Wessex Deanery Confirm and Challenge Meetings
Guidance Document (October 2011)

This document supplements the Wessex Deanery policy document ‘Review of Training Posts incorporating Quality Grading and Confirm and Challenge Meetings’ and is intended to provide additional information and guidance for those attending Deanery Confirm and Challenge meetings.

Aim

The aim of the Wessex Deanery Confirm and Challenge meeting is to agree with each School validated quality gradings for their posts (by specialty and Trust) and to refine any actions required. This will in turn produce a visual summary of the quality of medical education within Wessex overall.

By producing a quality grading for each post, the Deanery will be in a position to help co-ordinate and focus educational support from the level of departmental lead educator through to Director of Medical Education in Trusts; to Head of Schools and Programme Directors and ultimately the Postgraduate Dean and SHA.

This grading will provide a common language and immediate overview of postgraduate medical education within Wessex and will facilitate appropriate focus and escalation on areas of concern as well as highlighting examples of good practice for dissemination both of which will be reported to the regulator (GMC) as required.

Process

After a review of all Deanery held quality intelligence, a provisional grading will be drafted for each post. Gradings will be determined by the number and type of issues that may pertain to that post. The key tool used for this exercise is the Deanery Issues and Actions log which holds information from multiple sources including School and Trust reports, GMC Survey and visit reports. The Issues and Actions log is held and co-ordinated by the Deanery Quality Management team on behalf of all educators within Wessex; however the information is owned and submitted by educators. Each School should have a process for the cascade of feedback from departmental leads for education, to Programme Directors to Heads of School. For some schools this cascade works well. In other schools, particular the larger ones, organisation is required to ensure involvement and ownership by each departmental lead for education. This increases the reliance on the Head of School observations and experience.

All provisional gradings will be circulated to each Head of School prior to their Confirm and Challenge meeting to allow each School to review and prepare for this meeting with their Programme Directors and other relevant colleagues. This document will also be accompanied by an Issues and Actions log (by specialty) which will detail which issue levels have been considered.

The Confirm and Challenge meeting will be used to review all provisional grades, with particular focus on those posts provisionally graded C or D, and to invite discussion over any areas of potential disagreement. The aim is to come to an agreement on final post gradings that will be in place for 12 months.

Further details about the meeting can be found under the ‘Agenda’ section in this document.
Outcome

The outcome of each Confirm and Challenge meeting will be a summary of post gradings for each post (by specialty and Trust) for each School which will feed into a master summary list. This summary will be presented to the Postgraduate Dean and Quality Management Steering Group in November and be circulated to Schools and Trusts as appropriate. It will be available on request to the GMC and the SHA and will be used to update the Deanery quality records.

D grade posts require a confirmed action plan to be submitted to the Deanery within two weeks of this Confirm and Challenge meeting with a review of progress at three months (February) by the Chair of the Confirm and Challenge meeting and Head of School. For C grade posts a review of progress will be required after six months (May).

All D grade posts will be reported to the GMC in the Deanery’s report as they represent those posts at risk of removal. This Deanery report is due for submission in January 2012 and must include a full action plan for each issue identified for these posts.

All A* graded posts will also be reported to the GMC as demonstration of excellent training posts.

If agreement cannot be reached on a post grade at this meeting, each School has the option to appeal the grading awarded to them. In this instance the Deanery Quality and Workforce Manager should be contacted.
**Meeting Composition and Roles and Responsibilities**

All attending a Confirm and Challenge meeting have a responsibility to review the meeting paperwork prior to the day. This paperwork will include:

- Summary of provisional School post gradings (by specialty and Trust)
- Deanery Issues and Actions log, by specialty, showing which Issue Level has been used to calculate provisional gradings
- Annual Head of School report
- An outlier summary from the GMC Trainee Survey will also be circulated for information

