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Making
EDUCATION GOVERNANCE
a reality in the North West

What it means to NHS organisations and
a guide to its successful promotion and adoption

Contents

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Being committed to learning is essential to the success of any NHS organisation.

Not only does it ensure a workforce that has the skills and knowledge to provide excellent healthcare services, but it also helps organisational objectives to be met and engenders an ability to adapt to change.

Recognising the fundamental role education and learning has in achieving real service improvement, we at NHS North West have consulted on a strategy to support the development of the workforce[1].

This strategy, which is aligned to key health service priorities for the population of the region, is based upon the need for robust workforce planning, the delivery of world-class education commissioning and enhancing the quality of learning experiences and infrastructure. It makes a number of pledges. One of these pledges is the commitment to support NHS organisations in promoting and establishing the adoption of an Education Governance framework.

Although for some Education Governance might be an unfamiliar term, its principles should be recognisable and, to some degree, already evident within most NHS organisations.

Similar to that of Clinical Governance, its purpose is to embed accountability, transparency and continuous improvement into an organisation's culture – in this case within the education, learning, development and knowledge management function.

This document aims to define Education Governance, set out its benefits, describe the way in which NHS North West will support this agenda and provide guidance on making it a reality in your organisation. We hope you find this to be a valuable resource in the weeks and months to come.

Dean Royles
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NHS North West

[1] NHS North West (2008) The Workforce, Education Commissioning and Education and Learning Strategy available from www.northwest.nhs.uk/UserFiles/File/Misc%20publications/3892_NW_Main%20DocAll.pdf

Chapter 2
Education Governance defined

"…the term used to describe the systems and standards through which organisations control their educational activities and demonstrate accountability for the continuous improvement of quality and performance."[2]

Definitions aside, what does Education Governance mean in practice?

We believe that NHS organisations which are really committed to its adoption are able to demonstrate that:

- the corporate management and governance of education and learning is formalised within their organisational structures, with Board-level responsibility and accountability for education

- Education Governance has the same priority as Clinical Governance

- there is open, transparent, accessible, clear and equitable opportunities for the whole workforce

- there is a multi-professional governance approach, with enhanced learning leadership, enabling best practice to be shared across all healthcare disciplines and across all levels of staff involved in the delivery of health services

- the quality of healthcare education and learning is improved continuously in the context of its importance in improving the quality of patient care

- there is a single quality framework for education and learning, minimising the burden of multiple inspections by external regulators

- there is a risk management approach to quality improvement, with clear action plans and transparent reporting processes

- all healthcare staff, patients, service users, students, trainees and learners are actively involved in education and learning processes so that Education Governance remains relevant and responsive to needs

- there is effective partnership working across placement and education providers and specifically between employers and education to inform the planning, delivery and assessment of education in practice and academic settings

- educational and learning activities are focused on outcome and quality of the learning experience and represent the best and most effective use of education investment and resources

- capacity and capability to improve work-based education and learning in practice is enhanced continuously.

Benefits at a glance

- Improvement in the quality of healthcare services and patient safety.

- Development of a more effective and flexible workforce.

- Employers are able to match the education and learning they commission with the skills needed in the workforce.

- Retention of staff and improved staff morale.

- Improved recruitment as a preferred employer.

- Delivery of educational activities based upon best evidence and impact.

- Improved learner satisfaction and enhancement of learning infrastructure and resources.

- Reduction of inequalities in access to education and learning opportunities and resources.

- Transparency in the way education and learning priorities are supported and measured.

- Better understanding of the value and the contribution of education and learning in achieving organisational purpose and priorities.

- Innovation in education and learning activities.

- Improved efficiency through a single quality framework for education.

- Improved team working across all staff groups.

[2] NHS Scotland (2007) Education Governance: A defining review available from http://www.nes.scot.nhs.uk/about/educational_governance/documents/EducationalGovernance_DefiningReview270907.pdf

Chapter 2 Education Governance defined

Helping you become a Learning Organisation

Organisational growth and development does not happen by itself. It needs to be planned, resourced and its impact continually evaluated. This approach is the hallmark of an effective Learning Organisation – and the principle that underpins Education Governance.

