# **Practice learning approval and ongoing monitoring tool exemplar – short version**

**Part of the**

**Multi Professional Quality Assurance of the Practice Learning Environment Toolkit**



## Practice learning approval and ongoing monitoring tool exemplar – please see FAQs for support

We would recommend accessing any previous audit and policies of the learning environment before completing the toolkit. The safe learning environment charter has been mapped as part of the exemplars <https://learninghub.nhs.uk/catalogue/safe-learning-environment-charter>

|  |  |  |  |
| --- | --- | --- | --- |
| Practice learning organisation | Organisation name / surgery | Practice learning name | Residential home / hospice / service division / surgery / specific private practice |
| Address including postcode and Tel No. |  | Type of learners (inc. regulator) |  |
| Name of Learning education lead/ practice education facilitator and email address |  | Areas within approval i.e., service, ward, surgery |  |
| Reason for Approval (new placement, new learners, risks\*) | If risk, please describe in detail including if NMC exception reports have been submitted and ensure toolkit action plans reflect NMC concerns. In this instance, the approval will be completed with the relevant NMC correspondents. All exception reports to be shared with education quality teams at NHS England WT&E. | Name & organisation of educational / university Representative |  |
| \*If risk, please describe in detail if NMC exception reports have been submitted and ensure toolkit action plans reflect NMC concerns. In this instance, the approval will be completed with the relevant NMC correspondents. All exception reports to be shared with the education quality team at NHS England WT&E. | | | |
| Contact name, designation, and email of clinical manager | |  | |
| Contact name, designation, and email of learner co-ordinator | | i.e. education team, link tutor, workforce lead, manager | |
|  | | | |
| Names of individuals completing this tool and designation | |  | |
| Date Completed |  | Action Plan Required  (Following section 1 / 2) | Yes  No |
| Date to review action plan if required |  |

**Checklist for all practice learning providers**

**Section 1:** Mandatory core requirements – Questions 1- 5 of section 1 will need to be GREEN, or an action plan in place, before taking learners.

| Section 1 |  | Comments |
| --- | --- | --- |
| 1. Is there a contractual agreement between placement provider and educational provider, and NHS England Workforce Training & Education (WT&E)? | Choose an item.  **YES: GO to next question**  **NO: STOP use action plan** | * Supporting learners from [add name] university * Partnership Agreement signed date * NHS Education Agreement signed date |
| 1. Are there registered professionals (if required) in this placement to support learners? | Choose an item.  **YES: GO to next question**  **NO: STOP use action plan** | * There are….multi professionals in area * Students will be allocated a named practice assessor / educator / supervisor who is part of the team * Using long arm model of supervision * Area can support students on assessed / non assessed placements |
| 1. Are those supervising/assessing learners, appropriately trained in line with regulatory bodies and other standards of partner organisations (e.g. Education providers, NHS England WT&E)? | Choose an item.  **YES: GO to next question**  **NO: STOP use action plan** | * Staff have completed practice assessor / practice supervisor training / educator training. * This is a non-assessed placement / there are no registrants in team * Student will be supported by appropriate member of staff |
| 1. Are there any complaints or serious untoward incidents currently being investigated that may affect the learner’s learning environment? | Choose an item.  **YES: STOP use action plan**  **NO: GO to next question** |  |
| 1. Do you have any CQC ratings of ‘Requires Improvement’ or ‘Inadequate’? Is a CQC section 39 imposed?   Date of Last CQC/Ofsted inspection, report, and rating. | Choose an item.  **YES: STOP use action plan**  **NO: GO to next question** | * Date of last CQC/Ofsted inspection [ADD]: * Rating: [ADD]   Note*: Domiciliary care will tend to have an email sent to them every other month rather than a visit from the CQC.* |

Have questions 1 – 5 been met (GREEN) or there is an action plan in place to mitigate against risk?

No, please use the Action Table which is located below Section 2 before proceeding onto section 2.

Yes, please continue onto section 2.

**Section 2:** Core requirements

Section 2 is mapped against the [Quality Framework (2021-2024)](https://nshcs.hee.nhs.uk/wp-content/uploads/2022/02/HEE-Quality-Framework-from-2021.pdf). The education quality measures assessed below have been adapted and do not directly corelate to the six quality domains of the Quality Framework.