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility at the Confirm and Challenge meeting</th>
</tr>
</thead>
</table>
| Chair                                          | Chair the meeting - including welcome and objectives of the meeting  
Co-ordinate discussions around any evidence brought to the meeting by the Head of School  
Listen to discussion and decide final grading  
Summarise actions agreed at the meeting  
Outline any appeal options |
| Quality and Workforce Manager                  | Provisionally grade all posts prior to the meeting  
Present proposed draft gradings at the meeting  
Contribute to the discussion  
Record any appropriate comments and action points at the meeting  
Ensure appropriate sign off of meeting paperwork  
Produce a summary for each School of their gradings  
Organise any appeals |
| Lay Advisor                                    | Ensure an equitable process  
Scrutinise the process from a patient/lay viewpoint  
Contribute to the discussion |
| Head of School                                 | Come to this meeting prepared to Confirm or Challenge provisional gradings  
Present a brief summary of Schools approach to visits, quality, information cascade and response to most recent GMC survey results  
Robust evidence will need to be referenced if used to challenge a grading *(Please note actual documentation may not be needed on the day).* |
| Programme Director – optional, by invitation of Head of School | Provide knowledge and information on individual specialties to inform final gradings  
Support Head of School in challenging any grading and the presentation of evidence |
| Programme Manager                              | Support Head of School in challenging any grading and the presentation of evidence  
If required provide an overview of posts and trainees |
| School Trainee Representative – optional, by invitation of Head of School | To provide a trainee viewpoint  
Scrutinise the process from an objective viewpoint  
Contribute to the discussion |
Agenda

Housekeeping

<table>
<thead>
<tr>
<th>Morning meeting timings</th>
<th>9.30am – 12.30pm</th>
</tr>
</thead>
<tbody>
<tr>
<td>(unless otherwise advised)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9.30 – 10.00 Deanery panel pre-meeting with Chair, Quality and Workforce Manager and Lay Advisor.</td>
</tr>
<tr>
<td></td>
<td>10.00 Head of School and colleagues to join the meeting</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Afternoon meeting timings (unless otherwise advised)</th>
<th>1.30pm – 4.30pm</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1.30 – 2.00pm Deanery panel pre-meeting with Chair, Quality and Workforce Manager and Lay Advisor.</td>
</tr>
<tr>
<td></td>
<td>2.00pm Head of School and colleagues to join the meeting</td>
</tr>
</tbody>
</table>

Location

Southern House, Otterbourne

Date

All meetings will take place between 7-18 November 2011. Each Head of School has been informed of their individual School date

Standard Agenda Items

1. **Panel pre-meeting**
   Discuss provisional grading and evidence

2. **Welcome and Objectives of the meeting by the Chair**

3. **Schools invited to provide a brief summary of:**
   Schools visits over the last year
   Schools Quality processes (including Head of School report and information cascade process)
   GMC Survey Results

   Panel discussion and any actions required recorded

4. **Presentation of proposed draft gradings by the Deanery**
   Including the evidence used

5. **Open discussion (by specialty) on proposed draft grades**
   If Head of School disagrees with any grading they need to demonstrate, with evidence, reasons for this challenge to the panel
   If panel agree with this Challenge this needs to be clearly documented on meeting paperwork
   If panel disagrees with this Challenge this needs to be clearly documented on meeting paperwork and appeal options outlined by the Chair to the Head of School

6. **For C and D grades – an action plan needs to be drafted and submitted within 2 weeks**
   Summary of action plans required

7. **Gradings sign off**
   Chair, Head of School and Lay Advisor sign off gradings for 12 months
   Any post gradings that are to be appealed to be clearly identified
Detailed Quality Post Gradings and Confirm and Challenge Meetings Process

Annual School Report Request sent to Heads of School (HOS) to complete in conjunction with their Programme Directors (PD)

School submit Annual School report, including update on all known issues for School and identification of any new issues

School reports analysed and Issues and Actions log updated

Provisional grades assigned for each post (by specialty and Trust) based on all quality intelligence held

Provisional grades circulated to HOS in advance of meeting
HOS and Panel to review provisional gradings in advance of meeting

Confirm and Challenge Meeting held

Deanery panel pre meeting
Discuss provisional grading and evidence

Panel discuss post gradings with HOS, including evidence used and actions agreed
HOS asked to sign off post gradings

If HOS agrees
Chair, HOS, Lay Advisor sign documentation
Gradings in place for 12 months

If HOS disagrees
HOS needs to demonstrate, with evidence, reasons for challenge to panel

If panel agree to challenge
This is clearly stated on documentation
Chair, HOS, Lay Advisor sign documentation
Gradings in place for 12 months

If panel disagree to challenge
Original grading awarded
This is clearly stated on documentation
Option of appeal explained to HOS

Summary of School gradings produced
Circulated to Schools and Trusts as appropriate
Action plans to be submitted
D/A* post details included in GMC report

Appeal held