Aspiring Learning Organisations should be able to demonstrate that:

- there is **awareness** at all levels of the organisation that learning is necessary and valued as part of organisational development

- the **environment** encourages innovations and promotes information sharing between employees, creating a more informed workforce. An organisational culture is in place, which encourages questioning, openness and reflectivity and accepts error and uncertainty

- there is **leadership** commitment to both individual and organisational learning. There is Board-level investment in making resources available (finance, personnel and time) to determine the quantity and quality of learning

- the locus of control shifts from organisational managers to **empower** employees' equal participation in learning at all levels.

Structures and processes that will govern and drive improvements in the management of education and learning activities must be in place to achieve Learning Organisation status. Effective Education Governance offers one of the frameworks for bringing this about.

> "A Learning Organisation is designed to improve the personal/professional development and performance of its entire workforce. Through the process of organisational learning (experience, dialogue, experimentation, learning from one another), healthcare establishments attempt to change their cultures and systems to improve their overall outcomes."
>
> **University of Salford 2005**[3]

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[3] University of Salford (2005) A Learning Organisation Assessment Tool for the Greater Manchester Strategic Health Authority.
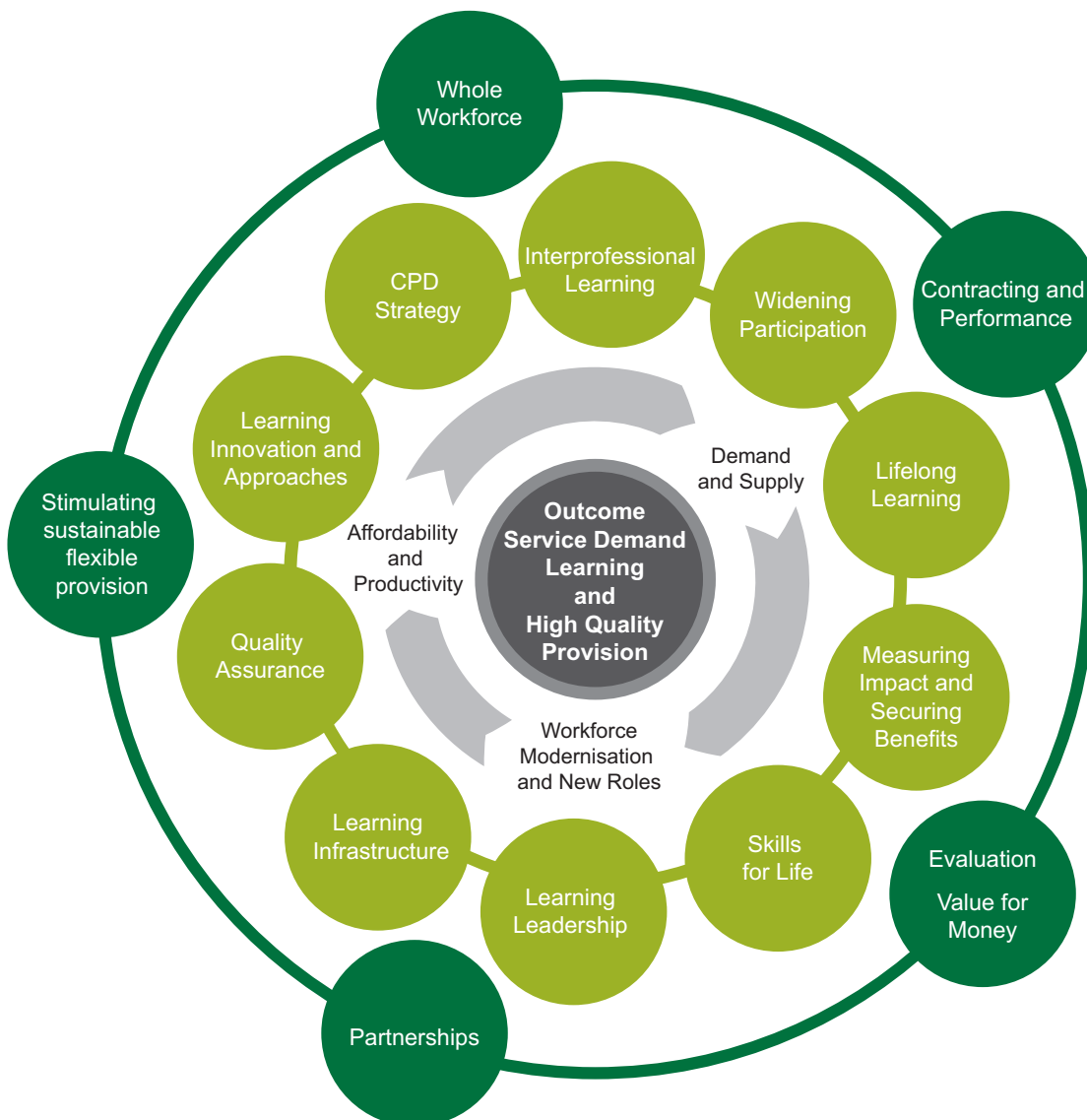
Chapter 3
Making it happen

