Project Proposal Document

**Title/Name:** HEE South Region Student Nurse Practice Assessment Document (PAD) Project

**Description:** To agree on and implement a standard practice assessment document for student nurses (across all 4 fields of nursing).

**Project Manager- Organisation - Contact Details:** Karen Sheehy, Oxford Brookes University/HEE TV

**HEE SRO:** Zoe Scullard

**Project Geography:**
- All HEE South
- South West
- Thames Valley
- Wessex
- STP/LWAB area - Please Specify:
- CEPNs area - Please Specify:

**2018-19 HEE Mandate (multiple choice):**
- Deliver workforce to Improve out of hospital care
- Create the safest, highest quality health & care services
- Deliver Value for Money
- Prevent ill health & support people to live healthier lives
- Build the workforce for the future
- Improve services through the use of digital technology, information and transparency

**HEE Priorities/Reforms:**
- Nursing Reform

**HEE Finance Themes:**
- Supporting patient safety and person centred care

**HEE STAR:**
- Leadership
- Supply
- Up-skilling
- New Roles
- New Ways of Working

**Total amount requested:** £150K

**Funding year:** 2017-18

**Project start date:** 01/04/2018

**Project end date:** 31/01/2020

**Date submitted:** 08/06/2018

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**Section 1: Background and scope – please briefly outline background and scope of this project. Why HEE needs to fund this project?**

At present each university in the HEE south region has their own student nurse Practice Assessment Document (PAD). Some universities have more than 1 PAD as curricula are revalidated every 5 years and new PADs written to reflect changes in curricula; thus, students from the same university may be using different PADs. Many trusts and private, voluntary, and independent (PVI) organisations provide placements for student nurses from more than 1 university. Therefore, practice supervisors and assessors and other practice staff supporting student nurses in practice may be presented with a variety of PADs, each with its own unique style and each requiring the assessor to navigate and interpret academic language and requirements. With the shift from commissioned courses to pre-registration
nursing programmes supported through the Student Loans Company, universities are now free to negotiate placements with many more practice partners. To reduce the administrative burden and time spent interpreting PADs the introduction of a standard PAD is proposed.

To facilitate freedom of movement of students and support those supervising and assessing students in practice placements, the design and implementation of a common assessment tool would facilitate the achievement of this objective and co-ordinate practice assessment and student experience more coherently. Anecdotal comments from practice (often gathered at audit or mentor updates) suggest that they are happy to accommodate a variety of students from different HEIs but that they would find it easier if documentation was more co-ordinated, populated with the same features. It must be remembered that the south region is educating nurses for local placement providers as well as nationally and therefore a PAD that is used across the South and across the most of England as a recognised assessment document would be the ultimate aim of this project. Below is an example of the successful implementation of a standard PAD across London. This project would aim to adopt the London PAD across the South region.

Example:
With the support of London Strategic Health Authorities, Pan London successfully validated a unified document for pre-registration nursing in 2013. This new Practice Assessment Document (PAD) was introduced by all the 9 universities that have London commissions in 2014. This document is being used by students from all four fields of nursing and for all programmes leading to registration. This document has been implemented for 4 years. It was comprehensively evaluated in 2015 and the document development and evaluation has been widely disseminated at national and international conferences. The PAD was updated in September 2016 to reflect the amendments agreed by the Pan London Practice Learning Group following feedback from all HEI’s representing students, practice staff and lecturers.

Overall Summary of the PAD
• There is a PAD for each field of nursing
• Each document is known as ‘Parts’ to reflect the NMC progression points – for e.g. in the BSc nursing programme Part 1 will be equivalent to Year 1.
• There are 3 main components to the assessment 1) Professional Values (each placement) 2) Essential Skills (by the end of the Parts) and 3) An Episode of Care (once per part) that require the student to demonstrate their progression in the NMC’s four competency domains when providing care to a service user or group of service users.
• An initial, mid-point and final assessment must be completed for all students.
• Service user feedback is to be sought (via the mentor) – where relevant.
• Mentor/co-mentor/supervisor signatures to be included and mentors need to indicate date of last mentor update.
• Some universities grading practice therefore there is an addendum to the documents for those that do.

