

**The Nursing and Midwifery Standards To
Support Learning and Assessment in Practice
The Triennial Review Process**

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1. Background and Introduction

1.1. From September 2007 the roles and responsibilities of mentors changed following the implementation of the revised mentor standards (NMC 2006). This new standard requires placement provider organisation such as ULHT to hold a local register of mentors which includes information about a mentors initial qualifications, mentor qualifications, and dates of mentor updates. Within Lincolnshire the local register is held by the Lincolnshire Intraprofessional Practice Learning Unit (IPLU) for nursing and the Senior Midwife for Education/Quality for midwifery. In order to stay on the register mentors/practice teachers will have to demonstrate that they have maintained the requirements of mentoring and practice teaching. In addition to this once every three years, the employee is expected to have a formal review of their performance as a mentors, this formal review process is referred to as the triennial review. The process for activation, deactivation and removal of the name of mentor/practice teacher for nursing and midwifery is contained in appendix 3.

2. Aims of this Guidance

2.1. The aim of this document is to provide information and guidance for mentors, practice teachers and managers regarding the maintenance of the Nursing and Midwifery Council standards to support learning and assessment in practice (NMC, 2008) within United Lincolnshire Hospitals Trust and what should be included within the triennial review process

3. Scope of the Guidance

3.1. This guidance applies to all mentors, sign off mentors and practice teachers in both nursing and midwifery employed within United Lincolnshire Hospitals NHS Trust

4. The NMC Standards to Support Learning and Assessment in Practice

4.1. The NMC (2008) has stated that all staff recorded on their local placement mentor register as a mentor/sign-off mentor for pre-registration nursing/ midwifery students practice teacher for post-registration nursing/midwifery students, 'must demonstrate their knowledge, skills and competence on an ongoing basis' (NMC, 2008).

4.2. The NMC state that to be maintained on the local register the individual must have evidence of having:

- Mentored at least two students (practice teachers to supervise at least one student) with due regard (extenuating circumstances permitting) within the three year period.
- Participated in annual updating – to include an opportunity to explore assessment and supervision issues with other mentors/practice teachers.
- Explored as a group activity the validity and reliability of judgements made when assessing practice in challenging circumstances.
- Mapped ongoing development in their role against the current mentor/practice teacher standards.' (NMC, 2008)

5. The Annual Update

5.1. Within United Lincolnshire Hospitals Trust from April 2009 a mentor update will be included within the mandatory training programme within the organisation. Therefore, when an individual attends the Trust's mandatory programme, their annual update will be automatically included.

5.2. In addition to this the mentor update can be undertaken attendance at and subsequent reflection on:

- Mentor/practice teacher development days or similar organised activities
- Information sessions provided by provider universities which include curriculum and programme documentation and assessment
- Conferences and seminars which focus on learning and development

6. How evidence is Recorded

6.1. The NMC do not state the minimum amount of time that should be spent on an annual update. Dates of attendance should be recorded and held with the mentor/practice teacher register. Details of the nature of the update and supporting evidence may be kept within staff member's Personal Professional Profile (PPP) which is part of the Post-registration Education and Practice (PREP) requirement (NMC, 2006). The NHS Knowledge and Skills Framework (NHS KSF) appraisal system also presents another means of recording details of the annual update.

7. Arrangements for the Triennial Review

7.1. The individual's yearly appraisal meeting with their managers is the ideal time to discuss the individual's annual update, and when they are due, the triennial review to be conducted. Mentors should take their evidence of annual update to the appraisal meeting in order for the manager to ensure that the mentor is meeting their standard requirements. If the update requirement has not been met then the mentor and manager should agree arrangements for the update to be undertaken.

8. Completion of the Triennial Review Form

8.1. At the triennial review meeting, the mentor/practice teacher and manager must complete the triennial review form (Appendix 1). The manager should verify that a minimum of two students have been mentored by the staff member in the preceding three years (or a minimum of one student for a practice teacher). For practice teachers, 'this would be a student intending to enter the SCPHN part of the register, or record a SPQ on the nurses' part of the register, or an ANP student' (NMC, 2006, p8). The manager must verify that all competencies have been achieved by recording the nature of evidence that relates to each competency.