Alignment with your education and learning strategy

Although systems must be developed to realise the benefits set out earlier in this document, Education Governance must be more than a process. Its focus, scope and structures must be aligned with the delivery and priorities of a comprehensive, organisation-wide education and learning strategy responsive to the training and development needs of all levels of staff.

The development of such a strategy is crucial if organisations are to utilise investment to improve services in line with national priorities and adapt to the changing education and learning landscape.

The diagram below identifies the components that need to be included in this strategy if it is to be comprehensive, capable of anticipating and being responsive to change.

Whole Workforce

Interprofessional Learning

CPD Strategy

Widening Participation

Contracting and Performance

Learning Innovation and Approaches

Demand and Supply

Lifelong Learning

Stimulating sustainable flexible provision

Affordability and Productivity

Outcome Service Demand Learning and High Quality Provision

Quality Assurance

Measuring Impact and Securing Benefits

Learning Infrastructure

Workforce Modernisation and New Roles

Skills for Life

Evaluation Value for Money

Learning Leadership

Partnerships

The four key priorities

Organisations embarking on the Education Governance journey should consider the following four issues:

1

Education and learning strategy

For those organisations that have an education and learning strategy in place for the whole workforce, as described on the previous page, this should be reviewed, updated and specifically include details of how the organisation will enhance its Education Governance arrangements. For those organisations without a defined education and learning strategy, the development and Board-level approval of this, including initial Education Governance is an early priority.

2

Self-evaluation

The value of Education Governance will be more apparent when organisations are motivated by their own quest for education quality improvement rather than just responding to external demands. Therefore, establishing a cycle of self-evaluation is an initial first step. To guide this evaluation, organisations can utilise several tools to assess their current status. **Appendix 1** offers some suggested benchmark statements that organisations can use to assess the adequacy of their education management arrangements and use them to generate a development plan for all levels of staff.

3

Establishing an Education Governance Board

It is recognised that many organisations already have formal organisational structures in place to oversee the management of education activity. An early priority is to assess the adequacy of these existing structures and ensure that Board-level leadership is evident. Organisations should identify a Board member with specific accountability and responsibility for leading education and learning activities. Then the organisation should establish, in the absence of an existing fully integrated governance structure, an Education Governance Board. **Appendix 2** identifies suggested terms of reference and membership for this Board.

4

Education and learning measures

Early activity is needed to identify and put in place the processes for capturing and reporting the impact of education and learning activities. These measures need to be systematic and move beyond data that is easy to capture towards being more meaningful in enabling the organisation to assess the impact of education and learning. **Appendix 3** identifies an initial set of measures that should be routinely assessed and reported.

Chapter 3   Making it happen

Chapter 4

NHS North West supporting you

At NHS North West we are committed to helping you make Education Governance – and all the improvements in learning and development it will bring – a reality.

To that end, we will:
- provide and facilitate the sharing of best guidance and support investments that encourage the adoption of Education Governance

- formally secure the commitment of organisations to commence the adoption of Education Governance through:
  - Learning and Development Agreements (LDAs) with placement providers
  - Education Contracts with Higher Education Institutions (HEIs)
  - reviewing the delivery of the Partnership Agreement arrangements between placement providers and HEIs
  - supporting new ways of working.

- implement an agreed single multi-professional quality monitoring and improvement framework to monitor the Learning and Development Agreements with placement providers in the North West

- implement an agreed quality monitoring and improvement framework for managing Education Contracts with North West Higher Education Institutions

- with the North West Leadership Academy, identify the required leadership competencies and support a development programme that will equip those charged with leading and managing education activities with the skills to innovate and embed improvements

- enable and promote the sharing of best practice relating to education and learning within and across organisations.

This will be undertaken as required through the performance expectations of the NHS Operating Framework 2009[4].