1. **Creating a culture of quality, safety, learning and continuous improvement**
2. **Educational governance and risk management**
3. **Delivering programmes and curricula**
4. **Facilitating learning**
5. **Supporting and developing learners**
6. **Supporting and developing supervisors**

If a quality standard is working towards or not achieved, please use the action plan below to provide further information. Please use the exemplar to help provide evidence for each area. This is not the expectation that providers will have all the exemplars. An example of evidence can be used in several quality standards.

| No. | Quality measurement standard | NHS England education quality standards | Outcome | Comments / Evidence in support of outcome |
| --- | --- | --- | --- | --- |
| 1. **Creating a culture of quality, safety, learning and continuous improvement** | | | | |
| 1 | Learners are hosted in an environment that ensures the safety of staff, learners, and patients; delivers effective, compassionate care; and prioritises a positive experience for patients and service users. | 1.5/1.6 | Choose an item. | Evidence, and good practice, to help complete this section could include:   * Staff or learner mandatory training records, staff / learner induction timetables, incident reporting process, risk assessments, organisational cultures, policies, and processes (data protection, lone worker policies for example).‘Learners are shown all relevant policies as part of their induction and here is the induction timetable....’ * ‘Learners work alongside designated staff/supervised appropriately and we hold a supervisor/assessor/educator list’ |
| 2 | Governance mechanisms are in place for learners, placement providers and HEI’s to identify, raise, act on, and share concerns.  All staff, including learners, are actively supported to raise concerns without fear of negative consequences i.e., about standards of care or learner’s knowledge | 1.7/2.6/2.8/4.7 | Choose an item. | Evidence, and good practice, to help complete this section could include:   * Organisation governance structures with links to workforce and education quality i.e. workforce lead * End of placement evaluations, and raising concerns policy are encouraged |
| 3 | The learning environment is sensitive to the diversity of both learners and the patient population a placement serves.  Evidence of engagement in workforce planning to support the development of learners who meet the needs of the local population.  Evidence of engagement and ownership of equality, diversity, and inclusion to create a learning environment that is fair, inclusive, and supportive of all learners, regardless of background or professional group. | 1.2 /1.3 /1.8/ 2.2/6.3 | Choose an item. | Evidence, and good practice, to help complete this section could include:   * Equality and diversity policies, ensure processes and policies are in place to support individuals with protected characteristics * The population demographic is available and is shared with the learner |
| 4 | The learning environment can demonstrate parity of access to learning opportunities and support for learners with a variety of learning and educational needs, making reasonable adjustments where required.  Any potential differences in educational attainment are identified and addressed. | 1.2/2.3/3.3/3.2 | Choose an item. | Evidence, and good practice, to help complete this section could include:   * Learner timetables that reflect similar educational opportunities for all learners * Ways of working with the university that demonstrate a joined-up approach |
| 5 | Learners are valued members of the healthcare team whilst in the placement area and enabled to actively contribute to the team’s work. | 1.1/1.2/3.8 | Choose an item. | Evidence, and good practice, to help complete this section could include:   * Learners can attend organisational opportunities i.e. training sessions, forums, educational events * ‘We proactively seek learner feedback through placement surveys’ |
| 6 | The learning environment values and champions learning. There is a culture of continuous learning where giving and receiving constructive feedback is both encouraged and routine practice. | 1.1/1.4 | Choose an item. | Evidence, and good practice, could include:   * [name of organisation] engage with National Education and Training Survey (NETS) / National training survey, or other annual cycles of learner experience * Family and Friends data, patient survey data, quality improvement initiatives   Placement evaluation data from the university |
| 1. **Educational governance and risk management** | | | | |
| 7 | There is clear, visible, inclusive, and joined up senior educational leadership, committed to continuous quality improvement of education and training.    Education and training issues are fed into the most senior level of decision making. | 2.1/2.4/2.6 | Choose an item. | Evidence and good practice could include:   * Partnership working with the universities or other organisations who support a culture of education * Clear process to share, and escalate, learner experience to senior educational leaders |
| 8 | Placement evaluations are completed, acted upon, and shared with supervisors / assessors to assure ongoing development of the learning environment. | 2.4/2.6 | Choose an item. | Evidence and good practice could include:   * Feedback from learners, received from university/ through own feedback forms is shared with staff and services * Student evaluations are discussed regularly at staff meetings. |