Triennial Review Form for Mentors/Practice Teachers

This form is to be completed by the mentor/practice teacher and manager, and should be completed every three years.

| | | |
|--------------------------|--|--|
| Name: | Work Address: | Designation: Mentor/ Sign Off Mentor/Practice Teacher |
| Date of Triennial Review | Date of Annual Updates Year 1 Year 2 Year 2 | Number of students supervised in preceding 3 years |

| OUTCOME DOMAINS | Summary of Evidence of achievement | Tick and date |
|--|---|----------------------|
| Establishing effective working relationships | | |
| 1.1 Developing effective working relationships based on mutual trust and respect | | |
| 1.2 Demonstrate an understanding of factors that influence how students integrate into practice setting | | |
| 1.3 Provide ongoing and constructive support to facilitate transition from one learning environment to another | | |
| Facilitation of Learning | | |
| 2.1 Use knowledge of the student's stage of learning to select appropriate learning opportunities to meet their individual needs | | |
| 2.2 Facilitate selection of appropriate learning strategies to integrate learning from practice and academic experiences | | |
| 2.3 Support students in critically reflecting upon their learning experiences in order to enhance future | | |

| OUTCOME DOMAINS | Summary of Evidence of achievement | Tick and date |
|---|------------------------------------|---------------|
| learning | | |
| Assessment and Accountability 3.1 Foster professional growth, personal development and accountability through support of students in practice | | |
| 3.2 Demonstrate a breadth of understanding of assessment strategies and the ability to contribute to the total assessment process as part of the teaching team | | |
| 3.3 Provide constructive feedback to students and assist them in identifying future learning needs and actions. Manage failing students so that they may either enhance their performance and capabilities for safe and effective practice or be able to understand their failure and the implications of this for their future | | |
| 3.4 Be accountable for confirming that students have met, or not met, the NMC competencies in practice. As sign-off mentor confirm that students have met, or not met, the NMC standards of proficiency in practice and are capable of safe and effective practice | | |
| Evaluation of Learning 4.1 Contribute to evaluation of student learning and assessment experiences – proposing aspects for changes as a result of such evaluations | | |
| 4.2 Participate in self and peer evaluation to facilitate personal development, and contribute to the development of others | | |
| Creating an Environment for Learning 5.1 Support students to identify both learning needs and | | |

| OUTCOME DOMAINS | Summary of Evidence of achievement | Tick and date |
|---|---|----------------------|
| experiences that are appropriate to their level of learning | | |
| 5.2 Use a range of learning experiences, involving patients, clients, carers and the professional team, to meet defined learning needs | | |
| 5.3 Identify aspects of the learning environment which would be enhanced – negotiating with others to take appropriate changes | | |
| 5.4 Act as a resource to facilitate personal and professional development of others | | |
| Context of Practice | | |
| 6.1 Contribute to the development of an environment in which effective practice is fostered, implemented, evaluated and disseminated | | |
| 6.2 Set and maintain professional boundaries that are sufficiently flexible for providing inter-professional care | | |
| 6.3 Initiate and respond to practice developments to ensure safe and effective care is achieved and an effective learning environment is maintained | | |
| Evidence-Based Practice | | |
| 7.1 Identify and apply research and evidence based practice to their area of practice | | |

| OUTCOME DOMAINS | Summary of Evidence of achievement | Tick and date |
|---|------------------------------------|---------------|
| 7.2 Contribute to strategies to increase or review the evidence base used to support practice | | |
| 7.3 Support students in applying an evidence base to their own practice | | |
| Leadership 8.1 Plan a series of learning experiences that will meet students defined learning needs | | |
| 8.2 Prioritise work to accommodate support of students within their practice roles | | |
| 8.3 Provide feedback about the effectiveness of learning and assessment in practice | | |