BETTER CARE | BETTER HEALTH | BETTER LIFE

Factor 1: Education and learning leadership

Best Practice

Score   0 ←——————————————————→ 10

| There is no accountable member of the Board with responsibility for education and learning activities. | There is an accountable member of the Board who is responsible for leading and reporting education and learning activities. |

Indicators
- There is a named organisation Executive with Board responsibility for education and learning activities.
- The accountable lead seeks and has mechanisms in place to communicate, consult and disseminate information related to education and learning issues throughout the organisation.
- Organisational teams are aware of the Executive with responsibility for education and learning and understand the mechanisms by which they can raise/discuss education/work based learning issues.
- There is direct and close liaison between the lead Executive and the education and training function to ensure that all education and learning activity is fully represented to the Board.
- All Senior Managers demonstrate commitment to staff development and communicate this to employees.
- All Senior Managers ensure that there is a systematic enabling of education and learning activities to be undertaken.

Factor 2: Education and learning strategy

Best Practice

Score   0 ←——————————————————→ 10

| There is no whole organisation workforce education and learning strategy. | There is a whole organisation workforce education and learning strategy, which has been approved and its implementation regularly reported by the nominated member of the Board. |

Indicators
- There is a current whole workforce education and learning strategy with clear links to organisational objectives, service improvement and patient outcomes.
- The strategy is supported by an annual plan based upon formal training needs analysis for all levels of staff/staff groups.
- The strategy and delivery of the action plan are formally and regularly reviewed and amended.
- The organisation's approach to education and learning is reflected in its corporate mission statement and values.

Factor 3: Education and learning plan

	Best Practice
Score 0 ←————————————→	**10**

| There is no current education and learning plan.	The approved education and learning strategy is delivered through an annual education and learning plan, with priorities for action mapped to current organisational and workforce priorities.

Indicators
- There is an annual education and learning plan that is publicly available.
- The education and learning plan supports workforce modernisation.
- The organisation has a formal and robust personal development system in place for the whole workforce.
- Education and learning needs are based upon training needs analyses (TNAs) and are linked to current and future job roles for all staff.
- The education and learning plan is formally endorsed at Board level.
- There are allocated and sufficient resources to enable the delivery of the activities within the plan.
- There are named operational leads within the organisation with responsibility for delivery of the education and learning plan.
- All programmes and learning interventions are mapped to key workforce and Knowledge and Skills Framework (KSF) competencies.
- All programmes and learning interventions are mapped to required clinical and educational standards.

Appendix 1 **Examples of potential benchmark statements to support Education Governance**

Factor 4: Engagement with service users and consumers of education and learning

Best Practice

Score   0 ⟵⟶ 10
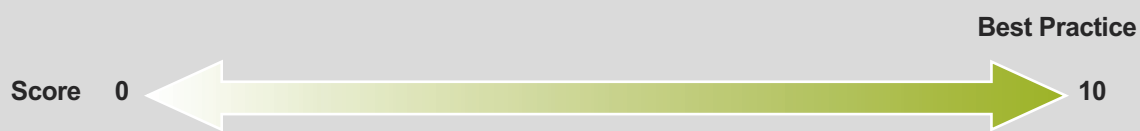
There are no or limited attempts at ensuring education and learning activities are informed by the needs of patients, service users and learners.	All education and learning activities are directly informed by the needs of patients, service users and learners.

Indicators
- There is a service user involvement strategy that engages users in the process of Education Governance.
- The service user involvement strategy includes a protocol for gaining consent of service users and carers for their involvement in learning activities.
- There are resources available to undertake required service user involvement activities.
- There is close liaison with the PALS/engagement leads in the organisation to draw upon intelligence provided by patients and service users regarding their experience of care.
- There is commitment to, and regular review of, patient complaints systems and error review systems for lessons learned and any implications for education and learning.
- There are systems and processes in place to evaluate learners' learning and development experiences.
- Service and learner involvement is evident in all quality assurance procedures/reviews.
- Engagement mechanisms with service users and learners are culturally sensitive.
- Prior to the design and delivery of any new programme, there is a formal process of engagement with service users and potential learners.
- Levels of service user involvement in education and learning activities will be monitored annually and actions taken to respond to findings.

Factor 5: Systematic measurement of education and learning activity

Best Practice

Score	0		10

There are no or only limited attempts to measure the impact of education and learning activities.	There are comprehensive, systematic data collection processes in place designed to measure all aspects of education and learning activities.

