Educational Supervision –
Roles and Responsibilities

Educational Supervision in KSS Deanery

1.0 Overview

1.1 The purpose of this document is to outline the role and responsibilities of Educational Supervisors working in postgraduate medical education in the KSS Deanery in relation to Foundation and Specialty Training.

1.2 This guidance may also support NHS Trusts, LFGs and LABs in their quality control as they educationally support, manage, audit and resource the educational role of Educational Supervisors within NHS Trust in the KSS region.

1.3 This guidance is mapped to the Gold Guide to Specialty Training (2008); Postgraduate and Education Training Board (PMETB) Standards for Curricula: Standard 5; PMETB Standards for Trainers (PMETB, January 2008); the Foundation Programme; the KSS Deanery GEAR for LFGs and for LABs.

1.4 Education and training for all consultants who wish to qualify as Educational Supervisors, offered by the KSS Education Department, is outlined.

1.5 The role of Educational Supervisor is supported by the Local Faculty group and Local Academic Board infrastructure within KSS and the KSS Deanery GEAR. The requirements of the PMETB Generic Standards for Training and KSS GEAR are mapped below.

2.0 Scope of the role in KSS

2.1 The approach taken in KSS is to educate and train all hospital consultants as Educational Supervisors and on a long-term programme, which promotes those currently in the role. We see the role of Educational Supervisor as distinct from, but having points of overlap with, that of Clinical Supervisor. By educating and training all consultants as Educational Supervisors, we ensure the robustness of education and training for all clinical supervisors, while ensuring that those who wish to take on a more expanded role of Educational Supervisor are also equipped to do so. Organisationally, the formal roles of Clinical Supervisor and Educational Supervisor are disaggregated for the purposes of job planning.

3.0 Definitions

These have been updated from the PMETB Quality Framework Operational Guide

3.1 Educational supervision

The revised definition of educational supervisor is:
“A trainer who is selected and appropriately trained to be responsible for the overall supervision and management of a specified trainee’s educational progress during a training placement or series of placements. The Educational Supervisor is responsible for the trainee’s Educational Agreement.”

3.2 Clinical supervision

The revised definition of clinical supervisor is:

“A trainer who is selected and appropriately trained to be responsible for overseeing a specified trainee’s clinical work and providing constructive feedback during a training placement. Some training schemes appoint an Educational Supervisor for each placement. The roles of Clinical and Educational Supervisor may then be merged.”

4.0 Educational Supervisor role and responsibilities

This is a complex role which spans the areas of educational management, educational supervision and feedback, clinical supervision, an understanding of the role of assessment in learning, the use of portfolios as a learning and assessment tool, an understanding of how to identify, support and manage a trainee in difficulty, and of supporting trainee career decision making.

The PMETB Generic Standards for Trainers (Jan 2008) are met in the outline of role and responsibilities of trainers as given below. These Standards are also met in the KSS GEAR for Local Faculty Groups.

The PMETB Standards for Trainers are:

Standard 1: trainers must provide a level of supervision appropriate to the competence and experience of the trainee
Standard 2: trainers must be involved in and contribute to the learning culture in which patient care occurs.
Standard 3: trainers must be supported in their role by a postgraduate medical education team and have a suitable job plan with an appropriate work load and time to develop trainees.
Standard 4: trainers must understand the structure and purpose of, and their role in, the training programme of their designated trainees.

4.1 The Educational Supervisor (Educational Management)

The Educational Supervisor:

4.1.1 enables trainees to learn by taking responsibility for patient management within the context of clinical governance and patient safety (PMETB Generic Standards for Training Mandatory requirement 6.25 and LAB GEAR 1.3.1);
4.1.2 understands and demonstrates ability in the use of the approved in-work assessment tools and is clear as to what is deemed acceptable progress (PMETB Generic Standards for Training Mandatory requirement 6.26 and LAB GEAR S1.1);
4.1.3 regularly reviews the trainee’s progress through the training programme, adopts a constructive approach to giving feedback on performance, advises on career progression and understands the process for dealing with a trainee whose progress gives cause for concern (PMETB Generic Standards for Training Mandatory requirement 6.27 and LAB GEAR S4.vi);
4.1.4 ensures that clinical care is valued for its learning opportunities; learning and teaching must be integrated into service provision (PMETB Generic Standards for Training Mandatory requirement 6.28 and LAB GEAR 3.1);
4.1.5 liaises as necessary with other trainers both in their clinical departments and within the organisation to ensure a consistent approach to education and training and the sharing of good practice across specialties and professions (PMETB Generic Standards for Training Mandatory requirement 6.29 and LAB GEAR 4);

