

Level 5 Diploma in Operational Leadership & Management Skills (contextualised to schools)

Terms & Conditions

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1 - Introduction

The following is a contract between the applicant (you) and Serco Ltd.

The aim of this document is to provide you with information you need to know before applying for the Level 5 Diploma in Operational Leadership & Management Skills (contextualised to schools).

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.

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

You may apply for the programme via our website: [Level 5 Diploma in Operational Leadership and Management Skills](#)

If you have any queries regarding the contents of this document, please e-mail sbm@serco.com.

2 - Eligibility

The Level 5 Diploma in Operational Leadership & Management Skills helps existing leaders build the practical knowledge, confidence and strategic capability needed to lead effective school and trust operations.

As an applicant with school business management (SBM) experience you will be aged over 18 and 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)
- working for a local authority or the Department for Education with SBM responsibilities (and with a school identified where you can carry out work-based study)

3 – Applicant responsibilities

Please ensure that you understand all items within this section and adhere to the requirements throughout the programme.

Before applying for a place on the L5 Diploma in Operational Leadership & Management Skills, please ensure that you have the support of your headteacher/ executive headteacher, chair of governors and (where applicable) your immediate line manager. As part of the application process, 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.

Your success on this programme will depend upon the support and mentorship you will receive from the leaders in your school as well as your programme facilitator.

If you wish to retract your application before accepting a place, then you must email the Serco commercial programmes team at sbm@serco.com immediately to do so. If you wish to apply again at a later date, you will need to complete a new application form.

4 – Participant responsibilities

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

If timescales allow it, you must ensure this invoice is paid upon receipt (and **within 14 days** at latest). Failure to pay an invoice may result in you being withdrawn from the programme.

Note: Should you withdraw from the programme for any reason after the programme start, the full cost of the programme must still be paid. Please refer to the withdrawal section of this document. Please note that we cannot transfer the cost of the programme to another individual within your school or academy.

You are required to update your facilitator and the Serco commercial programmes team (sbm@serco.com) 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).

4.1 – Confidentiality

Please respect the confidentiality of your study group. Matters discussed in study group online communities 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. Colleagues and leaders in the school that is supporting you must therefore be aware of the implications of your involvement in the programme.

4.2 - Time management

You must be able to commit the time to study. The Level 5 programme is offered as a **fully online** programme.

You will need to be able to manage your time in order to study both at home and within the workplace.

Whilst completing the programme you must adhere to assignment response deadlines that have been set. If you are unable to meet any timescales / deadlines, please email sbm@serco.com to discuss and agree a course of action.

Note: The Level 5 Diploma in Operational Leadership & Management Skills is a self-study programme. 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 might 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 programme is demanding and has 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.

4.3 – Feedback

Participants to the L5 Diploma in Operational Leadership & Management Skills are requested to complete evaluation questionnaires at different stages of the programme to help inform programme development.

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 Serco and we require you not to use them or share them for anything other than your programme of study.

5 - Applications from Outside England

The Level 5 Diploma in Operational Leadership & Management Skills has 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 Level 5 Diploma in Operational Leadership & Management Skills 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. Note that all fees are payable in sterling.

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

6 - Applications from the Independent Sector

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.

7 - Programme Amendments, Postponement and Cancellation

7.1 - Programme amendment

We continually review and enhance our Programmes to ensure that they remain current, relevant, and of the highest quality. As a result, we may make changes to programme content, delivery methods, facilitators, schedules, learning materials, or other elements of the Programme from time to time.

Where significant changes are made, we will make reasonable efforts to inform participants in advance. Any changes will be designed to maintain the overall aims, quality, and learning outcomes of the programme.

7.2 - Programme cancellation

We reserve the right to cancel, postpone, reschedule, or combine a programme cohort where participant numbers have not reached the minimum level required for the programme to be

delivered viably. The minimum number of participants required shall be determined at our sole discretion.

In the event that a cohort is cancelled due to insufficient enrolment, affected participants will be notified as soon as reasonably practicable. Participants will be offered either:

- a place on a future cohort of the same Programme; or
- a full refund of any Programme fees already paid.

We shall not be liable for any indirect or consequential losses arising from such cancellation, including, but not limited to, travel, accommodation, loss of earnings, or other expenses incurred by participants.

8 - ICT Requirements

The Level 5 Diploma in Operational Leadership & Management Skills is an online, e-learning programme supported by 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 learning platform, BUD, which is where you will access your learning materials, resources and activities. You will also have access to THINQI, a platform you will be using for networking with other learners in your group and to ask questions to your group facilitator regarding key aspects of the programme.

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 inform us and update BUD as soon as possible. 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 sbm@serco.com to your 'safe senders' list (or equivalent) to allow our emails to reach you.

9 - Participant Costs

The programme's current price can be found on our website at [Level 5 Diploma in Operational Leadership and Management Skills](#). Please note that prices are subject to change, so please ensure that you always refer to the latest published price .

Please note that if you need to **resubmit an assessment** for a *second* or subsequent time, or more, then resubmission fees will apply.

ILM accreditation is included within the price for all ILM qualifications we offer.

9.1 - Invoices

You will be invoiced by Serco for the full cost of the programme once you have formally accepted your place on the programme . Invoices are generally emailed 2 to 4 weeks before the start of a programme.

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

Payment is accepted for the named participant only. We are unable to transfer the payment to another participant or refund a payment to the employer once the programme has commenced.

9.2 - Invoice surcharges

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

9.3 – Options for assistance with financing studies

There are currently no formal options for financial assistance with the Level 5 Diploma in Operational Leadership & Management Skills. Note that apprenticeship funds (levy funds) cannot be used for this programme.