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All students have an Ongoing Achievement Record (OAR), i.e. one document for the whole programme in which each mentor documents their final comments.

### Section 2: Project goal – What is the overall purpose? What will this project deliver?

To use the PAN London PAD 2.0 for student nurses and results of a literature review on which to base the implementation of a south region PAD.

**Phase 1: Joining**

**PAD Project Team:**
- Appoint a PAD Project Team which refers to identifying the Project SRO and Project Manager/s and Co- Project Manager and Administrator of the Delivery Organisations (OBU).
- Review expressions of interest for including three selected HEIs to ensure a collaborative PAD Project Team membership.
- Identify administration and audit reporting and trail of HEE Funding to ensure liability of the used of funds and adherence to project guidelines
- Set up project meetings and establish reporting channels, timelines etc
- Set up Financial reporting agreement

**PAD Steering Group:**
- Identification of the “PAD Steering Group” refers to HEE South Regional Stakeholders who will be organised and convened by the Project Team in collaboration with HEE South
  - Establish face to face meeting
  - Establish administration and communication plan

**Phase 2: Preparing**
- Establish Project status reporting and meetings with HEE project team
- Produce an implementation strategy to cover all local South Geographies
- Gain necessary stakeholder/HEE approvals (Governance/research /ethics)
- Establish a working group timetable of activities, Gantt chart milestones etc
- Administration of logistics and resources for the project life

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Phase 3: Starting
● Literature review (request PAN London’s and update)
● Establish a local implementation strategy and data collection
● Prepare South Region PAD and handbook ready for review
● Reliable Preparation of academic staff, students, and mentors

Phase 4: Testing
● Revise risk / issues list
● Ensure Quality Assurance Plan deliverables are transparent and regularly reported

Phase 5: Implementing and sign off
● PAD fully agreed and in the process of implementation
● PDSA to ensure version control management
● Final South Region PAD and PAD handbook agreed by all identified parties

Gain South Region PAD approval from NMC and individual HEI validation committees

Phase 6: Showcasing
● Reliable implementation has been achieved
● Communication of success shared

Phases 7 – 10 will begin within the duration of the project, but might not be completed by the end of it.

Phase 7: Disseminating
Internal HEE
Internal HEI
Conferences
Writing up publications
Article for professional journal

Phase 8: Replicating
Evidence that continued reduction in variation is being achieved and maintained
Evidence of spreading

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Phase 9: Transforming
Evidence PAD introduced across the HEE South region and evidence of positive impact
Evidence gathering of levels of return on investment

Phase 10: Sustaining:
Evaluate the implementation of the South Region PAD and provide Formal feedback to HEE South Regional Stakeholders

Relevance: Quality improvement projects will have impacted positively on patients, carers, professionals, or organisations to contribute towards patient and workforce experience, safety, innovation and/or research

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Section 3: Project Plan – please list the milestones you plan to achieve in the shorter, medium and longer period with timescales and anticipated costs. Please clearly indicate the reporting quarter and end date for each milestone. Please also note that Evaluation, Dissemination and Sustainability are mandatory activities (for more details please complete section 6).