Triennial Review Mentors/Practice Teachers Examples of Evidence

| Competency Domain | Examples of Evidence |
|--|--|
| <p>Demonstrate effective relationship building skills sufficient to support learning, as a part of a wider interprofessional team, for a range of students in both practice and academic learning environments</p> | <p>Witness testimony from a manager or members of the multidisciplinary team that confirm team working and relationship building skills. Support given to new members of the team. Communication with partners involved in learning, for example the practice education team. Anonymised written feedback from learners. Written evaluation of formal tutorials in clinical area and/or academic setting.</p> |
| <p>Facilitate learning for a range of students, within a particular area of practice where appropriate, encouraging self management of learning opportunities and providing support to maximise individual potential</p> | <p>Orientation/induction of learners to the clinical area. Anonymised examples of learning contracts and timetables demonstrating how the mentor/practice teacher encouraged the learner to manage their own learning. This may be with different types of learners and at different stages. Development of learning outcomes. Involvement in implementing timetables/pathways to maximise the number of learners accommodated within the placement area whilst enhancing/not compromising the quality of the learning available. Mentor/practice teacher facilitating a learner to discuss their learning and how they have progressed. This may be from witness testimony (the manager has observed the exchange) or from the mentor/practice teacher’s reflective accounts.</p> |
| <p>Assess learning in order to make judgements related to the NMC standards of proficiency for entry to the register or for recording a qualification at a level above initial registration</p> | <p>Attendance at and reflection on mentor/practice teacher related activities that focus on assessment. Anonymised examples of completed assessment documentation demonstrating the feedback given. Peer evaluation of meetings with learner where feedback/assessment is given. Anonymised examples of completed assessment tools, e.g. formative assessments or competency checklists related to a particular skill. Anonymised examples of action plans developed to address particular learning needs. Reflective account of dealing with a challenging learner or a learner with additional support needs.</p> |

Triennial Review Process

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| <p>Create an environment for learning where practice is valued and developed, that provide appropriate professional and inter professional learning opportunities and support for learning to maximise achievement for individuals</p> | <p>Delivery of teaching – formal or informal, may be lecture, tutorial, group work or individual e.g. a nursing topic or clinical skills. Involvement with orientation/induction programmes. Facilitation of tutorial programmes for learners. Development of teaching resources, e.g. resource files, learning activities. Audit, S.W.O.T. analysis or risk assessment of the learning environment.</p> |
| <p>Support learning within a context of practice that reflects health care and educational policies, managing change to ensure that particular professional needs are met within a learning environment that also supports the practice development</p> | <p>Attendance at and reflection on mentor related activities, e.g. Practice Learning Team Attendance at and reflection on study days that focus on learning and development Learning and Development topics such as Presentation Skills. Written report, reflective account or witness testimony of involvement in the management of change within the placement area. Knowledge and understanding of current healthcare and educational policies demonstrated by discussion with manager or completion of reflective account. Involvement with practice development,</p> |
| <p>Apply evidence based practice to own work and contribute to the further development of such knowledge and practice evidence base</p> | <p>Witness testimony of the practitioner's application of evidence based practice. Membership of clinical groups either local or national, e.g. Tissue Viability or Record Keeping – needs to demonstrate attendance and work undertaken within the group. Participation in research and/or audit. Literature search and review. Attendance and reflection on study days, conferences or seminars, e.g. clinical or professional topics. Journal Club, e.g. attendance and reflection on.</p> |
| <p>Demonstrate leadership skills for education within practice and academic settings</p> | <p>Participation in Clinical/Education meetings or other relevant working groups. Evidence of cascading information related to learning and development within or across departments. Notes of planning and organisation of student placement. Witness testimony of mentor acting as an advocate for learners. Significant Event Analysis or Critical Incident related to learning and development.</p> |
| <p>Determine strategies for evaluating learning in practice and academic settings to ensure that the NMC standards of proficiency for registration or recording a qualification at a level above initial registration have been met</p> | <p>Involvement in developing and using local evaluation tools relating to the placement as a whole or to particular learning resources that have been developed. Evidence of applying quality standards to the placement area Involvement with audit of the learning environment. Development of action plans to address areas where concern is raised with the quality of the learning opportunities - evidence of action plan review.</p> |

Triennial Review Process

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| | Through one to one discussion demonstrates knowledge of the course requirements and assessment strategies. |
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Appendix 3

Triennial Review Return Form

To be completed and sent to the IPLU on completion of the Triennial review. Please send through to: Eleanor Jenvey: Eleanor.Jenvey@ulh.nhs.uk

Practice Learning Administrative Officer, Lincolnshire Interprofessional Practice Learning Unit, Greetwell Place, Limekiln Way, Lincoln LN2 4US

Record of Mentor UpdatesPlease
Tick

| | | |
|--|------------------|--------------------------|
| NAME: | Mentor | <input type="checkbox"/> |
| | Sign-off Mentor | <input type="checkbox"/> |
| | Practice Teacher | <input type="checkbox"/> |
| I completed a mentor update on (date): | | |
| The mentor update was: | On-line: | <input type="checkbox"/> |
| | Face-to-face | <input type="checkbox"/> |
| | Workbook | <input type="checkbox"/> |
| | PLT Activities | <input type="checkbox"/> |
| I completed a mentor update on (date): | | |
| The mentor update was: | On-line: | <input type="checkbox"/> |
| | Face-to-Face | <input type="checkbox"/> |
| | Workbook | <input type="checkbox"/> |
| | PLT Activities | <input type="checkbox"/> |
| I completed a mentor update on (date): | | |
| The mentor update was: | On-line: | <input type="checkbox"/> |
| | Face-to-face | <input type="checkbox"/> |
| | Workbook | <input type="checkbox"/> |
| | PLT Activities | <input type="checkbox"/> |

