



The Wales Deanery Guide to Trainer Recognition

Edition 1.0 – October 2016



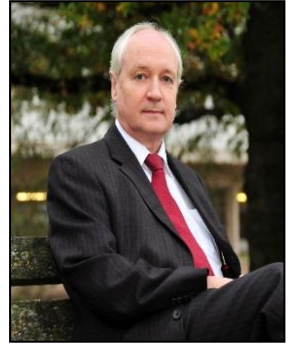
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Welcome and Foreword

Professionalising the role of Medical Educators has been high on the agenda for the Wales Deanery for many years, and I am delighted that the GMC now formally recognises the importance of this role in Medical Education.



This work stream has taken some time to come to fruition. I myself chaired the original PMETB working group back in 2009, which was set up to define the standards required of all those involved in teaching and training at undergraduate and postgraduate level. The GMC then took over this work and in conjunction with the Academy of Medical Educators, the standards for trainer recognition of the educational role came into being. These standards have only been formal since January 2016, but the Wales Deanery has been well ahead of the other administrations in the UK in publicising and ensuring our medical educators are fit for purpose. The Wales Deanery has also played a big role in supporting medical educators, not only with training courses but also in dialogue with the Health Boards/Trusts to ensure the proper protected time is given for education and training.

It has been known for many years that the hospitals that provide the best education and training can also show that they have the best clinical outcomes. This alone should place medical education and training at the forefront of any Health Board/Trust in ensuring the best possible patient care. **Trainees** are entitled to be supervised by individuals who teach well, who are engaged with their learning needs and support their development and progression. **Patients** are entitled to be attended to by doctors who are well taught, supervised and supported, meaning that they can therefore give them the best, and highest standards of clinical care.

Being a trainer can be a hugely enjoyable and rewarding experience. You will be contributing to ensuring high standards of training and ensuring excellent consultants and specialist trainees for the future. The Wales Deanery is committed to supporting its trainers and this guide provides an excellent resource for all those involved in medical education and indeed those who wish in the future to be involved in teaching and training. Wales is unquestionably ahead of the rest of the UK and the number of doctors who have already been signed up and recognised as trainers by the GMC is a reflection of the commitment shown by everyone to achieve these aims. I hope you find this guide useful. If you have any comments or feedback with regard to the guide please do not hesitate to contact the Wales Deanery at walesdeanerysre@cardiff.ac.uk.

Once again I am grateful for all the enthusiasm and support from our trainers.

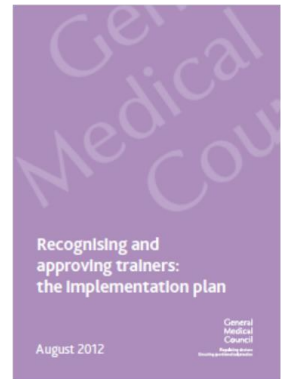
A handwritten signature in black ink, reading 'Prof. Derek Gallen'.

Professor Derek Gallen

Postgraduate Dean, Wales Deanery

Overview of Trainer Recognition and the GMC's Requirements

In August 2012, the GMC published its document '[Recognising and Approving Trainers: the implementation plan](#)' which provided details of its arrangements for the formal recognition of trainers in secondary care (and in primary care for those not accredited as GP trainers).



The trainer recognition process is a key component of the GMC's regulatory framework designed to provide assurance to patients and others that medical education and training produces doctors with the appropriate knowledge, skills and behaviours to enable them to provide a high quality service and ensure patient safety. It is anticipated that the formal recognition of trainers will improve the quality of training particularly in relation to:

- Trainers as positive role models, demonstrating good medical practice
- Teaching and feedback
- Assessment decisions
- The training and support of trainers

The arrangements apply to both postgraduate and undergraduate trainers as follows:

Postgraduate Trainers:

- Educational Supervisors
- Named Clinical Supervisors

Undergraduate Trainers:

- Those responsible for overseeing students' progress at each medical school
- Lead co-ordinators at each Local Education Provider

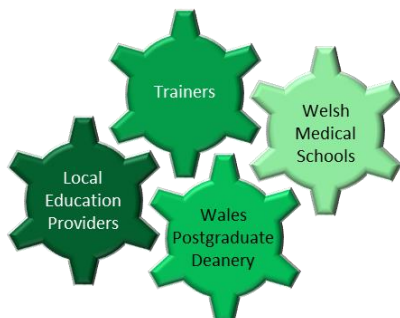
Please note that this guidance document is specifically aimed at postgraduate trainers (i.e. Educational Supervisors and Named Clinical Supervisors) however undergraduate trainers may also find some elements of it useful.

In time, the GMC hopes to secure legislative change so that the process of recognition becomes a statutory approval process as is the case in primary care.

In order for the Wales Deanery to recommend a trainer to the GMC for recognition, trainers must be formally identified and must then meet the recognition requirements set out by the Wales Deanery.

The GMC set a deadline of 31st July 2016, by which date all Deaneries/LETBs were required to identify and record the details of their trainers and to submit a list of trainers to the GMC for publication on its website.

The GMC plans to publish the names of recognised trainers on its website in early 2017. In future, the Deanery will be required to provide regular updates on its trainer data to the GMC to ensure that the published list of recognised trainers remains up to date.



Working together to promote excellence in postgraduate medical education and training across NHS Wales through the development, provision and support of high quality training.

The Wales Deanery's Approach to Trainer Recognition

The Wales Deanery is responsible for ensuring that all postgraduate trainers (i.e. Educational Supervisors and Named Clinical Supervisors) across NHS Wales are recognised as such.

The postgraduate trainer roles are defined by the GMC as follows:

Educational Supervisor: A trainer who is selected and appropriately trained to be responsible for the overall supervision and management of a trainee's trajectory of learning and educational progress during a placement or series of placements. Every trainee must have a named educational supervisor. The educational supervisor helps the trainee to plan their training and achieve agreed learning outcomes. He or she is responsible for the educational agreement and for bringing together all relevant evidence to form a summative judgement at the end of the placement or series of placements.

Named Clinical Supervisor: A trainer who is responsible for overseeing a specified trainee's clinical work throughout a placement in a clinical or medical environment and is appropriately trained to do so. He or she will provide constructive feedback during that placement. He or she will lead on providing a review of the trainee's clinical or medical practice throughout the placement that will contribute to the educational supervisor's report on whether the trainee should progress to the next stage of training.

Many trainers undertake both the Educational Supervisor and the Named Clinical Supervisor role either for the same trainee or for different trainees and there is a significant degree of overlap between the responsibilities and expectations as well as the support required by individuals in the two roles.

What is Expected of Trainers in Wales?

The Wales Deanery is committed to ensuring that all of its trainees experience a high quality of education and training in an atmosphere that is conducive to training so that they can provide excellent standards of patient care and ensure patient safety. As such, the Deanery is committed to recognising, valuing and supporting its trainers to undertake their educational role. In return, trainers are expected to promote and provide a supportive environment, free from discrimination or harassment, in which teaching and learning can take place.

It is recognised that many stakeholders are involved in the provision and support of medical education and training and, as such, trainers are required to work with others, including specialty leads and Faculty Leads, in order to ensure a coordinated and collaborative approach to the delivery and management of training, to resolve issues effectively and to share good practice.

Recognising Educational Supervisors in Wales

In order for Educational Supervisors in Wales to be recognised as such, they must sign up to the Educational Supervision Agreement (details of which can be found on pages 7 -11) and meet the requirements of it.

Recognising Named Clinical Supervisors in Wales

For the purposes of trainer recognition, the Wales Deanery considers all Educational Supervisors to be eligible to undertake the Named Clinical Supervisor role too and therefore records individuals who have signed the Educational Supervision Agreement as both Educational Supervisor and Named Clinical Supervisor in its trainer database. As such, Named Clinical Supervisors who also undertake the role of Educational Supervisor do not need to do anything additional to be recognised as a trainer.

With the exception of Named Clinical Supervisors based at either Aneurin Bevan University Health Board or Velindre NHS Trust, individuals undertaking only the Named Clinical Supervisor role are not currently required to

sign an Agreement. They are simply required to declare themselves as undertaking this role to their local Postgraduate Centre and the Wales Deanery so that their details can be added to the Deanery's trainer database. They will need to provide their full name, GMC number, hospital site, Local Education Provider, specialty and email address.

A Named Clinical Supervisor Agreement is being piloted at Aneurin Bevan University Health Board and Velindre NHS Trust from October 2016, so individuals undertaking only the Named Clinical Supervisor role at these organisations will be required to sign up to the Agreement which can be obtained from their local Postgraduate Centre.

Overview of the Trainer Recognition Process in Wales

The below chart is designed to provide a basic overview of the trainer recognition process in Wales. Further detail on the process is provided throughout this guidance document.

Educational Supervisors

The Educational Supervisor signs the Educational Supervision Agreement (ESA) and Terms of Understanding documents available from their local Postgraduate Centre.

The Educational Supervisor returns one copy of the signed Terms of Understanding document to the Wales Deanery, and the other to their local Postgraduate Centre whilst retaining the ESA for their own records.

Named Clinical Supervisors

The Named Clinical Supervisor declares that they are in this role to their local Postgraduate Centre and the Wales Deanery (except those based at Aneurin Bevan University Health Board or Velindre NHS Trust where a Named Clinical Supervisor Agreement is being piloted and will therefore need to be signed and returned).

Once the Deanery receives information that an individual is either an Educational Supervisor (via the receipt of a signed ESA), a Named Clinical Supervisor or both, the individual is recorded as such in Intrepid (the Deanery's trainer database) and they are provided with log in details to enable them to access Cardiff University's e-resources and the Self Accreditation Module in Intrepid should they wish to use this resource to record the CPD that they have undertaken. Their details are also sent to the GMC so that their name can be added to the GMC's list of recognised trainers.

The trainer must meet the requirements of the role including undertaking CPD relevant to the role and demonstrating appropriate attitudes and behaviours.

The trainer must provide evidence that they have met the requirements of the role in MARS so that this can be discussed as part of annual whole practice NHS appraisal.

If the requirements of the role are met

The trainer continues in the role.

If the requirements of the role are not met but the trainer wishes to remain in the role

The Deanery will liaise with the relevant Local Education Provider to establish the reasons for the requirements not being met. Where possible, concerns will be addressed and remediation may be put in place. If requirements are still not being met following this, an individual may no longer be able to undertake the role of trainer.

If the trainer wishes to relinquish the role

The trainer must notify both their local Postgraduate Centre and the Wales Deanery at the earliest opportunity and provide details of their name, GMC number, email address, location, specialty, the trainer role/roles that they wish to relinquish and the reasons for this. The individual will then be removed from the Deanery's trainer database and will no longer be eligible for recognition as a trainer by the GMC. This means that they will be unable to act as Educational Supervisor or Named Clinical Supervisor to any trainees.

Eligibility to be a Postgraduate Trainer

All Educational Supervisors and Named Clinical Supervisors must be doctors who have a clear, expressed interest in the training, assessment and development of postgraduate medical trainees.

The table below sets out the roles that an individual should be undertaking in order to supervise trainees at various levels of training.