| 9 | The learning environment works collaboratively with other stakeholder organisations and HEI's to support effective delivery of healthcare education and training; spread good practice; and minimise the impact of service changes on education and training provision and capacity. | 2.7/2.8 | Choose an item. | Evidence and good practice could include:   * The team / service attends practice partners events arranged through the university * The team / service is able to work with all stakeholders through new and existing forums and networks to support educational culture |
| 10 | The learning environment can demonstrate how educational resources (including financial) are allocated and used. | 2.5 | Choose an item. | Evidence and good practice could include:   * Examples of how funding is allocated including …. (Staff/projects/initiatives) * Describe the financial structure to reflect how educational resources are allocated and resources. |
| 1. **Delivering programmes and curricula** | | | | |
| 11 | The learning environment provides suitable educational facilities, including adequate estate, IT systems, library and knowledge services, policies, procedures, and guidelines. | 1.1/1.11/1.12 | Choose an item. | Evidence and good practice could include:   * Learners are encouraged to access library services, journals, undertake case study presentations and support evidence-based practice * Learners are encouraged to spend time with research or quality improvement teams as part of their placement experience (if available) |
| 12 | All learners receive an inclusive and comprehensive induction/orientation into the learning environment. | 1.11 / 3.9 | Choose an item. | Evidence and good practice could include:   * [name of organisation] has a comprehensive induction programme which reflects a diverse placement experience and multiprofessional opportunities (if available) * Learners are given access to IT system, and it is part of their induction. |
| 13 | Timetables and workload enable learners to attend planned / timetabled education sessions needed to meet curriculum requirements. | 5.6 | Choose an item. | Evidence and good practice could include:   * Learners will be included, and clearly identified, in staff rosters * Learners’ shifts are allocated …. weeks in advance |
| 14 | The learning environment has sufficient supervisor/assessor capacity to support all learners.  A record of supervisors / assessors is held.  Supervisors/assessors are highlighted on placement rota’s so all staff can identify when they have a learner working with them and can ensure supernumerary status if required. | 4.2/4.4 | Choose an item. | Evidence and good practice could include:   * Team are aware of the importance of planning initial, midpoint, and final interviews (if needed) to discuss learning outcomes/objectives/ development. * Practice assessors / educators are aware and trained regarding the academic documentation requirements of the learner |
| 15 | The learning environment facilitates the delivery of relevant parts of training programmes and provides learners with a diverse range of learning opportunities, i.e., voluntary, care sector, digital health, across care teams and providers.  Learners are empowered to take responsibility for accessing learning opportunities.  Placement areas work collaboratively with programme leads and stakeholder organisations to coordinate delivery of curricula across placements. | 1.1/1.13/2.7/5.1/  5.2/5.3 | Choose an item. | Evidence and good practice could include:   * The learner can demonstrate their knowledge and understand (that is appropriate to their level of study) * Learners are encouraged to engage with evidence-based practice, and different ways of communication i.e. online/ digital, face-to-face |
| 16 | All learners have access to multi-professional learning and, where appropriate, inter-professional learning opportunities that includes specialist practitioners / consultants. | 1.1/1.12/2.1/5.4 | Choose an item. | Evidence and good practice could include:   * Learners have the opportunity to work with other healthcare professionals including…. * Learners can attend specialist clinics/ meetings, virtual opportunities including…. |
| 17 | The learning environment develops new and innovative methods of education delivery to develop learners who are responsive to meet the changing needs of patients and services. E.g.  a) involving patients, service users and learners in training development and delivery  b) use of technology  c) working with the local Voluntary, Community and Social Enterprise sector  d) peer and group supervision models | 5.4/5.5/6.3 | Choose an item. | Evidence and good practice could include:   * Learners can experience different ways of supporting a patient i.e. virtual clinics, remote, simulation * Learners are encouraged to seek feedback from patients and attend user-led forums i.e. patient participation group. |
| 1. **Facilitating learning** | | | | |
| 18 | Learners are supported to complete summative / formative assessments to meet the learning outcomes for their course, in a timely manner, as per programme requirements. | 1.1/3.7 | Choose an item. | Evidence and good practice could include:   * Placement providers are aware of pastoral care support available from the university * Staff aware of wellbeing training and mechanisms of support. |
