

# Learning Environment Approval Visits

Guidance



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## Introduction

This guidance for Training Hubs covers the suggested approach to preparing and conducting a site visit for new Learning Environments within the Midlands region.

Whilst on-site visits should be the first consideration, particularly for new practices, virtual assessments can take place and are useful for those practices expanding their training capacity or expanding to become a PCN learning environment. Training Hubs should use their discretion following a review of the application form and triangulated evidence to determine if a site visit would add to their assurance processes.

Anyone involved in the visiting process should also familiarise themselves with the Standard Operating Procedure for Primary Care Learning Environment Approvals and its associated appendices.

## The Visiting Process

### 1. New Learning Environment Application Form

On receipt of the Learning Environment Application Form, the Training Hub should firstly ensure that all the relevant sections have been completed fully and conduct a triangulation of evidence exercise by reviewing CQC website, NHS Choices, and by obtaining TPD, HEI (if relevant), ICS and learner feedback. It may also be possible for the Training Hub to review the latest NETS surveys.

Any concerns or gaps in information at this stage should be discussed within the Training Hub Quality Team. Additional information may be requested from the Learning Environment prior to arranging the visit. For example, the Training Hub may legitimately ask for more information about a poor CQC rating so that the right questions can be framed for the visiting team in preparation for their time on site.

### 2. Arranging the Approval Visit

The Training Hub Quality Lead / Administrator should liaise with the Learning Environment and the Training Hub visiting members to reach a mutually convenient date for the visit. For a single practice visit approximately 2 hours should be sufficient, but complex Learning Environments such as a large PCN, will take longer. It is not a requirement for the Training Hub visiting team to conduct a site visit for each practice or premises aligned to the PCN but the team will spend more time in assessing the culture and governance arrangements within an 'at scale' Learning Environment.

As a suggestion, 2 weeks prior to the visit date, the Training Hub should send the Learning Environment an agenda (Appendix 1) and a 'What to Expect' brief (Appendix 2). Prior to this the Training Hub visiting team should determine how the visit is going to be run and who will lead on what aspect i.e., the division of interviews etc. Appendix 3 provides some suggested 'prompts' for interview questions.

### 3. Conducting the Visit

The visiting team should arrive promptly and follow the set agenda. If the template agenda (Appendix 2) is followed, the visiting team have an opportunity for any last-minute discussions amongst themselves before dispersing and interviewing key members of the practice education and management team and should include where possible learners on site. It is not necessary for the visiting team to scrutinise policies and procedures but rather; they should attempt to gain an understanding of how things work within the Learning Environment, paying particular attention to the safeguarding of future learners and the patients that they will encounter. The interviews should be framed around the Learning Environment application form and tease out assurance of compliance or any areas of concern.

This is not a formal inspection of the premises, but the visiting team will be able to make a judgement of the space and its suitability for high quality care and for the accommodation of learners.

Once all interviews have been conducted, the visiting team will reconvene to share their findings that will contribute to a final assessment and recommendation that will be made to the WT&E Quality Recognition Recommendation Panel (QRRP), and this should be shared along with any areas of good practice or areas for further action to the Learning Environment before the visiting team departs.

### 4. Post Visit

The Training Hub Quality Administrator will notify the QRRP of its recommendation by following the Standard Operating Procedure.

#### **Managing Conflicts of Interest**

Alternative arrangements for approval visit or panel members should be made when:

- The member concerned works for the Learning Environment being approved or did so within the last year.
- The member concerned works in the same Learning Environment as the educator being approved or did so within the last year.
- The member concerned works in the same super-partnership or Primary Care Network or did so within the last year. The only exception to this might be where the organisation is divided into sub-groups which are managed separately, and the member concerned works in a different sub-group.

Local sensibilities should always be considered and, where necessary, advice taken from the TPD or AD lead for Quality, Primary Care Dean(s).

## Appendix 1

### Timetable for Learning Environment Visits Approval Visit

**Date:**

**Time:**

**Learning Environment Address:**

Visiting Team	
Name	Role

Proposed Agenda (indicative timings)	
09.00	Visitors arrive
09.15	Planning time for the visiting team
09.30	Tour of premises: all visitors
10.00	List of interviewer and interviewees:
10.45	Visiting team meets to agree feedback
11.00	Feedback to Learning Environment members
11.10	Close of visit

## Appendix 2

### 'What to Expect'

#### A Guide for Learning Environments Undergoing Approval Visits

On receipt of your application form, the Training Hub Quality Administrator and Quality Lead will be convening a visiting team and liaising with you on the timetable for the visit day. They will also give you an indication of the numbers and roles of the visiting team which will be explicitly stated on the final agenda that will be sent to you in advance of the date agreed.