Training Grade to be Supervised	Individuals eligible to undertake the role of Educational Supervisor or Named Clinical Supervisor
Foundation	<ul style="list-style-type: none">• A substantive Consultant• A staff, associate specialist or specialty (SAS) doctor with a Certificate of Completion of Training (CCT)• A staff, associate specialist or speciality (SAS) doctor without CCT
Core	<ul style="list-style-type: none">• A substantive Consultant• A staff, associate specialist or specialty (SAS) doctor with a Certificate of Completion of Training (CCT)• A staff, associate specialist or speciality (SAS) doctor without CCT
Higher	<ul style="list-style-type: none">• A substantive Consultant• A staff, associate specialist or specialty (SAS) doctor with a Certificate of Completion of Training (CCT)

Both the GMC and Wales Deanery guidance is clear that Locum Consultants will not normally be eligible to undertake the roles of Educational Supervisor or Named Clinical Supervisor. This is because, in general, locum posts are short in nature and individuals would therefore be unable to provide continuity of support and supervision to trainees.

It is possible however for exceptions to be made, depending on individual circumstances (e.g. if an individual has been and is expected to be in the locum post for a longer period of time). To request an exception, the following information must be provided to Dr Anton Saayman, Associate Dean for Postgraduate Education Support and Quality Improvement Skills Training via email to walesdeanerysre@cardiff.ac.uk. Exceptions will be considered on a case by case basis and the following information must be provided:

1. The length of time the individual has been working in the locum post.
2. The length of time the locum is expected to remain in the locum post.
3. The educational CPD that has been undertaken by the individual to date.
4. The reasons why it is believed that an exception should be made for the individual to be eligible to undertake the role(s) of Educational Supervisor or Named Clinical Supervisor.

Can an individual undertake both the Educational Supervisor and Named Clinical Supervisor role?

Yes. An individual can undertake the role of Educational Supervisor and Named Clinical Supervisor for the same trainee/trainees. Individuals can also act as an Educational Supervisor for a trainee/trainees and Named Clinical Supervisor for a different trainee/trainees and this is common practise in many specialties.

Must Educational Supervisors and Named Clinical Supervisors be based at the same location as the trainees whom they supervise?

Educational Supervisors do not have to be based at the same location as their trainees however they must have regular meetings as stipulated in the Agreement to ensure trainees' progress.

Named Clinical Supervisors are required to be based at the same site as their trainees in order to be able to meet the requirements of the role.

Skills, Knowledge and Experience Required by Postgraduate Trainers

The Wales Deanery has developed a Person Specification for Postgraduate Trainers which defines the primary skills, knowledge and experience which are considered necessary in order to successfully undertake either the Educational Supervisor or the Named Clinical Supervisor role and these are detailed below. The Person Specification is designed to provide clear criteria to individuals wishing to undertake the roles as well as to assist employers in selecting appropriately skilled individuals for the roles.

Skills/Abilities/Knowledge

Essential

- Understanding of the roles of Educational Supervisor and Named Clinical Supervisor
- Understanding of the importance of equality and diversity in the context of training

Desirable

- Understanding of human resource issues as they apply to trainees, including those with performance-related issues
- Knowledge and understanding of recent developments in medical education
- Knowledge of management and governance structures in medical education
- Awareness of key service and educational issues for the Local Education Provider
- Understanding of the use of information technology in education

Experience

Essential

- Previous experience of medical education and supporting trainees and trainers, for example as a Clinical Supervisor
- Consultant or Staff, associate specialist or specialty (SAS) doctor status within the Local Education Provider *

Desirable

- Quality improvement activity in the context of training

Qualifications

Essential

- GMC-registered medical practitioner in secondary care

Desirable

- Qualification in medical education, for example postgraduate certificate

Personal Qualities

Essential

- Enthusiasm for teaching and developing trainees
- Willingness to undertake the responsibilities of the role (including undertaking appropriate induction and training) as defined in the Educational Supervisor Agreement
- Commitment to CPD and willingness to provide evidence of this at appraisal
- Good communication, approachability and interpersonal skills

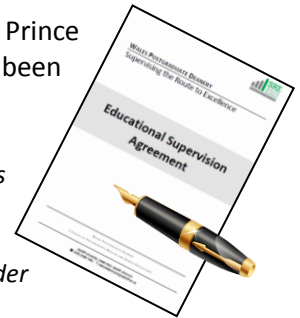
The Educational Supervision Agreement

What is the Educational Supervision Agreement (ESA)?

The Educational Supervision Agreement sets out the mechanisms for, and support of, the development and provision of high quality educational supervision in postgraduate medical education and training by defining the role, responsibilities and rights of three parties—the individual Educational Supervisor, a Local Education Provider and the Wales Deanery. It has been approved by BMA Cymru Wales and is recognised by NHS Wales. The Agreement is not a formal undertaking and there is no remuneration associated with it. Individuals will continue to be bound by their contract(s) of employment and job plan and doctors will also continue to be bound by the GMC's professional guidance on 'Good Medical Practice' and 'Leadership and management for all doctors'.

The Agreement was piloted at five sites (Ysbyty Gwynedd, Morriston, Prince Charles, Prince Philip and Withybush Hospitals) in 2011 to ensure that it was fit for purpose. It has now been rolled out across the whole of NHS Wales.

A copy of the ESA is provided in [Appendix 1](#) (*Note: The version of the ESA in the Appendix is for information purposes only and should not be used for signing and returning. Individuals who wish to sign up to the ESA should contact their local Postgraduate Centre where copies of the ESA that have been pre-signed by the relevant Medical Director from their Local Education Provider (LEP) will be available.*)



Why is the ESA required?

The Agreement is fundamental to enhancing the quality of postgraduate medical training in Wales by raising the profile and professionalising the role of the Educational Supervisor and ensuring recognition of the workload involved in supervising trainees and the resources required to support this. It aims to:

- Provide Clarity - To clearly define the roles, responsibilities and rights of those providing educational supervision and those supporting Educational Supervisors
- Improve Support - To ensure that Educational Supervisors receive protected time, resources and support to deliver their educational role, including increased recognition of the Educational Supervisor role within the Consultant job planning process and access to appropriate training
- Improve Recruitment - To raise the profile of postgraduate medical training in Wales thereby increasing its attractiveness as a graduate destination and improving recruitment

Who should sign the ESA?

All Educational Supervisors working in hospital-based Foundation, Core and Specialty training in NHS Wales (including flexible and less than full time training) must sign the ESA and meet the requirements of it in order to be formally recognised as such and be added to the GMC's register of recognised trainers.

The ESA does not apply to trainers in primary care as there is already a separate approval process in place for this cohort of trainers.

Educational Supervisors must ensure that they sign the ESA for the LEP for which they have a substantive contract (i.e. the LEP that does their job planning and NHS Appraisal). If an Educational Supervisor moves to another LEP within Wales, they must sign the ESA for their new LEP if they wish to continue acting as an Educational Supervisor.

Where can individuals get a copy of the ESA to sign?

Individuals wishing to sign up to the Educational Supervision Agreement should contact their local Postgraduate Centre which will have copies available for signature.

What happens once an individual has signed up to the ESA?

Once an individual has signed and returned a copy of the ESA to the Wales Deanery, they will be added as an Educational Supervisor to 'Intrepid', the Wales Deanery's trainer database and their details will be forwarded to the GMC for inclusion on the GMC's register of recognised trainers. Educational Supervisors must then meet the requirements of the role on an ongoing basis and provide evidence of this at annual NHS appraisal (see page 11 for further information on 'Requirements of the ESA').

Upon signing the ESA, Educational Supervisors will also:

- be provided with appropriate resources (including via job planning) and support to undertake this role in line with the responsibilities detailed in the Agreement.
- be provided with login details to enable them to access Cardiff University's e-resources.
- be provided with details of the Self Accreditation Module in Intrepid which they can use as a resource to record CPD if they wish (Note: the MARS appraisal process should be the primary method for demonstrating engagement with educational CPD).

How will the Deanery ensure that the ESA remains fit for purpose?

The Wales Deanery has conducted an evaluation of the ESA which considered how it is perceived by trainers; the impact it has had, and is expected to have, on training; and any issues that have arisen. This evaluation, which involved a variety of data collection mechanisms to seek the views of stakeholders, provided evidence that the majority of stakeholders (including Educational Supervisors themselves) believed that the ESA does help to professionalise the role.

The Wales Deanery remains committed to ongoing evaluation of the ESA, including its impact on the quality of training and ultimately patient safety, and welcomes feedback to ensure that it remains fit for purpose.

Benefits of the Educational Supervision Agreement

By signing the Agreement, trainers demonstrate their commitment to the role of Educational Supervisor and the development and provision of high quality supervision for training grade doctors as well as demonstrating to the Deanery provision of a suitable, supportive learning environment for trainees, including the potential for early detection of trainees with performance-related concerns. Ultimately, this will contribute to enhanced quality of patient care, leading to improved patient safety.

The Agreement also enhances communication and accountability between those responsible for delivering and supporting educational supervision and ensures consistency of approach to the role within and between Health Boards through clearer articulation of the rights, roles and responsibilities of those providing educational supervision and those supporting Educational Supervisors and Named Clinical Supervisors. This, in turn, ensures a uniform understanding across the Wales Deanery and NHS Wales.

The Agreement also contributes to raising the profile of postgraduate medical training in Wales, increasing its attractiveness as a graduate destination and improving recruitment and retention.

The key benefits of signing up to the Educational Supervision Agreement are provided below:

Benefits for Educational Supervisors

- Increased professional recognition of the role within the Consultant job planning process and NHS appraisal.
- Protected time allocated in job plans - Educational Supervisors should typically receive a minimum of 0.25 SPA per trainee supervised per week to deliver the role. Local Education Providers should recognise a need for flexibility in the allocation of time for the role in accordance with team or departmental requirements and the needs of individual Educational Supervisors. Additional time may be required to deal with trainees who require a significantly larger degree of support.

Note: If an individual is undertaking the role of Educational Supervisor and is receiving the appropriate sessional commitment for this, it is not anticipated that they will receive any additional sessional commitment for their Named Clinical Supervisor role.

- Access to appropriate resources including Cardiff University library services which includes access to an extensive collection of web-based e-resources including eJournals, eBooks and major databases such as MEDLINE, Cochrane and PsycINFO.
- Access to appropriate training opportunities.
- Support to undertake the role in line with the responsibilities detailed in the Agreement.

Benefits for Local Education Providers and the Wales Deanery

- Consistency and transparency around the provision of a single system of training supervision across Local Education Providers in Wales, co-ordinated and quality managed by the Wales Deanery on behalf of the Welsh Government and NHS Wales.
- The ability to provide evidence of meeting the requirements defined in the GMC's 'Standards for Trainers' and 'The Gold Guide', thereby enabling the Wales Deanery and Local Education Providers to meet statutory obligations.
- Supporting Local Education Providers and the Wales Deanery in their quality control activity as they support, manage, audit and resource the educational role of Educational Supervisors and Named Clinical Supervisors.

- Helping Local Education Providers demonstrate compliance with the Welsh Government's 'Standards for Health Services in Wales'.
- Increasing enthusiasm for, and uptake of, the role of Educational Supervisor among Consultants and recognition of a highly trained, motivated and supported cohort of Educational Supervisors throughout Wales who strive continuously for improvement in the quality of training.