| 19 | Learners demonstrate clear understanding of their role and the context of their placement in relation to care pathways, service user journeys and expected outcomes for patients and service users. | 3.10 | Choose an item. | Evidence and good practice could include:   * The team are aware of service user groups and will support the learner to hear from them * The induction provides learners with an opportunity to follow a patient’s pathway of care, or interprofessional opportunities |
| 20 | Learners are supported and developed to undertake supervision responsibilities, relevant to their stage of learning, with more junior staff/students. | 3.11 | Choose an item. | Evidence and good practice could include:   * If there are learners in different years on placement the senior learner is encouraged to be a coach/support more junior student * Learners are part of buddy systems. |
| 21 | The learning environment provides opportunities for learners to engage in quality improvement initiatives which may include improving evidence-based practice, clinical audit, research, and innovation. | 1.9 | Choose an item. | Evidence and good practice could include:   * Learners will undertake a service improvement project, or initiatives i.e. audit or quality improvement * The learner will be offered a ‘Patient and public projects’ |
| 22 | Learners are supported to learn constructively from the experiences and outcomes of patients and service users, both positive and negative. Evidence that students are actively involved in service user feedback and incident reviews. | 1.10 | Choose an item. | Evidence and good practice could include:   * Learners are involved in reflective practice opportunities * Learners are involved in adverse event |
| 23 | Learners receive appropriate careers advice from placement colleagues within the learning environment, including an understanding of other roles and career pathway opportunities. | 4.5/6.2/6.4 | Choose an item. | Evidence and good practice could include:   * The organisation contributes to university careers fairs or open days. * The placement area can give learner careers advice. |
| 1. **Supporting and developing learners** | | | | |
| 24 | Learners receive the supervision and educational support they need to demonstrate curriculum requirements and / or professional standards and, achieve core learning outcomes.  Supervision is tailored to learners’ level of experience, competence, and confidence, and appropriate to their scope of practice, ensuring supernumerary status where required. | 1.1/2.7/3.5/3.6/4.4 | Choose an item. | Evidence and good practice could include:   * Placement providers are aware of pastoral care support available from the university * Staff aware of wellbeing training and mechanisms of support. |
| 25 | Learners know how to seek support and are encouraged to access resources to support their physical and mental health and wellbeing. | 3.1 | Choose an item. | Evidence and good practice could include:   * The team are aware of service user groups and will support the learner to hear from them * The induction provides learners with an opportunity to follow a patient’s pathway of care, or interprofessional opportunities |
| 26 | Supervision arrangements enable learners in difficulty to be identified at the earliest opportunity.  Learners and supervisors / assessors are encouraged to raise concerns and communicate difficulties regarding meeting learning outcomes to HEIs, actively work with them to mitigate avoidable learner attrition from programmes. | 1.1/1.6/1.7/3.4/  4.1/6.1 | Choose an item. | Evidence and good practice could include:   * If there are learners in different years on placement the senior learner is encouraged to be a coach/support more junior student * Learners are part of buddy systems. |
| 1. **Supporting and developing supervisors** | | | | |
| 27 | Supervisors / assessors are supported to access resources to support their physical and mental health and wellbeing | 1.6 / 4.1 / 4.3 | Choose an item. | Evidence and good practice could include:   * Practice assessors / educators given protected time to support learners. * Rotas are clearly able to identify a learner and their assessors, and this is shared with the wider team. |
| 28 | Supervisors / assessors have allocated time to complete learners’ assessments and documentation (formative / summative / interviews etc.) | 4.2 | Choose an item. | Evidence and good practice could include:   * Staff in supervisor/assessor roles given protected time to complete student assessments / reviews. * Learner timetable reflects time with educator / assessor. |
| 29 | The placement area can demonstrate that supervisors / assessors receive constructive feedback on their role, that their training needs are identified in relation to supporting and assessing learners, and how they are supported if considering a formal supervision role. | 4.3/4.6/4.7 | Choose an item. | Evidence and good practice could include:   * Staff are supported with their educational role through appraisal and job roles * Staff are supported with CPD opportunities to ensure they have contemporary skills to help learners |
| 30 | All supervisors/assessors have been appropriately trained (in line with Professional Bodies, Regulators and HEI requirements) and have up to date knowledge of the programmes they are supporting, enhancing their ability to support learners’ progression. | 4.3/4.4/4.5/4.6 | Choose an item. | Evidence and good practice could include:   * Advice is given regarding arranging further training/update sessions. * Staff have attended a university training session to support their understanding of the curricula/PAD. |