NB Within the last three years at least one Mentor Update must be Face-to-Face MENTORING STUDENTS

| | |
|--|------------------|
| I can confirm that during the last 3 years I have acted as a Mentor / Practice Teacher to (insert number) students | |
| | Mentor Signature |
| | Print Name |

TRIENNIAL REVIEW MEETINGS

| | | |
|--|--------------------|--------------------------|
| I can confirm that | (Insert name) has: | Please Tick |
| • Attended annual Mentors update | | <input type="checkbox"/> |
| • Mentored a minimum of 2 students in the last 3 years | | <input type="checkbox"/> |
| • or Practice Teachers; one SCPHN student in the last 3 years | | <input type="checkbox"/> |
| • Have evidence of CPD in relation to Mentoring/Practice Teaching | | <input type="checkbox"/> |
| (Signature of Reviewer) | Date: | |
| (Print Name of Reviewer) | Date: | |
| CURRENT WORKPLACE: | | |

Appendix 4**Process for the Admission of Mentors or Practice Teachers
to the Active Mentor Database****Criteria for admitting a mentor or practice teacher**

Admission of a mentor or practice teacher will occur in the following circumstances:

- Completion of an NMC approved mentor or practice teacher qualification
- They move into the Lincolnshire health or social care community and have satisfied their line manager that they meet the NMC Standards to Support Learning and Assessment in Practice. The line manager may seek advice from a local education provider if required
- Readmission of a removed mentor or practice teacher where they have satisfied their line manager that they can now meet the NMC Standards to Support Learning and Assessment in Practice

Mentor preparation is currently available on East Midlands wide Learning Beyond Registration contracts, see relevant Trust website for details

Requesting admission to the database

The following may request admission of a mentor or practice teacher to the database by contacting the IPLU / Senior Midwife

- The mentor or practice teacher
- The line manager or the nominated deputy of the mentor or practice teacher
- The education provider of approved mentor or practice teacher courses

Information required by the IPLU for entry on to the database

- Forename
- Surname
- Place of work
- Job role/ title
- Work e-mail address
- Hours of work
- Part of NMC register
- Mentor or practice teacher qualification and date achieved

- Mentor update date, type and provider (where applicable)

Providing evidence of mentor or practice teacher qualification

The IPLU will seek further evidence of mentor or practice teacher qualification where insufficient information is given.

Sharing information

The information held on the active mentor database may be shared with line managers or their nominated deputy, service education leads and education providers for quality assurance purposes.

IPLU contact details

Eleanor Jenvey: Eleanor.Jenvey@ulh.nhs.uk

Practice Learning Administrative Officer

Lincolnshire Interprofessional Practice Learning Unit

Greetwell Place, Limekiln Way, Lincoln LN2 4US

Senior Midwife Education /Quality contact details

Bridget Clark: Bridget.Clark@ulh.nhs.uk

Senior Midwife Quality / Education

Lincoln County Hospital, Greetwell Road, Lincoln LN2 5QY

Criteria for deactivating a mentor or practice teacher

Deactivation of a mentor or practice teacher will occur where a mentor is temporarily unable to meet mentor or practice teacher standards. This may be due to a job role that is inconsistent with providing mentorship and or where they have not been an active mentor for over 6 months.

Sanctioning deactivation

Only the line manager or their nominated deputy may deactivate a mentor or practice teacher from the active mentor database.