Requirements of the Educational Supervision Agreement

The Educational Supervision Agreement (ESA) sets out the roles and responsibilities of an Educational Supervisor, a Local Education Provider and the Wales Deanery in supporting the delivery of high quality medical education and training.

A summary of the key requirements of each of the parties is outlined below.

Educational Supervisors

- To undertake CPD relevant to the trainer role in order to meet the CPD requirements set out by the Wales Deanery and provide evidence at appraisal (see 'CPD requirements' on page 12).
- To meet the attitudes and behaviours of a good trainer (as identified in the ESA) and demonstrate this via a variety of mechanisms (e.g. evidence from placement feedback forms, GMC survey results, trainee audits and critical incidents, multisource feedback forms, letters of thanks, teaching evaluation forms, etc).
- To have knowledge of, and comply with, the GMC's regulatory framework for medical training.
- To treat patients, colleagues and trainees with dignity, courtesy and respect at all times and promote a culture which is free from discrimination and harassment, taking into account the principles of equality and diversity.
- To participate in annual appraisal of the trainer role(s) as part of whole practice NHS appraisal (including providing evidence of meeting the CPD requirements).

Local Education Providers

- To ensure that job planning provides Educational Supervisors with time to carry out their educational role. (The time identified in a job plan will typically be equivalent to a minimum of 0.25 SPA per week per trainee supervised).
- To ensure that the educational supervision component of the role is included in both annual NHS appraisal and job planning.
- To support Educational Supervisors in accessing training and support for their role as a trainer (e.g. by ensuring the provision of appropriate leave to attend necessary training and by providing access to local faculty support structures and processes).

The Wales Deanery

- To ensure a database and system for recording trainer data across NHS Wales and to provide regular updates on trainer data to the GMC.
- To facilitate access to training opportunities to meet the requirements set out in the GMC's Framework Areas for Trainer Recognition.
- To provide support to Educational Supervisors through a variety of means including the Local Faculty Leads and Specialty and Foundation Training Schools.
- To implement quality management processes to monitor the compliance of Health Boards and Educational Supervisors in meeting the requirements for recognition.

Training and CPD Requirements and Opportunities for Trainers

As curricula content, assessment methods and expected outcomes change, skills and knowledge relating to the role of a trainer need to be revisited and updated on an ongoing basis. This is why the Wales Deanery's approach to trainer recognition requires a prospective commitment to ongoing professional development. It is part of a continuous process designed to support and encourage trainers in their practice as Educational Supervisor or Named Clinical Supervisor. This means that by committing to undertake the role of Educational Supervisor or Named Clinical Supervisor, individuals are also committing to undertaking relevant, ongoing CPD in relation to their educational role. As such, only CPD undertaken from the date on which the individual commits to the trainer role (e.g. by signing the Educational Supervision Agreement or by informing their local Postgraduate Centre and the Deanery that they are a Named Clinical Supervisor) will count as valid CPD for that year.

CPD Requirements

The CPD requirements for trainers have been set out by the GMC and relate to seven areas which have been drawn from the Academy of Medical Educators' 'Framework for the Professional Development of Postgraduate Medical Supervisors'. The seven framework areas are:

1. ensuring safe and effective patient care through training
2. establishing and maintaining an environment for learning
3. teaching and facilitating learning
4. enhancing learning through assessment
5. supporting and monitoring educational progress
6. guiding personal and professional development
7. continuing professional development as an educator

The CPD requirements for Postgraduate Trainers in Wales are set out in the table below:

	Minimum hours of CPD which must be undertaken in relation to the educational role per year*	GMC Framework Areas that the CPD must cover
Educational Supervisors only	8	All 7 Framework areas over a 5 year cycle (at least 2 Framework areas per year).
Named Clinical Supervisors only	4**	Framework areas 1-4 and 7 over a 5 year cycle.
Individuals who are Educational Supervisors and Named Clinical Supervisors	8	All 7 Framework areas over a 5 year cycle (at least 2 Framework areas per year).

**Note: a year runs from the date at which the Educational Supervision Agreement was signed or the date when a Named Clinical Supervisor informed their local Postgraduate Centre and the Wales Deanery that they are undertaking the role.*

*** Note: Under review.*

As Educational Supervisors and Named Clinical Supervisors make an individual decision to undertake the role and professionalise themselves accordingly, all individuals are required to undertake the full amount of CPD activity per year. Therefore if two individuals are undertaking the role of trainer as a job share, they must still both complete the full amount of CPD required per year.

What counts as valid CPD?

The Deanery has established a set of principles explaining the types of CPD activity valid to meet the GMC's requirements for trainer recognition:

1. CPD activity must be educational (rather than clinical) and relate to the trainer role.
2. CPD activity must be 'mappable' to one or more of the GMC's Framework Areas for Trainer Recognition (as set out on page 12).
3. Activity that falls within the remit of the trainer role (e.g. recruitment to training grade posts, participation in ARCP panels and undertaking educational activities and learning opportunities such as structured learning events (SLEs), etc) DOES NOT count towards meeting the CPD requirements for the recognition of trainers.
4. Preparation for activity that falls within the remit of the trainer role (e.g. researching a subject area for the delivery of a learning event that is 'mappable' to the GMC Framework Areas for Trainer Recognition) DOES COUNT towards meeting the CPD requirements for the recognition of trainers.
5. Membership of a professional body is considered to count as one year of CPD providing that it can be mapped to the GMC Framework Areas for Trainer Recognition.

Examples of activities that do and do not count towards meeting the CD requirements for the recognition of trainers is provided in the table below (this is not an exhaustive list):

Activity that DOES count	Activity that DOES NOT count
A course on how to develop induction programmes (Framework Area 1)	Attending clinical skills training (not educational CPD/does not relate to the trainer role)
A course on how to identify and plan learning opportunities' (Framework Area 2)	Appraisal skills training (trainers do not appraise trainees so this does not relate to the trainer role)
A course on assessing learning needs (Framework Area 3)	Training on how to use MARS (trainers do not appraise trainees so this does not relate to the trainer role)
A course on giving effective feedback (Framework Area 4)	Examiner for assessment/examinations (considered to be part of the trainer role)
A course on how to manage trainees in difficulty (Framework Area 5)	Involvement with recruitment of training grade posts (considered to be part of the trainer role)
Preparing for ARCP by reading the Gold Guide (Framework Area 5)	Sitting on an ARCP Panel (considered to be part of the trainer role)
A course on how to give careers support (Framework Area 6)	Any activity that took place before the cut-off date of 1st January 2013
Preparing to deliver a learning event (researching a subject area that is 'mappable' to the GMC Framework Areas for Trainer Recognition)	Delivering a course/study day/learning event (considered to be part of the trainer role)

For further information or advice in relation to valid CPD activity for the recognition of trainers please contact the Wales Deanery's Quality Unit at walesdeanerysre@cardiff.ac.uk.

Sources of CPD/training material

CPD and training opportunities can take many forms and can include (but are not limited to) face-to-face courses; full time/part time courses; distance learning/online courses; short courses/workshops; postgraduate award-bearing qualifications in medical education; and self-directed learning.

CPD events should have clear learning outcomes which are/can be mapped to the GMC's Framework Areas and many will have been formally accredited with CPD points granted through an approved educational accreditation system such as that of the Royal College of Physicians.

There are many sources/providers of CPD for trainers and some of these have been listed below. Please note that the list is not exhaustive and some external opportunities may reflect specific CPD requirements which may differ from those of the Wales Deanery. Further CPD and training opportunities may also be advertised on the Wales Deanery's web pages at <https://quality.walesdeanery.org/trainer-support/cpd-opportunities>.

Source/Provider of CPD	CPD Offered	Link to further information
Postgraduate Centres / Faculty Leads	May provide some local training opportunities.	Contact details for Postgraduate Centres can be found on pages 22 – 24.
Wales Deanery Medical Education Unit	Various courses and qualifications that may be of interest to trainers	https://meded.walesdeanery.org/meded-courses
Wales Deanery Medical Education Unit	'How to ...' series - a set of articles aimed at busy clinicians. The series provides a comprehensive overview of a range of educational topics in a readily accessible format.	https://meded.walesdeanery.org/how-to-guides A list of 'How To...' guides that new trainers may find particularly useful is provided on page 17.
Wales Deanery Careers Unit	Provides advice, guidance and training for trainers in relation to supporting trainees' with their career development	https://careers.walesdeanery.org/
Wales Deanery Professional Support Unit	Provides advice, guidance and training for trainers in relation to issues affecting trainees' progression through training	https://psu.walesdeanery.org/
Cardiff University School of Medicine	Provides a number of opportunities for professional development for trainers.	http://medicine.cf.ac.uk/medical-education/staff/staff-development/
Swansea University College of Medicine	Provides information on local and national resources to develop as a trainer.	http://medfaculty.swan.ac.uk/Home.html
Royal Colleges	May provide some training opportunities.	Contact your College Tutor for information, or visit http://www.aomrc.org.uk/ for a full list of Royal Colleges.
Academy of Medical Educators (AoME)	May provide national training opportunities.	http://www.medicaleducators.org/
National Association of Clinical Tutors (NACT)	May provide national training opportunities.	http://www.nact.org.uk

Source/Provider of CPD	CPD Offered	Link to further information
Association for the Study of Medical Education (ASME)	May provide national training opportunities.	http://www.asme.org.uk/
Association for Medical Education in Europe (AMEE)	May provide national training opportunities.	https://www.amee.org/home

Source/Provider of CPD	CPD Offered	Link to further information
E-Learning / Podcasts		
Wales Deanery E-Learning Modules	Offers e-learning modules in Educational Media & Technologies and Assessing Learning. The modules are elements from the Postgraduate Certificate in Medical Education which can be studied as stand-alone courses.	https://meded.walesdeanery.org/courses/e-modules-trainers
London Deanery E-Modules	Has a huge number of available e-learning modules relating to medical education, as well as topics such as Equality & Diversity, Workplace Assessments, Educational Research and Managing Trainees in Difficulty.	http://www.faculty.londondeanery.ac.uk/e-learning
East Midlands Deanery E-Modules	Offers e-learning modules relating to medical education.	https://www.eastmidlandsdeanery.nhs.uk/page.php?id=1512
Education and Training for Tomorrow (etft)	Offers generic, open access, interactive e-learning modules. Courses are designed for those providing training for doctors, medical students and pharmacists. They are suitable for doctors and other healthcare workers, such as nurses, who may be involved in assessing or providing feedback to doctors. Medical students and trainees may find them useful too.	http://www.etft.co.uk/

A list of suggested reading material that trainers may also find useful is provided in Appendix 2 on pages 33 – 34.

Recording CPD Undertaken

Trainers must record the CPD that they have undertaken in relation to their educational role and must be able to reproduce this evidence on request.

Trainers should use MARS (the Medical Appraisal and Revalidation System) to provide evidence (e.g. CPD certificates) to demonstrate that they are meeting the requirements of the trainer role to inform discussions around the trainer role(s) at annual whole practice NHS appraisal. As such, MARS has been developed to include the four recognised trainer roles, with individuals being able to select the role(s) that apply to them. Trainers will also be required to state in MARS whether or not they have met the requirements of the trainer role over the past year.