10 - Deferrals

If, once started on a programme, or unit(s), you find that you need to defer your place, please contact sbm@serco.com 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 inspections are not normally sufficient grounds for deferral.

10.2 Effects of a deferral

Should you wish to defer from the programme, the following conditions will apply:

- 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 network until you resume your studies

10.3 - Re-joining the programme

Participants who have been granted a deferral have a maximum of 12 months to re-join the programme. 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.

Once you have formally accepted an opportunity to infill back into the programme you are unable to defer again.

10.4 - Fees and charges (deferrals)

Participants will not incur a fee for deferring from the programme.

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 sbm@serco.com.
- All requests must be completed and returned within **7 days**
- 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 Serco commercial programmes team will then contact you with opportunities to infill at the appropriate point.
- 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 - Withdrawals

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)

A few weeks before the start of your programme you will receive a formal offer letter via email. You must sign and return this formal offer letter to sbm@serco.com to accept and confirm your place on the programme. The signed Acceptance Form also confirms your formal acceptance of the Terms & Conditions.

We recognise that, on occasions, applicants may book themselves onto the programme and subsequently find themselves unable to continue. In these situations, we ask that you contact sbm@serco.com as soon as possible and complete a withdrawal request form.

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 the programme fees will not be refunded. Programme fees will only be refunded where a participant withdraws more than 5 working days before the programme start date. Please refer to section 11.5.

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; 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 Serco immediately, as we may be able to find an alternative course of action to withdrawing.

- A **withdrawal** means that you wish to leave the programme entirely and do not wish to re-join at a later date.
- A **deferral** means that you wish to leave the programme temporarily and intend to resume at a later date to complete the programme. Any outstanding invoices are still payable but a deferral allows you to re-join the programme at the stage you left.

If your employer has part or fully funded your programme, they have the right to request that you be withdrawn from the programme before you have successfully completed if we consider that you are not studying or making progress.

Should you leave your place of employment prior to successfully completing your studies, we are unable to refund your employer any part of the fees.

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 Serco commercial programmes team (sbm@serco.com)

11.3 - Effects of withdrawing

- If you withdraw, your BUD and Thingi memberships 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.

11.4 - Enforced withdrawals

Participants can be forced to withdraw from a programme or a modular scheme if they fail to pay outstanding invoices.

Serco can also enforce the suspension or withdrawal of a participant if:

- The individual displays disruptive, aggressive or other inappropriate behaviour towards other participants on the programme or the wider programme delivery team.
- The individual uses disruptive, aggressive or other inappropriate language or comments towards other participants or facilitators within online networks (or within any other forms of electronic communications).
- After discussions with the participant, the participant fails to submit required work by the agreed deadlines.

Should a participant be forced to withdraw for the above reasons they are liable for the full cost of the programme.

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

11.5 – Withdrawal charges

Withdrawal date	Serco charge
Before formal acceptance of place on programme	0% of programme fee
After programme start	100% of programme fee

After acceptance of place on the programme but within 5 working days of programme start date	100% of programme fee
After acceptance of place on the programme but 6+ working days before programme start date	0% of programme fee

12 - Payment Methods

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 - 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). **Please note that we are no longer able to accept payment by cheque.**

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.

13 - Information Security

As a user of the BUD platform, you are responsible for all the activities that occur under your login and password and for keeping your password confidential at all times.

If you defer or withdraw you will be unenrolled from both BUD and Thinqi.

Once you have completed a programme you will automatically be unenrolled from the relevant e-learning and network areas on BUD and Thinqi (typically within two months after all participants have completed).

If you suspect or are aware of any breach of your account, contact Serco at sbm@serco.com.

14 - Copyright

Website content and programme materials are the intellectual property of Serco. Duplication or sharing of any content or materials with any third parties not directly involved in the programmes or services provided by Serco is prohibited.

15 - Personal Data

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.

16 - Data Protection

We have legal obligations, under the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018, to collect and process fairly any personal information that you provide to us. Serco fully complies with these requirements. Serco's Privacy Notice is available at [Privacy Notice - Employment, Skills and Training from Serco](#).

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

Where your employer has funded your programme, we may share information regarding attendance, progress, achievement, deferral or withdrawal status with them for programme management and contract administration purposes. 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.

We 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 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.

17 - Completion

Once you successfully complete your studies, you will receive a certificate of completion issued by ILM.

18 - Accreditation

The Institute of Leadership & Management (ILM) accreditation is included within the programme 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.

19 - Limitation of Liability

Nothing in these Terms and Conditions shall exclude or limit our liability for death or personal injury caused by our negligence, for fraud or fraudulent misrepresentation, or for any other liability that cannot be excluded or limited by law.

Subject to the above, our total liability to any participant, employer, organisation, or other party arising out of or in connection with the Programme, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, shall not exceed the total Programme fees paid by or on behalf of the participant.

We shall not be liable for any indirect, consequential, special, or incidental loss or damage, including but not limited to loss of profit, loss of revenue, loss of opportunity, loss of anticipated

savings, loss of goodwill, or business interruption arising from participation in, cancellation of, postponement of, or changes to the programme.

Whilst we will use reasonable skill and care in delivering the Programme, we do not warrant that participation in the Programme will result in any particular qualification, accreditation, employment outcome, promotion, professional recognition, or other specific benefit.

Participants remain responsible for the application of any knowledge, skills, advice, or materials provided as part of the Programme and should seek independent professional advice where appropriate.

We reserve the right to amend these Terms and Conditions from time to time. Where changes are significant, we will make reasonable efforts to notify participants.

Enquiries to:

Serco EST – sbm@serco.com T: 0121 2815215 (office hours),

Version history			
Version	Date	Reason for release / version update	Issued by
V1	11/10/2026	Initial release	EMJ/RF