4.1.6 is responsible for the educational progress of a trainee over an agreed period of training (in KSS this is normally of a year’s duration) set against knowledge of a mandated curriculum (LAB GEAR S1.1);

4.1.7 undertakes supervision of a trainee, giving regular, appropriate feedback according to the stage and level of training, experience and expected competence of the trainee (LFG GEAR S1.11 and S1.12);

4.1.8 undertakes or delegates assessment of trainees as appropriate, has been trained in assessment and understands the generic relationship between learning and assessment and particularly that within a specific curriculum (LFG GEAR S7.1);

4.1.9 meets with trainees at agreed, specified times in accordance with the requirements of foundation or Specialty curricula (LFG GEAR S1.11 and S1.12);

4.1.10 liaises with clinical supervisors to gain an overview of trainee progression (LFG GEAR S2.6);

4.1.11 attends Local Faculty Group meetings as required and disseminates relevant information to clinical supervisors and trainees as appropriate (LFG GEAR S2.6);

5.0 Educational meetings: initial

Arranges to meet trainees at the beginning of each rotation to:

5.1 check that the trainee has received a local induction;
5.2 ensure that competency check lists have been completed;
5.3 ensure that the trainee has relevant Handbooks; Specialty, Faculty etc.;
5.4 discuss trainee learning needs, how these will be developed and which assessment methods will be used to evaluate whether the trainee is meeting required competencies;
5.5 record all meetings, outcomes of meetings as required and communicate these to trainee, Faculty Group, Training Programme Director as appropriate;
5.6 discuss the range of evidence that might contribute to the building of a portfolio of trainee progression;
5.7 review the trainee’s portfolio at each meeting and adapt / monitor learning needs in relation to curricula requirements.

6.0 Education meetings: mid point

Meet the trainee at the mid point of each rotation to:

6.1 discuss progress to date, and review progress. If necessary amend learning outcomes;
6.2 discuss taster opportunities if appropriate and ensure that these are relevant and appropriate to career intentions;
6.3 review learning portfolio and support trainee development of evidence of competency;
6.4 ensure that the trainee is appropriately engaging in the assessment process, learning from this and achieving the expected competencies for the stage and level of training.
6.5 negotiate remedial efforts if required.

7.0 Education meetings: end point of rotation
Meets the trainee at the end of each rotation to:
7.1 review progress to date in relation to the requirements of the curriculum;
7.2 ensure that all appropriate assessments have been completed, review with the trainee which competencies have been met; and amend professional development plan as appropriate, noting what needs to be carried forward to the next rotation and forward plan future trainee learning needs;
7.3 ensure that all relevant documentation has been completed.

8.0 ARCP appraisal, assessment and annual planning (Gold Guide 7.8 ff; Gold Guide page 70 and Appendix 4)

8.1 The Educational Supervisor is responsible for bringing together the structured report which looks at evidence of progress in training and for undertaking work-based appraisals with their trainees (NHS Appraisal). In the Foundation Programme the Educational Supervisor signs off the Foundation Achievement of Competency Document (FACD), which is then countersigned by the Training Programme Director.

9.0 Appraisal and revalidation

9.1 Appraise trainee annually as appropriate using the NHS Appraisal Documentation, which can be found at:
www.dh.gov.uk/en/Policyandguidance/Humanresourcesandtraining/EducationTrainingandDevelopment/Appraisals/DH_4031937

10.0 Educational supervision and local faculty development

10.1 The KSS Deanery offers a range of professional development programmes. Specifically it offers the QESP, Part One: the Certificate in Teaching and Part Two: the Certificate in Educational Supervision. This two-part programme is the KSS Deanery’s qualification for those undertaking the Educational Supervisor role. Details of this and other professional development programmes for Local Faculty and Educational Supervisors, such as the MA in Clinical Education, the Postgraduate Certificate in Managing Medical Careers, and Supporting Trainees in Difficulty can be found at:
http://education.kssdeanery.ac.uk/fac_dev-AccreditedProgrammes.php

Copies of GEAR for LFGs and LABs have been distributed to NHS Trusts in the KSS region. If you would like copies, please contact Steven Wallace at KSS Deanery: swallace@kssdeanery.ac.uk or 020 7415 3417.