MARS is the primary mechanism for demonstrating engagement with the trainer role (including educational CPD) and will be used by the Wales Deanery to ensure that CPD requirements are being met. Trainers can also use the Self Accreditation Module within Intrepid (the Deanery's trainer database) as a repository to record their CPD.

Once an individual has been added to Intrepid as a trainer, they will be sent log in details to allow them to access the Self Accreditation Module if they choose to do so (trainers who already use Intrepid for applying for, or approving, study leave will already have an account in Intrepid which will allow them to access the Self Accreditation Module).

For further information on MARS, please contact the Deanery's Revalidation Support Unit at marswales@cardiff.ac.uk.

For further information on the Self Accreditation Module, please contact the Deanery's Information Management Team at selfaccreditation@cardiff.ac.uk.

Information and Support for New Trainers

All of the information in this guide is relevant to both new trainers and those who have been undertaking trainer roles for a longer period of time. The Deanery recognises however that new trainers may have specific development requirements that may need to be met more immediately in order for them to carry out the trainer role effectively from the time they take up the role.

As such, the Deanery is committed to providing induction for new trainers across Wales. It is anticipated that this guide will provide useful information that trainers will need to know when they take up their roles and will also provide signposting to other useful resources and CPD opportunities. In addition to this, the Deanery will host face-to-face induction events to which new trainers will be invited.

Heads of Specialty Schools, Specialty Training Committee Chairs, Training Programme Directors, Faculty Leads and Local Postgraduate Centres should also be able to provide a source of support to trainers in their specialties and locales.

Whilst all of the CPD opportunities listed on pages 14 - 16 are applicable to new trainers, a list of 'How To...' guides that new trainers may find particularly useful has been provided below (this is not an exhaustive list). The listed 'How To...' guides provide information on key skills required by trainers and include areas such as setting learning outcomes, teaching methods, providing and receiving feedback, undertaking assessment and supporting trainees in difficulty. A complete list of 'How To ...' guides is available on the Deanery's website at <https://meded.walesdeanery.org/how-to-guides> or on request from the Deanery's Medical Education Department at medicaleducation@cardiff.ac.uk or (029) 2068 7451.

'How To...' Guides

- [How To Plan Trainees' Learning as an Educational Supervisor, Stephen Brigley](#) (maps to GMC Framework Area 2)
- [How To Identify Learning Outcomes for Learning Agreements, Janet MacDonald](#) (maps to GMC Framework Area 2)
- [How To Develop Teaching Briefs and Plan Teaching Sessions, Janet MacDonald and Rhys ap Iwan Phillips](#) (maps to GMC Framework Area 3)
- [How To Teach in the Clinical Setting, Clive J Gibson](#) (maps to GMC Framework Area 3)
- [How To Develop Case Based Tasks and Scenarios, Janet MacDonald](#) (maps to GMC Framework Area 3)
- [How To Give Feedback in an Educational Setting, Peter Donnelly and Paul Kirk](#) (maps to GMC Framework Area 4)
- [How To Give Written Feedback, Dr Alan Stone](#) (maps to GMC Framework Area 4)
- [How To Obtain Effective Feedback on your Teaching, Dr Sue West-Jones, Dr Daniel Rigler, Dr Syed Hammad Hassan and Dr Joel Tay](#) (maps to GMC Framework Area 7)
- [How To Recognise and Support a Trainee with Performance Issues, L Walsh and S Davies](#) (maps to GMC Framework Area 5)
- [How To Support a Trainee with a Disability, H Payne](#) (maps to GMC Framework Area 5)

Where can trainers go for guidance, advice or support?

The Deanery and Local Education Providers are committed to supporting trainers in their roles. A list of contact details for sources of guidance, advice and support is provided on pages 22 – 24.

Sources of Support for Trainers

All trainers should be committed to their trainer role, invest appropriate time to the supervision of their trainees and maintain the skills and knowledge to do this. The Deanery and Local Education Providers are committed to providing support for trainers in this role. However, there may be times when trainers require additional or more specialist support.

Assisting trainees who may require additional support

Some trainers may find themselves responsible for supervising a trainee who may require additional support and this is likely to require more specialist knowledge and potentially more time investment. Trainers are often best placed to recognise that their trainee may require some additional support and will therefore require the skills and knowledge of how best to deal with this.

The Wales Deanery's Professional Support Unit offers a support service for all doctors and dentists in training whose performance may have been affected by a range of issues (e.g. health issues, progression in training, interpersonal skills, etc). The Unit offers advice, guidance and information regarding concerns to all parties involved in the management of postgraduate training. Trainees who may require additional support can either refer themselves or be referred by someone else to the Unit to discuss possible mechanisms for support that can be put in place for them.

The Professional Support Unit also provides workshops for both trainers and trainees. Workshops for trainers include topics such as recognising, supporting and managing trainees who require additional support.

For further information on the Professional Support Unit, visit <https://psu.walesdeanery.org/psu-homepage> or email professionalsupport@cardiff.ac.uk.

Additional support and advice can also be sought from Faculty Leads, College Tutors or Training Programme Directors who may have expertise or experience in providing additional support to trainees.

Supporting trainees in making career decisions

According to a survey entitled 'Medical Careers Advice and Guidance' conducted by the National Institute for Career Education and Counselling (NICEC) in 2014, trainers are one of the top five sources of careers advice for trainees.

The Wales Deanery's Careers web pages contain a wide range of tools, links and resources that may help trainers to develop a well-informed picture of the current landscape of medical careers and to provide ideas and structures for potential careers conversations with trainees. The web pages can be accessed by visiting <https://careers.walesdeanery.org/careers-homepage>

Alternatively, further information can be requested from the Deanery's Careers Unit at pgmedicalcareers@cardiff.ac.uk.

Trainers may also find the 'How To Support Trainee Doctors in Career Development' guide useful.

Guiding trainees through Foundation training

The Wales Deanery's Foundation School web pages provide advice, guidance and information on policies and procedures for trainers who have responsibility for supervising Foundation trainees. The web pages can be accessed by visiting <https://foundation.walesdeanery.org/foundation-homepage>

Further information or advice can also be sought from local Foundation Programme Directors whose contact details are online at <https://foundation.walesdeanery.org/trainers-0>

Alternatively, the Wales Deanery's Foundation School can be contacted directly by emailing foundationschool@cardiff.ac.uk or telephoning (029) 2068 7409.

Supporting trainees through Specialty training

Further information on the specialty training programmes within Wales can be found on the Deanery's web pages at <https://www.walesdeanery.org/specialty-training>

Appraisal of the Trainer Roles

How will trainers be appraised?

All postgraduate trainers working in NHS Wales will receive an appraisal for their trainer role. Provision of this appraisal is the responsibility of the Local Education Provider and it will be incorporated into an individual's annual NHS appraisal. Trainers have a responsibility to let their appraiser know which of the trainer roles they currently undertake. In order to do this, trainers must tick the roles that apply to them in the Medical Appraisal and Revalidation System (MARS).

Appraisal of the trainer role will include consideration of whether or not individuals are meeting the requirements of the role and are demonstrating appropriate attitudes and behaviours. As such, trainers must provide evidence in MARS of their commitment to, and achievements in, the education and training of trainee doctors (e.g. CPD certificates; trainee feedback; peer feedback; placement feedback; GMC survey results; teaching evaluation forms; trainer's own reflections on their performance; etc), be prepared to talk about their role as a trainer at their appraisal and provide evidence that they have met the CPD requirements. A statement will be included in MARS asking trainers to confirm whether or not they have met the requirements of the role.

What happens if the requirements of the trainer role(s) are not being met?

The GMC states that Deaneries must only recognise Educational Supervisors and Named Clinical Supervisors who they are satisfied meet the required standards. Therefore if it becomes apparent that a trainer is not meeting the required standards, the Deanery will liaise with the relevant Local Education Provider to establish the reasons for the requirements not being met. Where possible, concerns will be addressed and remediation may be put in place. If requirements are still not being met following this, an individual may no longer be able to undertake the role of trainer.

The Deanery has an obligation to establish procedures for appeals against decisions not to recognise individuals as Educational Supervisors or Named Clinical Supervisors, building on existing arrangements.

Relinquishing the Trainer Role

There will be occasions where an individual who is an Educational Supervisor or Named Clinical Supervisor no longer wishes, or is no longer able, to continue in their role as a trainer (e.g. no longer wanting to be a trainer, leaving Wales, retiring, etc). In these circumstances, individuals must notify both their local Postgraduate Centre and the Wales Deanery at the earliest opportunity and provide their full name, GMC number, hospital site, Local Education Provider, specialty, email address, the trainer role(s) that they wish to relinquish and the reasons for this. The individual will then be removed from the Deanery's trainer database and will no longer be eligible for recognition as a trainer by the GMC. This means that they will be unable to act as Educational Supervisor or Named Clinical Supervisor to any trainees.

What happens if a trainer moves to a different Local Education Provider (LEP) within Wales?

If a trainer moves to a different Health Board/Trust within Wales and wishes to remain in their role as trainer, they will need to inform both their local Postgraduate Centre and the Wales Deanery so that their Intrepid record can be updated accordingly. Educational Supervisors will also need to sign and return another copy of the Educational Supervision Agreement relevant to their new employing LEP (i.e. which has been signed by the employing LEP's Medical Director).

Circumstances where a trainer is unable to undertake the role (e.g. Fitness to Practice)

Doctors subject to investigation under the GMC's Fitness to Practise (FTP) procedures may continue to undertake the role of Educational Supervisor or Named Clinical Supervisor unless they are suspended or restricted from practising while investigations are continuing. Individuals suspended or restricted from practising will have to refrain from their role as an Educational Supervisor or Named Clinical Supervisor whilst awaiting the outcome of an investigation.

The employing Local Education Provider has a responsibility to inform the Wales Deanery accordingly, however it is also important for the trainer to inform the Wales Deanery in the unlikely event of not being able to fulfil their duties as an Educational Supervisor, especially if they have been suspended from clinical duties.

Further Information and Contact Details

For further information or support in relation to trainer recognition, trainers should contact their local Postgraduate Centre (details of which can be found below) in the first instance. Each Health Board/Trust has a Faculty Lead with responsibility for supporting trainer recognition who should be able to provide trainers with, or direct them to, appropriate support and advice.

Further information on the roles of Faculty Team members can be found on the Deanery's website at <https://quality.walesdeanery.org/faculty-teams>.

Alternatively trainers can contact the Wales Deanery as follows:

- For general queries around trainer recognition contact the Deanery's Quality Unit at walesdeanerysre@cardiff.ac.uk or (029) 2068 7491.
- For queries in relation to the Medical Appraisal and Revalidation System (MARS) contact the Deanery's MARS Team at marswales@cardiff.ac.uk or (029) 2068 7407 or visit the MARS website at <http://www.marswales.org/>
- For queries regarding Intrepid and the Self Accreditation Module contact the Deanery's Information Management Team at selfaccreditation@cardiff.ac.uk or (029) 2068 7439.