In some circumstances the Training Hub may decide to conduct a virtual visit e.g., any established Learning Environment expanding their capacity or expanding to form a PCN Learning Environment.

In either event the Training Hub will follow the same process described here.

They will also be undertaking relevant pre-visit checks such as reviewing CQC web portal, NHS Choices, professional regulatory body web sites etc., as appropriate. These checks will reflect the Quality Domains within the application form you have submitted.

The visit itself will take approximately 2 hours to complete and the visiting team will need a room in which to base themselves and to convene as a team to conduct any final discussions about your application and to assimilate their findings following the on-site interviews.

If your application is for expansion as a PCN Learning Environment, the visit may take longer but the visiting team will not visit every site within your PCN. However, it is important for you to demonstrate how you will manage and monitor learners, particularly those who may be placed in historically non-training practices within your PCN.

The visit is not intended to 'catch you out' but rather a two-way process for the Training Hub team to gain assurance on your suitability as a recognised Learning Environment and for you to ask any questions you may have about hosting learners.

The visiting team are mindful that they will be entering a busy patient-facing service area and will work with you to ensure service disruption is kept to an absolute minimum and that confidentiality is always maintained.

Providing an escorted site tour is very useful for the visiting team in terms of orientation and to help them form a view of the environment learners will be working in (see note above re PCN visits).

It will not be necessary for the visiting team to access any active patient/professional interventions, activities or records.

For staff being interviewed as part of the visit, these are semi-structured and informal and will focus on the application form you submitted and about how the Learning Environment functions and its culture.

Shortly before the conclusion of the visit, the visiting team will decide on a recommendation that will be shared with you before they leave. This recommendation will then be forwarded by the Training Hub to the WT&E Quality Recognition Recommendation Panel held every month by the Primary Care School for ratification at which point any regulatory bodies will be notified as appropriate.

Once ratified, the Training Hub will notify you formally of the outcome and confirm this with the relevant HEI or TPDs as appropriate for the learners you will be accepting.

## Appendix 3

### Suggested 'Prompts' for Approval Interviews and Visits

#### Interview with learners

*[N/A if this is a new Learning Environment with no current learners]*

##### General

- How are you getting on?
- Induction:
  - Did you receive an introductory pack?
  - What induction did you have?

##### Patient Care

- What about consultation times?
- What is the role of the GP trainee/multi-professional learner in the practice?
- Prescribing issues
- Audit: Who teaches you audit?
- What out of hours work do you do?
- Who supervises you?

##### Communication

- Partners
- Practice Manager
- Educators
- Communication within the practice
- Practice meetings (clinical and business)

##### Practice Organisation

- Are you clear on the management structure within the practice?
- Are you clear about areas of responsibility?
- What evidence do you have for teamwork?

##### Personal and Professional Development

- How do you learn best?
- How is your trainer helping you in this area?

- What are your aspirations?

### **Structure and Process of Training**

- Space and time?
- Development of teaching programme
- Methods Used
- Feedback and assessment process
- Contribution of wider team to learning opportunities

### **Interview with the Partners/Practice Team**

#### **Professional Values**

- As a practice, what do you aspire to?
- What are your values?

#### **Good Patient Care**

- Examples?
- How do you know?
- What are the barriers?
- What is the role of audit and quality improvement activity and who takes responsibility for this?

#### **Communication**

- With each other
- With the learners

#### **Practice Organisation**

Meetings:

- Clinical
- Management
- Who is in the primary health care team?
- What is the structure?
- How does the learner fit in?
- Are there any areas of no access to the learner?

### **Interview with Practice Manager**

### **The Learning Environment**

- Do the premises limit the practice's effectiveness in any way? Please comment on tidiness, cleanliness and poster displays etc.
- What improvements do you suggest?
- Comment on the organisation of the staff.
- What meetings are held in the practice? Comment on their effectiveness.
- Do you think that the practice would function better with more (or less) meetings or differently organised ones?
- How is teamwork fostered?
- How are the staff involved with the development of the practice?
- How are staff appraisals conducted?
- Do the staff have written contracts of employment?
- What does the generic work schedule like?
- Comment on the involvement of patients in the organisation and development of the practice.
- How does the practice respond to patient complaints?

### **Teaching, Learning and Training**

- Is the manager, and other members of the team, involved in teaching the trainee/multi-professional learner?
- Do they have a clear idea of the aims of training and of the contribution the trainer asks them to make? Are they, for example, briefed before the trainee sits in with them or has teaching sessions with them?
- Is their feedback requested and are they aware of how any such feedback is used in assessment of the trainee?
- What is the team's commitment to teaching and learning?
- What arrangements are there for the protection of the learners teaching time (are staff, for example, allowed to interrupt tutorials?)