Indicators
- There is a set of organisation-wide clinical and educational standards and monitoring systems in place to ensure high quality learning.
- All education and learning activity is routinely measured.
- There is a set of measures which form a corporate education and learning dashboard/traffic light indicator and these are used to trigger appropriate interventions.
- Prior to the design and delivery of any new programme there is a formal identification of the measures to be used to evaluate the impact of the programme.
- There is a development programme in place to support education and learning staff in the use of education measurement tools/approaches.

Factor 6: Evaluation of education and learning activity

Best Practice

Score	0		10

There is no formal or regular evaluation of education or learning activity.	All education and learning activities are regularly and formally evaluated within the context of effectiveness in meeting required service and workforce requirements, equality of access and value for money.

Indicators
- The organisation has an expressed commitment to quality improvement in its approach to education and learning.
- There is a formal rolling programme for evaluating all education and learning activity.
- An evaluation strategy is developed as part of the planning and design of any new programme.
- There is a development programme in place to support education and learning staff in the use of education measurement tools/approaches.
- Service users, learners and staff are directly involved in evaluation activities.
- The organisation shows considerable commitment to participating in quality monitoring and improvement processes with education providers.
- Evaluations are used to improve education and practice at local and organisational level.

Appendix 2

Suggested terms of reference and membership of an Education Governance Board

Core terms of reference

- Provide leadership and direction on all matters relating to education and learning.
- Ensure an appropriate multi-professional education and learning strategy is in place and aligned with organisational and workforce priorities.
- Systematically monitor and evaluate the progress of the education and learning strategy.
- Define the performance indicators and put in place the structures and processes to evaluate progress.
- Maintain ongoing monitoring of the quality and value for money of both internal and external education and learning services provided to the organisation.
- Set out and support the implementation of an annual multi-professional quality plan designed to improve the quality and effectiveness of education and learning activities, and to support the Learning and Development Agreement process.
- Monitor and facilitate compliance against external education performance standards, good practice and guidance.
- Identify, monitor and control risks relating to the delivery of high quality education and learning activities.
- Recommend to the Board the allocation of resources against education and learning priorities.

Suggested membership of the Education Board

This should be a multi-professional group with membership including:

- Board Education Lead
- Non-Executive Director
- Medical and Nursing Directors
- Human Resources Director
- AHP Lead
- Librarian
- Education Leads
- representatives from Directorates/Divisions
- Education and Development Manager
- Research and Development Lead
- Service Improvement Lead
- Clinical Governance Lead
- Student and Trainee representatives
- Lay representatives
- Management/Leadership Leads co-opted as required.

Appendix 3
Measuring education and learning activity

We often measure the 'easiest' things as opposed to those that are difficult and meaningful. For that reason there is potentially an inverse relationship between what is measured and what is desired by organisations.

Some suggestions for indicators that need to be systematically measured are listed below.

Organisational compliance:

- impact upon patient care, service and workforce development
- degree of compliance with quality and external organisational standards (Standards for Better Health, NHS Litigation Authority, Postgraduate Medical Training Education Board Standards)
- outcomes of external education accreditation reports
- assessment of return on investment
- equality impact assessment.

Educational attainment:

- education qualifications gained/supported across all levels of staff
- student/trainee exam results
- trends in attrition
- time taken for learning to be used in practice
- contribution to attainment of corporate goals.

Levels of educational and learning activity:

- number of education sessions provided
- sufficient numbers of trainers, mentors, assessors and educational supervisors
- job descriptions identifying education and learning support in the workplace as a requirement for all staff
- numbers of identifiable posts in all services with time and responsibility for education and learning
- current number of clinical/workplace placements being supported
- hours of input contracted to provide education by workforce group and grade, for example consultant, ward manager

- preceptorship numbers and utilisation
- take up of the virtual learning environment and completion rate of standard programmes
- attrition rate of actual levels of activity against planned schedule
- numbers of consultants and GPs actively engaged in Deanery activity, for example recruitment.

Learner satisfaction:

- regular student and trainee focus groups with feedback to student body (focus group membership to alter during course of the year, with sample size to be statistically significant)
- student/trainee evaluation of learning scores
- retention of students and trainees after completion of training
- evaluation of pastoral care support.

Learning infrastructure:

- education development levels of educators and trainers, reflecting standard of all educators having required education competencies
- availability of educator resource to support delivery of education and planned learning activity
- investment level to support development of learning infrastructure
- library services accreditation level from North West Health Care Libraries Unit
- availability of library and electronic learning services, including access to the internet for all staff
- all work environments support learning activities.