Information in relation to trainer recognition can also be found on the Wales Deanery's web pages at <https://quality.walesdeanery.org/trainer-support>

Postgraduate Centre Contact Details (split by Local Education Provider)

Abertawe Bro Morgannwg University Health Board		
Dr Ingo Scholler	Faculty Lead (Trainers)	ingo.scholler@wales.nhs.uk
Eve Jeffery	Medical Education Lead	eve.jeffery@wales.nhs.uk
Cefn Coed		
Emma Jones	Education Centre & Library Services Manager	emma.jones16@wales.nhs.uk
Morriston		
Marie Sheath	Postgraduate Education Manager	marie.sheath@wales.nhs.uk
Neath Port Talbot		
Jill Miles	Senior Medical Education Administrator	jill.miles@wales.nhs.uk
Princess of Wales		
Wendy Jones	Senior Medical Education Administrator	wendye.jones@wales.nhs.uk
Singleton		
Sarah Morris	Deputy Postgraduate Education Manager	sarah.morris6@wales.nhs.uk

Aneurin Bevan University Health Board		
Dr Yvette Cloete	Faculty Lead (Trainers and Trainees)	yvette.cloete@wales.nhs.uk
Lisa Cooper	Medical Education Manager (Nevill Hall) <i>Has responsibility for Trainer Recognition across the Health Board</i>	lisa.cooper2@wales.nhs.uk
Linda Coe	Head of Medical Education	linda.coe@wales.nhs.uk
Rosanna Carnevale	Deputy Head of Medical Education	rosanna.carnevale@wales.nhs.uk

Nevill Hall		
Lisa Cooper	Medical Education Manager (Nevill Hall)	lisa.cooper2@wales.nhs.uk
Royal Gwent		
Kerry James	Medical Education Manager (Royal Gwent)	kerry.james2@wales.nhs.uk
St Cadoc's		
Suzanne Burt	Medical Education Manager (St Cadoc's)	suzanne.burt@wales.nhs.uk
Ysbyty Ystrad Fawr		
Catherine O'Leary	Medical Education Manager (Ysbyty Ystrad Fawr)	catherine.o'leary@wales.nhs.uk

Betsi Cadwaladr University Health Board		
Dr Damian McKeon	Faculty Lead (West) <i>Leads on Trainer Recognition across the Health Board</i>	damian.mckeon@wales.nhs.uk
Central (Glan Clwyd)		
Dr Lee Wisby	Faculty Lead (Central)	lee.wisby@wales.nhs.uk
Deryn Evans	Medical Education Manager (Central)	deryn.evans@wales.nhs.uk
East (Wrexham)		
Dr Stephen Kelly	Faculty Lead (East)	stephen.kelly@wales.nhs.uk
Yvonne White	Medical Education Manager (East)	yvonne.white@wales.nhs.uk
West (Bangor)		
Dr Damian McKeon	Faculty Lead (West)	damian.mckeon@wales.nhs.uk
Jean Williams	Medical Education Manager (West)	jean.williams3@wales.nhs.uk
Generic Email Address for BCUHB (West) Postgraduate Centre		bcu.postgradwest@wales.nhs.uk

Cardiff and Vale University Health Board		
Dr Judith van der Voort	Faculty Lead (Trainers)	judith.vandervoort@wales.nhs.uk
Generic Email Address for Cardiff and Vale Postgraduate Centres		medical.education.cav@wales.nhs.uk
University Hospital of Wales		
Ceri Hill	Medical Education Manager (UHW)	ceri.hill2@wales.nhs.uk
Llandough		
Melanie Cotter	Medical Education Manager (Llandough)	melanie.cotter@wales.nhs.uk

Cwm Taf University Health Board		
Dr Peter Neville	Faculty Lead (Trainers and Trainees)	peter.neville@wales.nhs.uk
Dr Shakir Mustafa	Deputy Faculty Lead (Trainers and Trainees)	shakir.mustafa@wales.nhs.uk
To be appointed	Medical Education Manager	
Prince Charles		
Christine Hughes	Senior Medical Education Administrator - Postgraduate (Prince Charles)	christine.hughes2@wales.nhs.uk
Royal Glamorgan		
Rachel Heycock	Senior Medical Education Administrator - Postgraduate (Royal Glamorgan)	rachel.heycock@wales.nhs.uk

Hywel Dda University Health Board		
Dr Phil Avery	Faculty Lead (Trainers and Trainees)	phillip.avery@wales.nhs.uk
Jayne Noble	Head of Medical Education and Knowledge	jayne.noble@wales.nhs.uk
Bronglais		
Hilary Edwards	Medical Education Manager (Bronglais)	hilary.edwards2@wales.nhs.uk
Glangwili		
Carley Box	Medical Education Manager (Glangwili)	carley.box@wales.nhs.uk
Prince Philip		
To be appointed	Medical Education Manager (Prince Philip)	
Karen Evans	Deputy Medical Education Manager (Prince Philip)	karen.evans12@wales.nhs.uk
Mental Health/Learning Disabilities		
Nicky Pearce	Medical Education Manager (Mental Health/Learning Disabilities)	nicky.pearce@wales.nhs.uk
Rhiannon Davies	Medical Education Manager (Mental Health/Learning Disabilities)	rhiannon.davies@wales.nhs.uk
Withybush		
Erika Cowie	Medical Education Manager (Withybush)	erika.cowie@wales.nhs.uk

Public Health Wales NHS Trust		
Dr Brendan Healy	STC Chair and Training Programme Director - Medical Microbiology	brendan.healy@wales.nhs.uk
Dr Sian Griffiths	STC Chair and Training Programme Director – Public Health Medicine	sian.griffiths6@wales.nhs.uk

Velindre NHS Trust		
Dr Louise Hanna	Faculty Lead	louise.hanna@wales.nhs.uk
Sarah Fisher	Medical Education Coordinator	sarah.fisher2@wales.nhs.uk

Other useful links

- GMC's arrangements for trainer recognition: <http://www.gmc-uk.org/education/10264.asp>
- Academy of Medical Educators (AoME): <http://www.medicaleducators.org/>
- National Association of Clinical Tutors (NACT): <http://www.nact.org.uk/>
- Association for the Study of Medical Education (ASME): <http://www.asme.org.uk/>
- Association for Medical Education in Europe (AMEE): <https://www.amee.org/home>



WALES DEANERY

Supervising the Route to Excellence

Educational Supervision Agreement

Formerly known as the 'Educational Supervision Tripartite Agreement'



Wales Deanery ('School of Postgraduate Medical and Dental Education')
Cardiff University, Heath Park, Cardiff, CF14 4YS

☎ (029) 2068 7491 ✉ walesdeanerysre@cardiff.ac.uk 🐦 @WalesDeanery 📘 Wales Deanery

Summary of the Agreement

This document establishes an Agreement (in a form that is recognised by NHS Wales and complies with the General Medical Council's regulatory framework for training) between an Educational Supervisor (ES) (as defined in *Appendix 1*), a Local Education Provider (LEP) and the Wales Deanery to the mechanisms for, and support of, the development and provision of high quality educational supervision in postgraduate medical education and training. Accordingly, the parties agree to operate in accordance with the specific roles and responsibilities of the Educational Supervisor, Local Education Provider and the Wales Deanery defined in the Agreement.

Purpose of the Agreement

In August 2012 the General Medical Council (GMC) published details of new arrangements for the formal recognition of medical trainers in secondary care.¹ The GMC is working to secure legislative change so that the process of recognition becomes a statutory approval process as is the case in primary care. The new arrangements apply to all 'Named Educational Supervisors' – (henceforth referred to as Educational Supervisors) for postgraduate trainees. They will also apply to all 'Named Clinical Supervisors' (see definition on page 5) but the Wales Deanery does not require these trainers to sign this Agreement.

By signing this Agreement all parties are demonstrating their commitment to the important Educational Supervisor role and the provision of high quality educational supervision, as well as contributing to a suitable learning environment for trainee doctors, ultimately leading to improved trainee and patient safety and enhanced quality of patient care. The Agreement will also enhance communication and accountability between those responsible for delivering and supporting educational supervision. It will raise the profile of postgraduate medical training in Wales, increasing its attractiveness as a graduate destination and improving recruitment and retention.

The Agreement is fundamental to enhancing the quality of postgraduate medical training in Wales by raising the profile and visibility of the role of the Educational Supervisor and recognition of the workload involved in supervising trainees. Fulfilment of the Agreement should contribute to consistency and transparency around the provision of educational supervision across Local Educational Providers in Wales, co-ordinated and quality managed by the Wales Deanery on behalf of the Welsh Government (WG) and NHS Wales. It will also enable parties to provide evidence of meeting the requirements defined in the General Medical Council's (GMC's) 'Standards for Trainers'² and 'The Gold Guide'³ thereby enabling them to meet statutory obligations and will subsequently enable Educational Supervisors to become recognised trainers. In addition, this document will support Local Education Providers in their quality control activity as they support, manage and resource the educational role of Educational Supervisors, and will help them demonstrate compliance with WG's 'Standards for Health Services in Wales'⁴. It should be implemented unless reasons for any departure are clearly justified and explained to the Wales Deanery.

Scope of the Agreement

Recognition as an Educational Supervisor in Wales is dependent upon trainers signing this Educational Supervision Agreement and meeting the requirements of the Agreement. Signing the Agreement also confers recognition as a Named Clinical Supervisor. All signatories to the Agreement will continue to be bound by their contracts of employment. Doctors should also comply with the GMC's professional guidance on 'Good Medical Practice'⁵ and 'Leadership and management for all doctors'⁶. The arrangements for recognition of Educational Supervisors do not change the standards that trainers are expected to meet as set out in 'The Trainee Doctor'.

This Agreement relates specifically to the educational supervision of Foundation, Core and Higher postgraduate medical training (including less than full time training), but not training in General or Dental Practice. The Agreement does not encompass other roles relating to the management and delivery of postgraduate training including, but not limited to, Clinical Supervisor (Named or 'sessional'), Local Faculty Lead and College Tutor.