Deactivation

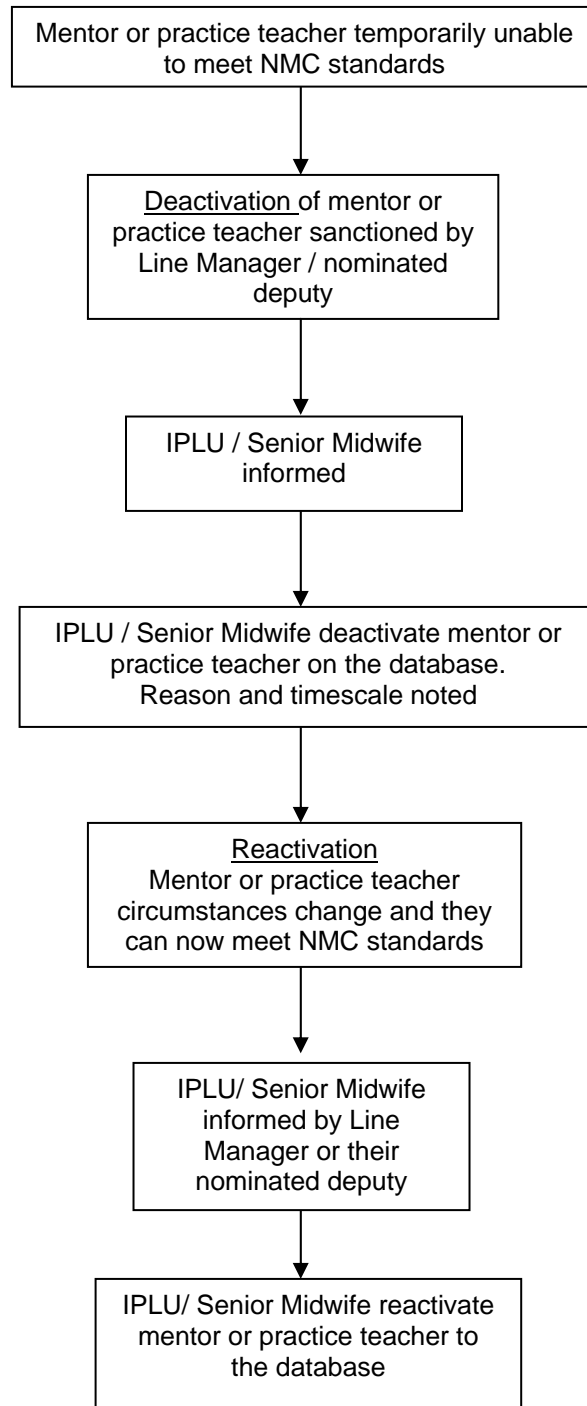
The IPLU / Senior Midwife will designate a mentor or practice teacher as deactive on the mentor database at the request of the line manager or their nominated deputy. The reasons and potential time period will be noted.

Reactivation to the database

When a mentor or practice teacher's circumstances change and they can meet the NMC Standards to Support Learning and Assessment in Practice the line manager or nominated deputy may ask the IPLU / Senior Midwife to reactivate them to the active nurse mentor database. The date of reactivation will be noted.

Process for the Deactivation and Reactivation of Mentors and Practice Teachers from the Active Mentor Database

The IPLU or the Senior Midwife Education/ Quality may be contacted for advice at any point in the process



For Nurse Mentor Database:

Eleanor.Jenvey@ulh.nhs.uk

Lincolnshire IPLU
Managed Workspace
Greetwell Place
Limekiln Way
Lincoln
LN2 4US

For Midwifery Database:

Bridget.Clark@ulh.nhs.uk

Midwifery
Lincoln County Hospital
Greetwell Road
Lincoln
LN2 5QY

Criteria for removing a mentor or practice teacher

Removal of a mentor or practice teacher will occur where they have failed to meet the NMC Standards to Support Learning and Assessment in Practice or they move out of Lincolnshire Health or Social Care Community

Initiating the process

Concerns about a mentor or practice teacher must be identified to the line manager who will initiate the following steps. (Identifiers may include service users/ patients, students, education provider staff or a colleague).

Review of a mentor or practice teacher potentially to be removed from the register

The line manager convenes a meeting to discuss action required involving the mentor or practice teacher and where appropriate the identifier of the issue. Where a concern is substantiated either a remedial action plan or immediate removal from the mentor database will be agreed. The meeting and action must comply with placement provider and education provider policy/ guidance.

Sanctioning removal

Only the line manager may ask the IPLU / Senior Midwife to remove a mentor or practice teacher from the mentor database giving a reason and review date if appropriate.

Removal from the mentor database

The IPLU / Senior Midwife will remove the mentor or practice teacher from the main database. The individual's details, including reason for removal and date, will be retained on the removed mentors database to ensure an audit trail.

Readmission to the database

See process for admission to the mentor database. The details of former removal will be retained on the new entry to the database for quality assurance.

Process for the Removal of Mentors and Practice Teachers from the Mentor Database

The IPLU or Senior Midwife Education/ Quality may be contacted for advice at any stage of the process