Workforce:

- reduced sickness and absence
- reduced errors in the workplace
- number of applicants per job vacancy increases due to becoming a preferred employer
- career progression pathways improve
- quality assurance assessments improve.

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إذا أردت هذه الوثيقة بلغة أخرى او بطريقة أخرى، او إذا كنت بحاجة إلى خدمات مترجم، فنرجو أن نقوم بالاتصال بنا.	Arabic
যদি আপনি এই ডকুমেন্ট অন্য ভাষায় বা ফরমেটে চান অথবা যদি আপনার একজন ইন্টারপ্রেটারের প্রয়োজন হয়, তাহলে দয়া করে আমাদের সাথে যোগাযোগ করুন।	Bengali
本文件可以翻譯為另一語文版本，或製作成另一格式，如有此需要，或需要傳譯員的協助，請與我們聯絡。	Cantonese
Pokud byste si chtěli tento dokument přečíst v jiném jazyce nebo formátu, nebo pokud požadujete služby tlumočníka, kontaktujte nás.	Czech
اگر این مدرک را به زبانی دیگر یا در فورمتی دیگر میخواهید و یا اگر احتیاج به سرویس مترجم دارید، لطفا با ما تماس بگیرید	Farsi
Si vous souhaitez obtenir ce document dans une autre langue ou sous un autre format ou si vous avez besoin des services d'un interprète, veuillez nous contacter.	French
જો તમને આ દસ્તાવેજ બીજી ભાષા અથવા રચનામાં જોઈતો હોય, અથવા જો તમને ઇન્ટરપ્રિટરની સેવાઓ જોઈતી હોય તો, કૃપા કરી અમારો સંપર્ક સાધો.	Gujurati
ئەگەر دەتەوێ ئەم بەلگەیەت بە زمانیکی کە یا بە فۆرمیکی کە ھەبێ. یا پێویستت بە موتەرجیم ھەیە، تکایە پەیوەندیمان پیوە بکە	Kurdish
Jeżeli chcieliby Państwo otrzymać ten dokument w innym języku lub w innym formacie albo jeżeli potrzebna jest pomoc tłumacza, to prosimy o kontakt z nami.	Polish
ਜੇ ਇਹ ਦਸਤਾਵੇਜ਼ ਤੁਹਾਨੂੰ ਕਿਸੇ ਹੋਰ ਭਾਸ਼ਾ ਵਿਚ ਜਾਂ ਕਿਸੇ ਹੋਰ ਰੂਪ ਵਿਚ ਚਾਹੀਦਾ ਹੈ, ਜਾਂ ਜੇ ਤੁਹਾਨੂੰ ਗੱਲਬਾਤ ਸਮਝਾਉਣ ਲਈ ਕਿਸੇ ਇੰਟਰਪ੍ਰੈਟਰ ਦੀ ਲੋੜ ਹੈ, ਤਾਂ ਤੁਸੀਂ ਸਾਨੂੰ ਦੱਸੋ।	Punjabi
Haddii aad ku rabtid dokumentigaan luqado kale ama daabacaad kale, ama haddii aad u baahan tahay turjibaan, fadlan nala soo xiriir.	Somali
Kama unataka hati hii katika lugha nyingine au katika mtindo mwingine, au kama unahitaji huduma za mkalimani, tafadhali wasiliana nasi.	Swahili
இந்த ஆவணம் வேறொரு மொழியிலோ அல்லது வேறு வடிவத்திலோ தேவை என்று நீங்கள் விரும்பினால், அல்லது உங்களுக்கு மொழிபெயர்ப்பாளரின் தேவை இருந்தால், தயவு செய்து எம்மைத் தொடர்பு கொள்ளவும்.	Tamil
ነዚ ሰነድ እዚ ብካልእ ቋንቋ ወይ ቅርጺ እንተደሊኹም ወይ ድማ አስተርጓሚ እንተደሊኹም በጃኹም ተወከሱና ወይ ደውሉልና::	Tigrinya
یہ دستاویز اگر آپ کو کسی دیگر زبان یا دیگر شکل میں درکار ہو، یا اگر آپ کو ترجمان کی خدمات چاہئیں تو برائے مہربانی ہم سے رابطہ کیجیے۔	Urdu

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