¹ General Medical Council - 'Recognising and approving trainers: the implementation plan' (August 2012)

² General Medical Council - 'The Trainee Doctor (Foundation and specialty, including GP training)' (February 2011)

³ NHS Modernising Medical Careers - 'A Reference Guide for Postgraduate Specialty Training in the UK' ('The Gold Guide') (June 2010)

⁴ Welsh Government - 'Doing Well, Doing Better - Standards for Health Services in Wales' (April 2010)

⁵ General Medical Council - 'Good Medical Practice' (March 2013)

⁶ General Medical Council - 'Leadership and management for all doctors' (March 2012)

THE WALES DEANERY ('EDUCATION ORGANISER')

In supporting the delivery of high quality educational supervision, the Wales Deanery has a responsibility to:

- Liaise with Local Education Providers in accordance with agreed arrangements for the recognition of Educational Supervisors and work with LEPs to collect and share information on Educational Supervisors
- Work with Local Education Providers to develop and describe the criteria for eligibility and selection to undertake the role of Educational Supervisor
- Promote awareness and recognition of the role of the Educational Supervisor
- Consider mechanisms for delivery of induction to the role of Educational Supervisor (for newly-selected Educational Supervisors)
- Support the maintenance of a database of Educational Supervisors with appropriate shared access for Local Education Providers
- Monitor and quality assure the provision of time (typically equivalent to a minimum of 0.25 SPA (Supporting Professional Activities) per week per trainee supervised) in job plans for delivery of the Educational Supervisor role
- Support and signpost training relevant to the role of Educational Supervisor (in the context of the Academy of Medical Educators' (AoME) Framework areas⁷) and establish a system to quality assure and recognise Educational Supervisor training, and monitor the uptake of training related to the role by Educational Supervisors
- Promote annual appraisal of the Educational Supervisor role through NHS appraisal and monitor its provision
- Implement quality management processes relating to educational supervision and publish relevant quality control information from external sources including results of the GMC National Trainer Surveys
- Ensure the provision of systems which enable Educational Supervisors and Local Education Providers to provide feedback to the Wales Deanery, as required
- Provide support structures and processes for Educational Supervisors and Local Education Providers, and ensure parties know how to access this support
- Provide and support mechanisms for liaison amongst Educational Supervisors and Local Education Providers to ensure a consistent approach to educational supervision and the sharing of good practice across specialties, professions and Local Education Providers
- Liaise with Local Education Providers regarding concerns relating to individual Educational Supervisors, and the implementation of remediation, where appropriate
- Establish a system for making decisions that individuals should no longer undertake the role of Educational Supervisor and withdrawal of recognition, and a procedure for appeals against such decisions, building on existing arrangements
- Recognise and reward innovation and excellence in the delivery of educational supervision
- Commit to the management of postgraduate medical education and training (and its development) by meeting the provisions of the Service Level Agreement with Local Education Providers and associated commissioning activity
- Report regularly to the GMC on the implementation of recognition of Educational Supervisors and co-operate with quality assurance of this activity by the GMC

In signing this Agreement, the Wales Deanery commits to ensuring that it is continuously monitored and revised, being responsive to the changing landscape of medical education in the UK, including emerging themes, standards and policy. This will include ensuring that any new versions of relevant documents are scrutinised, with any changes considered and, if significant, reflected in revisions to the Agreement on an annual basis.

The Wales Deanery will undertake to inform Local Education Providers and Educational Supervisors of any material change that will affect their practice following issue of the Agreement.

⁷ Academy of Medical Educators – 'A Framework for the Professional Development of Postgraduate Medical Supervisors' (November 2010)

THE LOCAL EDUCATION PROVIDER (NHS LOCAL HEALTH BOARD OR TRUST)

In supporting the delivery of high quality educational supervision, the Local Education Provider has a responsibility to:

- Liaise with the Wales Deanery in accordance with agreed arrangements for the recognition of Educational Supervisors and work with the Deanery to collect and share information on Educational Supervisors
- Identify trainers currently in the role of Educational Supervisor and choose trainers to perform the role
- Ensure sufficient Educational Supervisors are available to train
- Recognise the education and training role and responsibilities of the Educational Supervisor
- Consider mechanisms for the delivery of induction for Educational Supervisors
- Participate in processes for populating and updating the database of Educational Supervisors held by the Wales Deanery
- Ensure that the educational responsibilities of Educational Supervisors are recognised by providing explicit and sufficient time for the role through job planning (typically equivalent to a minimum of 0.25 SPA per week per trainee supervised)
- Demonstrate flexibility in the allocation of time for provision of the educational supervision function in accordance with team/ departmental requirements and needs of the individual Educational Supervisor
- Provide support for the training and professional development of Educational Supervisors, mapping arrangements against the 7 areas of the AoME Framework, and ensuring that the GMC's standards are met
- Provide annual appraisal for the educational supervision component of Educational Supervisors' job plans as part of NHS appraisal with consideration of the relationship between service provision and education and training
- Undertake active involvement in quality management processes relating to educational supervision including providing feedback to the Wales Deanery
- Encourage Educational Supervisor engagement with quality control processes, as required, including completion of the GMC National Trainer Survey
- Support Educational Supervisor attendance at meetings relating to the role or education and training provision
- Encourage involvement of Educational Supervisors in supporting activities relating to the delivery of postgraduate medical training including recruitment to training grade posts and ARCP panels
- Provide local faculty support structures and processes for Educational Supervisors and ensure they know how to access this support, if required
- Provide mechanisms for Educational Supervisors to liaise with others to ensure a consistent approach to educational supervision and the sharing of good practice across specialties and professions
- Take appropriate action where there are concerns regarding individual Educational Supervisors and implement remediation where appropriate
- Liaise with the Wales Deanery over decisions that individuals should no longer undertake the role of Educational Supervisor and withdrawal of recognition
- Commit to the delivery of postgraduate medical education and training (and its development) by meeting the requirements of the Service Level Agreement with the Wales Deanery and associated commissioning activity
- Be accountable to the Wales Deanery for the use of resources received to support medical education and training

Educational Supervisors are responsible for overseeing training to ensure that trainees are making the necessary clinical and educational progress. The Educational Supervisor must satisfy the Wales Deanery that they have the required competence to oversee an individual's postgraduate medical training and ensure a high quality educational experience is provided for trainees. The Educational Supervisor is accountable to their employing Local Education Provider to ensure that the educational role is fulfilled and properly recognised.

THE EDUCATIONAL SUPERVISOR

In supporting the delivery of high quality educational supervision, the Educational Supervisor has a responsibility to:

- Fulfil the Educational Supervisor role as defined in *Appendix 1*.
- Participate in available **induction** for the Educational Supervisor role (if newly-selected)
- Use the **time** allocated to the delivery of the Educational Supervisor role in job planning (typically equivalent to a minimum of 0.25 SPA per week per trainee supervised) to deliver the role and responsibilities defined in this Agreement appropriately and effectively
- Commit to undertake **training** relevant to the role of Educational Supervisor to develop skills and competence - equivalent to a minimum of 8 hours each year (from the effective date of this Agreement), of which at least 4 hours must be Continuing Professional Development (CPD) accredited, and provide evidence of training attended or completed, when requested. Activity must meet GMC standards in relation to all 7 AoME Framework areas over a 5 year cycle (and at least 2 Framework areas per year).
- Demonstrate **attitudes and behaviours** appropriate to the role of Educational Supervisor, and provide evidence of this, when requested.
- Engage in annual **appraisal** of the educational supervision component of the job plan as part of NHS appraisal
- Engage with **quality control** processes as required and complete the annual GMC National Trainer Survey when requested
- **Liaise** with others, both in clinical departments and within the Local Education Provider, to ensure a consistent approach to educational supervision and the sharing of good practice across specialties and professions
- Participate in **supporting activities** relating to the delivery of postgraduate medical training. This could include recruitment to training grade posts, participation in ARCP panels and undertaking educational activities and learning opportunities such as Structured Learning Events (SLEs) with trainees.
- Utilise **support** structures and processes available to assist in the delivery and development of the educational supervision role, as required ⁸

⁸ Signing the Agreement allows you access to Cardiff University library services which includes access to an extensive collection of web based Cardiff University e-resources including eJournals, eBooks and major databases.

The Role of the Educational Supervisor

Definition of 'Educational Supervisor' and 'Named Clinical Supervisor'

The GMC requires recognition of medical trainers in postgraduate training undertaking the role of Educational Supervisor and Named Clinical Supervisor.

An Educational Supervisor is defined as –

a trainer who is selected and appropriately trained to be responsible for the overall supervision and management of a trainee's trajectory of learning and educational progress during a placement or series of placements. Every trainee must have a named educational supervisor. The educational supervisor helps the trainee to plan their training and achieve agreed learning outcomes. He or she is responsible for the educational agreement and for bringing together all relevant evidence to form a summative judgement at the end of the placement or series of placements.⁹

A Named Clinical Supervisor is defined as –

a trainer who is responsible for overseeing a specified trainee's clinical work throughout a placement in a clinical or medical environment and is appropriately trained to do so. He or she will provide constructive feedback during that placement. He or she will lead on providing a review of the trainee's clinical or medical practice throughout the placement that will contribute to the educational supervisor's report on whether the trainee should progress to the next stage of training.⁹

Eligibility for the role of Educational Supervisor

All Educational Supervisors should be doctors who have a clear expressed interest in the training, assessment and development of postgraduate medical trainees.

Eligibility to undertake the role of Educational Supervisor in Wales is as follows –

Substantive consultant - for Foundation, Core and Higher trainees

Locum consultant - not eligible

Staff, associate specialist or specialty (SAS) doctor with Certificate of Completion of Training (CCT) - for Foundation, Core and Higher trainees

Staff, associate specialist or specialty doctor without CCT – for Foundation and Core trainees

In instances of exceptional circumstances, eligibility will be considered on a case by case basis by the Wales Deanery.

Doctors subject to investigation under the GMC's Fitness to Practise (FTP) procedures may undertake the role of Educational Supervisor unless they are suspended or restricted from practising while investigations are continuing. Local Education Providers have a responsibility to inform the Wales Deanery accordingly.

Role of the Educational Supervisor

All trainees must have a named Educational Supervisor and the trainee should be informed in writing of this. A trainee may have the same Educational Supervisor for the duration of their training programme, for stages of their training or for an individual clinical placement – the exact model will be determined by a Local Education Provider. An Educational Supervisor may be based in a different department, and occasionally in a different organisation to the trainee or trainees for which they are responsible.

Typically no more than four trainees may be supervised concurrently by an Educational Supervisor, subject to the provision of appropriate time in a job plan for the provision of educational supervision functions as defined in this Agreement. Any variation to this should be discussed with the Wales Deanery prior to signing the Agreement.

The time identified in a job plan for delivery of the Educational Supervisor role will typically be equivalent to a minimum of 0.25 SPA per week per trainee supervised.

An Educational Supervisor may act additionally as a Named Clinical Supervisor for a trainee or trainees but whilst both roles require recognition by the GMC (and there may be some degree of overlap in these roles), the role and responsibilities of the Named Clinical Supervisor are outwith the specific scope of this Agreement. An Educational Supervisor may also have a role in delivering undergraduate education in which case he or she would need additionally to be recognised by the undergraduate Education Organiser (the medical school).

⁹ General Medical Council – 'Recognising and approving trainers: the implementation plan' (August 2012)

General Responsibilities of the Educational Supervisor

- Maintain an up-to-date knowledge of the relevant curricula, learning portfolio, local policy relating to educational supervision, educational theory and practical educational techniques
- Treat patients, colleagues and trainees with dignity, courtesy and respect at all times and promote a culture which is free from discrimination and harassment, taking into account the principles of equality and diversity
- Enable a trainee to learn by taking responsibility for patient management within the context of clinical governance and patient safety
- Ensure that clinical care is valued for its learning opportunities, and that learning and teaching is integrated into service provision whilst ensuring the maintenance of an environment conducive to effective learning
- Be alert for the trainee whose conduct, health, progress or performance gives cause for concern and, where issues are identified, manage and support the trainee in accordance with local policy and the guidance of the Wales Deanery

The time required to support a trainee with performance related issues may be greater than that required for other trainees so the need for flexibility regarding time spent delivering the educational supervision function in these circumstances must be recognised by the Educational Supervisor and Local Education Provider.