## Ongoing monitoring tool

Please complete the table below to show compliance after the first placement with new learners and then on a three yearly cycle (providers do not need to complete the approval tool every 3 yrs. unless specified).

|  |  |  |  |
| --- | --- | --- | --- |
| **Education Provider Name:** |  | **Placement Provider Name:** | Residential home / hospice / service division / surgery / specific private practice |
| **Full Address of Placement areas Inc Postcode and Tel No.** |  | **Type of Learners incl. regulator** |  |
| **Names of individuals completing this tool and designation** |  | **Areas within approval i.e. service, ward, surgery, clusters** |  |
| **What data has been reviewed to provide assurance of the learning environment?** | Annual reporting self-assessments, internal reports, adverse incidents, good practice, feedback, surveys, evaluations, networks / forums, NETS / NTS, service users. | **Summary of discussions – please ensure both placement and education providers are present. Please refer to exemplar for suggested discussion areas, and review action plan in approval tool as required.** | Link across to any ‘working towards’ / ‘not achieved’ from the approval tool, or subsequent action plans.  Checklist of discussion points:   * Placement induction / orientation * Supervision of learner * Support for learner or educator (training, protected time & space) * Communication between partners * Teaching and learning opportunities * Placement experience / raising concerns * Culture (respect, positive identity) * Preparation for practice / curriculum * Wellbeing of learner and staff * Workforce / service changes   We would recommend referring to the Safe learning environment charter maturity matrix <https://learninghub.nhs.uk/Resource/46263/Item> |
|  | | | |
| **Actions Plan – please describe any subsequent action following discussions. Providers can use the quality concerns (outlined below) to help support escalation processes.** | |  | |
| **Date of Process Completed** |  | **Is there a concern for the learning environment?** | Choose an item. |

**Action plan table**

This action plan table has been developed as part of the assurance process. It can be used as part of the approval tool to illustrate when a quality standard is either working towards, or not achieved, following the [ongoing monitoring tool](https://wessex.hee.nhs.uk/quality/quality-learning-workplace/multi-professional-quality-assurance-toolkit/) or when supporting a concern of the clinical learning environment ([escalation and triangulation guidance](https://wessex.hee.nhs.uk/quality/quality-learning-workplace/multi-professional-quality-assurance-toolkit/)).

| Standard ID | Area for Development | Proposed Action/s to be taken | Outcome required (include timescales) | To be completed by (person responsible) and date of review | Review completed by whom and date of review |
| --- | --- | --- | --- | --- | --- |
| *Example No 1* | *Need to identify spoke opportunities and a way of recording these on the rota when students are attending* | *Student information pack to be updated with range of spoke opportunities.*  *Practice assessor / supervisors to note this against student’s rota entry* | *To develop a rota template with spoke opportunities* | *Ward Manager / Student Lead*  *May 2025* | *June 2025* |
| *Example*  *No 2* | *Need to identify registered professional to provide practice assessor for nursing students in local authority.* | *Approach local NHS community trust to explore opportunities for practice assessor to provide long-arm supervision* | *To provide long-arm supervision to local authority from NHS trust* | *Local authority educational lead February 2025* | *March 2025* |