scheme. Inclusion of Advanced Learner Loan scheme.  | GL        |
| V10.0            | Sept 2016  | Data Protection clause 17.1 inserted. ELC scheme included in section 4.   | GL        |
| V11.0            | March 2017 | Second stage payment due date clarified for infill participants. Additional information inserted for Advanced Learner Loans. Important changes to deferrals policy affecting certain programmes starting from May 2017 (section 10)<br>Clarification of status if changing from deferral to withdrawal. | GL        |
| V12.0            | April 2017 | 17.1: amendment to clarify position regarding disclosing participant information where a school/employer is contributing to the programme's cost.<br>Removal of out of date NCTL references. Minor text amends for clarification.   | GL        |
| V13.0            | July 2017  | Changes to deferrals process for participants starting in Autumn 2017, the result of the introduction of re-structured programmes for 2018.   | GL        |
| V14.0            | Nov 2017   | Revised to reflect new ILM Diploma programmes for 2018. Inclusion of section for independent schools applicants.  | GL et al. |
| V15              | May 2019   | Update phone numbers for Serco; removal of Advanced Learner Loan details as no longer available.  | GL        |

Issue date V15 - May 2019