Responsibilities of the Educational Supervisor to the Trainee

- Ensure the trainee receives appropriate training and experience in order to gain the required competencies by:
 - Supporting the trainee in developing their learning portfolio and evidence of competency
 - Ensuring trainee understanding of, and engagement with, the assessment process
 - Ensuring trainee completion of workplace-based assessments and escalating any logistical difficulties with completion to the relevant Training Programme Director
 - Reviewing progress against the curriculum and deciding whether placements have been completed successfully
 - Agreeing the best use of trainee Study Leave to achieve required experience and competencies
 - Ensuring that the trainee receives appropriate career guidance and planning
 - Ensuring the trainee's wider professional development
- Meet with the trainee in private at agreed, protected times in a placement in accordance with curricula requirements to ensure he or she makes the expected clinical and educational progress:
 - Within the first two weeks - to conduct an induction interview, develop a mutually agreed Learning Agreement and educational objectives and establish a supportive relationship
 - (For placements of 6 months or longer) at the mid-point - to carry out appraisal based on the Learning Agreement
 - At the end - to carry out an appraisal to inform the trainee's Annual Review of Competence Progression (ARCP)
 - (Hold additional meetings with the trainee as requested or required, particularly if concerns regarding the trainee's performance or progression become apparent)
 - Give regular, honest and constructive feedback according to the stage and level of training, experience and competence of the trainee
 - Be approachable and available to a trainee to give advice and guidance on clinical, administrative, organisational and governance issues and to provide opportunity for the trainee to raise issues relating to training and support, and manage in accordance with the relevant Local Education Provider or Wales Deanery policy or guidelines
 - Keep appropriate records of assessments
 - Document all meetings and associated outcomes/actions agreed in the portfolio (ensuring that detailed content of discussions remains confidential), and review development of the portfolio by the trainee
 - Liaise with others (including the relevant Named Clinical Supervisor(s), Training Programme Director and Postgraduate Centre) to share information over trainee progression
- Meet with a (Foundation) trainee undertaking a 'taster' placement before the placement (to ensure that the proposed taster is relevant and appropriate to the trainee's career intentions, and to consider objectives) and after the placement (to review attainment)
- Complete the Structured Report which provides evidence of progress in training or sign off the Foundation Achievement of Competency Document (FACD) within the required timescales

Additional Responsibilities of the Educational Supervisor

- Attend meetings relevant to the educational supervision role and disseminate information to a trainee's Clinical Supervisor(s) and the trainee as appropriate
- Arrange for an appropriate colleague to fulfil the educational supervision role during any period of absence. Inform the relevant Training Programme Director if a period of absence will extend beyond 4 weeks.
- Where a trainee's change of placement is accompanied by a change to their educational supervision, undertake formal handover with the new Educational Supervisor to ensure awareness of the content of the Learning Agreement and progress against it (Handover can be replaced by ARCP in the case of Specialty trainees.)

This description of Educational Supervisor responsibilities is not intended to be exhaustive but represents an amalgamation of best practice and descriptors from sources including 'The Gold Guide', NACT (National Association of Clinical Tutors) UK and AoME guidance. It should be read in conjunction with any other local or national guidance on the role of the Educational Supervisor.


Terms of Understanding

The signing of this Agreement commits the signatories to undertake, to the best of their ability, the responsibilities stated in the Agreement. Together, the parties enter into the ethos of this Agreement to mutually promote excellence in postgraduate medical education and training through the development, provision and support of high quality educational supervision.

This Agreement may be renewed upon mutual agreement. Any party wishing to withdraw from the Agreement must notify the other two parties, in writing, of their intention.

A glossary of terms and acronyms included in this Agreement is available from the Wales Deanery on request.

I have read and understand the content of this Agreement, in particular the responsibilities of the Wales Deanery, and hereby agree to adhere to them.

Signature:  Name: PROFESSOR DEREK GALLEN
(Signed on behalf of the Wales Deanery) (IN BLOCK CAPITALS)

Position: Postgraduate Dean Date: 1st October 2013

I have read and understand the content of this Agreement, in particular the responsibilities of the Local Education Provider, and hereby agree to adhere to them.

Signature: Name:
(Signed on behalf of the Local Education Provider) (IN BLOCK CAPITALS)

Position: Date:

I have read and understand the content of this Agreement, in particular the responsibilities of the Educational Supervisor, and hereby agree to adhere to them.

Signature: Name:
(IN BLOCK CAPITALS)

GMC Number:

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 Date:

Preferred E-Mail Address:

Please sign this Agreement and retain it for your information and future reference.
Please sign and submit the enclosed 'Terms of Understanding' documents to your local Postgraduate Centre and the Wales Deanery.

Your personal information will be held and used in accordance with the Data Protection Act 1998. The Wales Deanery will not disclose such information to any unauthorised person or body but where appropriate will use such information in carrying out its various functions and services. If you wish to check, amend, or request the deletion of this data, please contact walesdeanerysre@cardiff.ac.uk

Appendix 2 - Suggested Reading for Trainers (available for loan via local NHS Libraries)

- Bhogal, P et al. 2011. *Effective medical teaching skills: a practical guide to medical education*. BPP Learning Media: London.
9781445379555
- Bleakley, A et al. 2011. *Medical education for the future*. Springer: Dordrecht.
9789048196913
- Davis, M et al. 2011. *How to assess Doctors and Health Professionals*. Chichester: John Wiley & Sons
9781444330564
- Davis, M. and Forrest, K. 2008. *How to teach continuing medical education*. Chichester: John Wiley & Sons
9781405153980
- Dent, J.A. and Harden, R.M. 2013. *A practical guide for medical teachers*. 4th ed. London: Churchill Livingstone/Elsevier.
9780702045516
- Dobson, S et al. 2011. *How to teach: a handbook for clinicians*. Oxford: Oxford University Press
9780199592067
- Dornan, T et al. 2010. *Medical education: theory & practice*. Elsevier: London
9780702035227
- Gopee, N. 2010. *Practice teaching in Healthcare*. London: Sage
9781848601352
- Harden, R.E. and Laidlow, J.M. 2012. *Essential skills for a medical teacher: an introduction to teaching and learning in medicine*. Elsevier: London.
9780702045820
- Hindmarsh, D. and Picot, E. 2012. *Professional development for appraisal and revalidation*. Banbury: Scion
9781904842972
- Mohanna, K et al. 2007. *Your teaching style*. Oxford: Radcliffe.
9781857758580
- Mohanna, K et al. 2011. *Teaching made easy: A manual for health professionals*. 3rd ed. Abington: Radcliffe.
9781846194894
- Seabrook, M. 2014. *How to teach in clinical settings*. New York: John Wiley & Sons.
9781118620939
- Smaldino, S et al. 2013. *Instructional technology and media for learning*. Pearson: Harlow.
9781292021997
- Swanwick, T. 2013. *Understanding medical education*. 2nd ed. New York: John Wiley & Sons.
9781118472408
- Walsh, K. 2013. *Oxford textbook of medical education*. OUP: Oxford.
9780199652679
- Westwood, O et al. 2013. *How to assess students and trainees in medicine and health*. Chichester: John Wiley & Sons.
9780470670897

Further Reading

- The New Doctor GMC 1997
- Doctors in the Making: Dowling & Barrett, The experience of the Pre-Registration Year SAUS Publications, University of Bristol 1991
- Improving the Experience: SCOPME; Good practice in Senior House Officer Training 1991
- Doctors and their Careers: Isobel Allen. A New Generation PSI Publishing 1994
- A Handbook for Medical Teachers. Newble & Cannon, Kluwer Publishers 1994
- Appraising Doctors and Dentists in Training SCOPME 1996
- Teaching Hospital Doctors and Dentists to Teach: SCOPME 1994
- Making the Most of Formal Educational SCOPME 1994; Opportunities for Doctors and Dentists in Training
- Good Assessment Guide Joint Centre for Education in Medicine 1997
- Portfolio-based Learning in General Practice. Working Group on Higher Professional Education, Royal College of General; Practitioners.London 1994
- The Reflective Practitioner Schon D. Basic Books 1983
- Medical Education in the Millenium Jolly B, Rees L. Oxford University Press 1998
- How to Study Medicine Coles C. BMA 1995
- Medical Education Blackwell Science: The International Journal of Undergraduate Postgraduate and Continuing Medical Education
- Medical Teacher: An International Journal of Education in the Health Sciences

Best Evidence Medical and Health Professional Education (BEME)

The Best Evidence Medical Education (BEME) Collaboration (Harden et al., 1999) is an international group of individuals, universities and professional organisations committed to the development of evidence informed education in the medical and health professions. Its aim is to provide and make available the latest findings from scientifically-grounded educational research to enable teachers and administrators to make informed decisions about the kinds of evidence-based education initiatives that boost learner performance on cognitive and clinical measures. Visit <http://www.bemecollaboration.org/> for more information.

Appendix 3 – Glossary of Terms and Acronyms

Academy of Medical Educators (AoME)

The Academy of Medical Educators (AoME) is a multi-professional organisation for anyone involved in medical education. It provides leadership, promotes standards and supports individuals involved in the academic discipline and practice of medical education. The AoME's Professional Standards serve as a guide to curriculum development and provide a recognised framework for individuals to demonstrate expertise and achievements in medical education through accreditation as a medical teacher to an agreed national standard.

Annual Review of Competence Progression (ARCP)

The Annual Review of Competence Progression (ARCP) is a Deanery process which is informed by an Educational Supervisor's Structured Report. The ARCP assesses a trainee's ability to either complete training or to progress to the next level of their training programme. It is underpinned by appraisal, assessment and annual planning which precede it. An ARCP panel considers the evidence presented to it to make a judgement as to whether a trainee has attained all required competencies and has made appropriate progress. In instances of an unsatisfactory outcome, the panel may make recommendations for additional or focused training required. All Foundation, Core and Specialty trainees must undergo ARCP on an annual basis.

Appraisal

Appraisal is interlinked with assessment. It provides an opportunity to review personal, educational and job related achievements and areas for improvement. It is a confidential process which is designed to support individuals in their role. Trainees should undergo regular appraisal throughout their training (see '*Educational Appraisal*'). Trainers must receive appraisal of their trainer role as part of their NHS appraisal.

Assessment

Assessment is interlinked with appraisal. It provides information on current skills and skills gaps by considering career goals and measuring achievement, skills and knowledge against curriculum requirements. All trainees should be assessed on a regular basis throughout their training programme.

Certificate of Completion of Training (CCT)

A Certificate of Completion of Training (CCT) is issued by the GMC to trainees once they have successfully completed their specialty training. A CCT confirms that a doctor has completed an approved training programme in the UK and is eligible for entry onto the GP or Specialist Register. It is a legal requirement for doctors practicing as substantive, fixed term or honorary consultants in the NHS to be on one of these registers.

Clinical Supervisor's Report

The Clinical Supervisor's Report is a short, structured report which must be completed by a Named Clinical Supervisor for each of their trainees. The report contains comments on a trainee's skills and clinical progress as well as feedback to help the trainee develop their next Personal Development Plan.

College Tutor

The College Tutor is the local representative of the Royal College within a Local Education Provider who has a duty to keep up to date with College training standards and the specialty training programme curriculum. Their main responsibility is to foster and develop the availability of quality training experiences with the support of other colleagues involved in medical education and training.

Commissioning Process	<p>The Commissioning process is one of the quality management processes employed by the Wales Deanery as part of its Quality Management Framework. The main remit of the Commissioning Process is to undertake an annual review of activity in each Local Education Provider (NHS Health Boards/Trusts) across Wales. The review considers compliance with the required national standards for medical education and training over the previous year and a check that organisations have been able to, and can continue to, deliver against the Deanery's Service Level Agreement with Local Education Providers (LEPs). In addition, it is an opportunity to acknowledge best practice.</p>
Continuing Professional Development (CPD)	<p>Continuing Professional Development (CPD) refers to education and development activities undertaken to improve knowledge and skills in a specific professional area. Trainers are required to undertake CPD in relation to their educational role.</p>
Core Training	<p>Core training forms the first stage of uncoupled training which lasts for 2 years in most specialties. Trainees in core training will be Specialty Registrars (StRs). Successful completion of core training contributes to the award of a Certificate of Completion of Training (CCT) and provides eligibility to apply for higher specialty training programmes in defined, related specialties and posts in the formal career grade structure.</p>
Educational Agreement	<p>An Educational Agreement is an educational development plan which is drawn up and agreed by the trainee and their Educational Supervisor. It sets out for the trainee:</p> <ul style="list-style-type: none"> - The specific aims and learning outcomes for the next stage of training based on the curriculum and ARCP outcome - The clinical duties and arrangements for supervision - Details of training, and educational and competency goals - The Personal Development Plan and objectives - A schedule for appraisal and assessment <p>The Agreement will form the basis of all appraisal discussions and be subject to regular review and updating.</p>
Educational Appraisal	<p>An Educational Appraisal is a formal meeting between a trainee and their Educational Supervisor at which the following are considered:</p> <ul style="list-style-type: none"> - Progress in fulfilling the Educational Agreement - Development of the Learning Portfolio (e-portfolio) - Maintenance of an up-to-date log book (in some specialties) - Completion of workplace-based assessments - Performance in knowledge tests (usually Royal College examinations) at the appropriate stage(s) of the curriculum
Educational Supervision Agreement (ESA)	<p>The Educational Supervision Agreement (ESA) is a document that sets out the mechanisms for, and support of, the development and provision of high quality educational supervision in postgraduate medical education and training by defining the role, responsibilities and rights of three parties—the individual Educational Supervisor, a Local Education Provider and the Wales Deanery. It has been approved by BMA Cymru Wales and is recognised by NHS Wales. All Educational Supervisors in Wales must be signed up to it.</p>

Educational Supervisor (ES)	An Educational Supervisor (ES) is a trainer who is selected and appropriately trained to be responsible for the overall supervision and management of a trainee's trajectory of learning and educational progress during a placement or series of placements. Every trainee must have a named educational supervisor. The educational supervisor helps the trainee to plan their training and achieve agreed learning outcomes. He or she is responsible for the educational agreement and for bringing together all relevant evidence to form a summative judgement at the end of the placement or series of placements.
Educational Supervisor's Structured Report	<p>An Educational Supervisor's Structured Report must be completed for each trainee supervised at the end of their training year. It summarises a trainee's progress through a placement and is likely to include:</p> <ul style="list-style-type: none"> - The Learning Agreement and objectives agreed at the start of a placement - Evidence from workplace-based assessments - Any modifications to the Educational Agreement - Details of any remediation undertaken during the placement - A synthesis of evidence from the Learning Portfolio including the trainee's assessments, experience and educational activities
E-Portfolio	See ' <i>Learning Portfolio</i> '.
Faculty Lead	Faculty Leads work as part of the Faculty Team within their Local Education Provider in partnership with the Wales Deanery to support, deliver and manage postgraduate medical education and training in Wales. Faculty Leads typically have specific areas of responsibility in relation to quality, trainee and trainer support.
Faculty Team	Each Local Education Provider has a Faculty Team (which typically includes Faculty Leads, Assistant Medical Directors for Education and Training, Foundation Programme Directors, Medical Education Managers, AWHILES Librarians, GP Programme Directors, SAS Tutors and undergraduate tutors). The Faculty Teams are central to the support, delivery and management of postgraduate medical education and training in their locale. Faculty Teams also work with specialty structures to promote high quality training in order to support patient safety.
Foundation Achievement of Competency Document (FACD)	The Foundation Achievement of Competency Document (FACD) is awarded to Foundation doctors who have successfully completed the two year Foundation Programme. This document allows trainees to apply for Core/Specialty training.
Foundation Programme Director (FPD)	There are 15 Foundation Programme Directors (FPDs) located across NHS Wales with responsibility for ensuring that a quality Foundation training programme is being delivered and that each Foundation doctor is adequately supervised throughout their Foundation training. They are also responsible for assessing Foundation doctors at the end of their F1 and F2 years and for providing additional support to those trainees who require it.
Foundation Training	Foundation training comprises a two year generic training programme undertaken by trainees once they have graduated from medical school. It is designed to give Foundation doctors a range of experience in a variety of specialties before choosing an area of medicine in which to specialise, and delivers an integrated educational programme with defined outcomes. Trainees who successfully complete the first year (F1) can apply for full registration with the General Medical Council. Trainees who successfully complete the second year (F2) are issued with a Foundation Achievement of Competency Document (FACD) which allows them to apply for Core/Specialty training.

General Medical Council (GMC)	The General Medical Council (GMC) has statutory responsibility for the quality assurance of postgraduate medical education and training. It does this by setting and monitoring standards in medical education for all stages of training (i.e. undergraduate, Foundation Core and Higher Specialty training, including General Practice).
GMC National Trainer Survey	The GMC National Trainer Survey is an online questionnaire used to gather information and feedback from trainers in relation to their role as a trainer, including the support and recognition they receive for this role.
Gold Guide	The Gold Guide (February 2016) provides guidance to Postgraduate Deans on the arrangements and requirements for specialty training in the UK.
Higher Specialty Training	Higher Specialty Training takes place in the years following Foundation or Core training. Satisfactory completion of Specialty training leads to the award of a Certificate of Completion of Training (CCT).
Induction Interview	<p>A meeting between an Educational Supervisor and the trainee for whose supervision they are responsible at which they will:</p> <ul style="list-style-type: none"> - Review progress in previous placements in a formal appraisal - Complete an Educational Agreement - Ensure the trainee understands his/her responsibility for his/her own learning, the structure of the programme, the curriculum, the educational opportunities available, the assessment system and the relevant Learning Portfolio
Intrepid	Intrepid is the database currently used by the Wales Deanery to store trainer information. All trainers who have signed the Educational Supervision Agreement or declared themselves as Named Clinical Supervisors are recorded as such in Intrepid. Trainers are able to use the Self-Accreditation module in Intrepid as a repository to record the CPD that they have undertaken in relation to their educational role if they wish.
Learning Portfolio	A Learning Portfolio is a record (often electronic – e-portfolio) of a trainee's assessments, achievements and other evidence demonstrating completed outcomes as specified by the General Medical Council (GMC). This can include logbooks, audit reports, research activity and publications. It should form the basis of the educational and workplace-based appraisal process and the annual planning process. It should also be used to store outcome forms from completed ARCPs.
Local Education Provider (LEP)	Local Education Providers (LEPs) are the NHS Wales Health Boards/Trusts that the Deanery commissions to host and support postgraduate medical and dental education and training across Wales in line with local, national and professional standards.
Medical Appraisal Revalidation System (MARS)	The Medical Appraisal Revalidation System (MARS) is the appraisal website for all doctors in Wales. It is separated into two dedicated sites – one for doctors working in General Practice and one for doctors in all other specialties. It is designed to facilitate the appraisal process and to support individual doctors and Responsible Officers through revalidation. Trainers must record the CPD undertaken in relation to their educational role in MARS and be prepared to discuss this at their NHS appraisal.

Named Clinical Supervisor (NCS)	A Named Clinical Supervisor (NCS) is a trainer who is responsible for overseeing a specified trainee's clinical work throughout a placement in a clinical or medical environment and is appropriately trained to do so. He or she will provide constructive feedback during that placement. He or she will lead on providing a review of the trainee's clinical or medical practice throughout the placement that will contribute to the Educational Supervisor's report on whether the trainee should progress to the next stage of training.
National Association of Clinical Tutors (NACT UK)	The National Association of Clinical Tutors (NACT UK) is a member's organisation supporting and representing local leaders who deliver medical and dental education in the UK. Anyone with a role in medical or dental education can join. NACT UK provides professional development and networking opportunities as well as a library of shared resources.
National Leadership and Innovation Agency for Healthcare (NLIAH)	The National Leadership and Innovation Agency for Healthcare (NLIAH) is part of NHS Wales and works with Local Education Providers to deliver better quality and safer patient services.
NHS Wales	NHS Wales is the publicly funded National Health Service of Wales providing healthcare to the population of Wales. It is the responsibility of the Welsh Government.
NHS Wales Informatics Service (NWIS)	The NHS Wales Informatics Service (NWIS) was established on 1 st April 2010 and works in partnership with NHS Wales organisations. It is responsible for delivering the national information and technology services needed for modern patient care.
Postgraduate Centre	Postgraduate Centres are located in district general hospitals and psychiatric hospitals in Wales and provide the focus and location for vocational training both in medicine and dentistry as well as General Practice CPD activities. In addition to medical and dental educational activity, Centres are also increasingly being used to support multi-professional and inter-professional education.
Quality Assurance	Quality assurance is the principal activity which both quality management and quality control feed into. Quality assurance is process orientated and comprises all of the policies, standards, systems and processes which have been implemented to ensure confidence that outcomes will meet quality criteria. Within the context of postgraduate medical and dental education and training in the UK quality assurance activity is the responsibility of the relevant regulatory organisation.
Quality Control	Quality control activity is outcome focused and is therefore primarily concerned with the evaluation of whether or not the product meets a set of predefined criteria. Within the context of postgraduate medical education and training quality control is the responsibility of the Local Education Provider and Training Programme Leads to consider quality against national standards.
Quality Management	The term quality management refers to the arrangements that an organisation utilises to ensure that postgraduate medical education and training are meeting national standards. The arrangements are usually conveyed in a quality management framework which provides an overview of all of the structures which have been implemented to enable an organisation to discharge its quality management responsibilities. Quality management is the responsibility of the Wales Deanery.
Royal College Tutor	See ' <i>College Tutor</i> '.

Self-Accreditation Module

The Self-Accreditation module is a module within Intrepid (the Deanery's trainer database) that trainers can use as a repository to record the CPD that they have undertaken in relation to their educational role if they wish.

Service Level Agreement (SLA)

The Wales Deanery commissions Local Education Providers in Wales to provide postgraduate medical and dental training in line with local, national and professional standards. The Service Level Agreement (SLA) sets out this arrangement formally and confirms the Local Education Provider's accountability to the Deanery.

Training Programme Director (TPD)

Training Programme Directors (TPDs) are responsible for managing specialty training programmes and providing advice and support to colleagues across NHS Wales in relation to the specialty training programme.

Welsh Government

Welsh Government is the devolved government for Wales with a remit that includes responsibility for health, education and the environment. Welsh Government provides the Wales Deanery with funding to train junior doctors and dentists. It also forecasts the number of trained medical and dental professionals required in future years.

Workplace Based Assessment (WPBA)

Workplace-Based Assessments (WPBAs) are assessments of a trainee's competence based on what they actually do in the workplace. The main aim of WPBAs is to aid learning by providing constructive feedback. They also assist trainers in monitoring a trainee's progress and can be used to inform ARCPs.