<table>
<thead>
<tr>
<th>Milestones</th>
<th>Start Date:</th>
<th>End Date:</th>
<th>Reporting Quarter</th>
<th>Anticipated cost (£):</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Appointment of PAD project SRO</td>
<td>01/04/2018</td>
<td>15/06/2018</td>
<td>Q2 - 2018-19</td>
<td>77,630</td>
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<tr>
<td>Project team inc administration</td>
<td></td>
<td></td>
<td></td>
<td>70,021</td>
</tr>
<tr>
<td>2. First Project team meeting</td>
<td>06/2018</td>
<td>08/2018</td>
<td>Q2</td>
<td></td>
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<tr>
<td>3. Scoping of PADs across the UK (inc literature review) and summary of</td>
<td>05/18</td>
<td>08/18</td>
<td>Q3-Q4</td>
<td></td>
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<td>evaluation and where progress is with NMC standards</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>4. Identification and ongoing inclusion of HEI and placement provider,</td>
<td>05/18</td>
<td>08/19</td>
<td>Q3-Q4</td>
<td></td>
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<tr>
<td>service users, students, stakeholders</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>5. Monthly project meetings</td>
<td>06/18</td>
<td>01/20</td>
<td>Q3</td>
<td></td>
</tr>
<tr>
<td>6. Draft PAD for review</td>
<td>09/18</td>
<td>10/18</td>
<td>Q1</td>
<td></td>
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<tr>
<td>7. Final PAD and PAD handbook agreed</td>
<td>01/19</td>
<td>02/19</td>
<td>Q2</td>
<td></td>
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<tr>
<td>8. Gain approval from NMC and individual HEI validation committees</td>
<td>01/19</td>
<td>01/20</td>
<td></td>
<td></td>
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<tr>
<td>9. Preparation of academic staff, students, and mentors</td>
<td>01/19</td>
<td>01/20</td>
<td></td>
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<td>10. Project Evaluation</td>
<td>31/01/2020</td>
<td>29/02/2020</td>
<td></td>
<td>Select reporting period</td>
</tr>
<tr>
<td>11. Project Dissemination</td>
<td>31/01/2020</td>
<td>29/02/2020</td>
<td></td>
<td>Select reporting period</td>
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<tr>
<td>12. Project Sustainability (i.e. BAU)</td>
<td>31/01/2020</td>
<td>31/03/2020</td>
<td></td>
<td>Select reporting period</td>
</tr>
</tbody>
</table>

**Total amount requested:** 150,000

Section 4: Benefits realisation – what are the anticipated measurable Benefits? Please outline what measures you will use to monitor and assess what improvements have been made to the service? (Please add additional rows if needed) - Please

<table>
<thead>
<tr>
<th>Benefit Description</th>
<th>Measure Description</th>
<th>Monitoring Methodology</th>
<th>Baseline</th>
<th>Projected Outcome</th>
</tr>
</thead>
</table>

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1. Phases 1-9 complete successfully
   Each phase reported on quarterly when complete
   The PAD Project Manager will report activities related to this funding on a monthly (update) and quarterly (formal) basis to HEE Project Lead and PPMO using the quarterly reporting template developed by PPMO. There is an expectation that a similar quality reporting function will continue through any subsequent contractual relationship i.e. Recruited PAD Project Members

2. Mentors/supervisors levels of confidence and knowledge to complete the PAD
   Mentors/supervisors will be given opportunity to evaluate their level of understanding etc. through a questionnaire
   Questionnaire used for evaluation phase

3. PAD and practice assessment processes embedded into placement settings
   HEI and stakeholder questionnaire evaluation through questionnaire and observation of process by PAD Project Team
   Questionnaire used for evaluation phase
   HEE Project Leads and PAD Project Team shall meet on a frequency to be mutually agreed to review and report on quality and performance, challenges and any suggested improvements, variations, slippage, extensions or reductions and such other matters as considered necessary.

<table>
<thead>
<tr>
<th>Section 5: Risk plan – What are the anticipated Risks and how are they going to be mitigated? Please provide brief details of any serious risks to the success of the project and how these will be mitigated.</th>
</tr>
</thead>
</table>
| **Risks and Challenges:**
  | **Severity** | **Likelihood** | **Mitigating action:** |
| Capacity of the project manager and project team to undertake the work. | Very High | Low | MoU has no progress governance included. Redirect funding if project manager and project team no progress in 6 months |
| Not all HEI’s want to participate/agree to a common practice assessment document and do not engage | Very High | Medium | Who has a vested interest or is directly affected by delivery of the project, it could |

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Unable to secure agreement with London PAD re copyright in timeline | High | Low | Need to extend timeline

NMC approval events for HEI’s around new standards happening at same time therefore urgency to get this project done | High | High | Prioritise HEI’s who are in first approval stage with NMC

Electronic platforms vary across the South therefore will London agree the PAD can be adapted to these platforms in time frame | High | High | Need to discuss early with London re implications and have plan for how version control will be maintained post project.

Unable to evaluate project in depth in timeline as implementation of the PAD’s will vary across HEI’s and gain ethics approval for patient engagement and involvement | | | Consider additional funding request for 19/20 to establish research project separate from PAD delivery.

**Section 6: Evaluation, Dissemination and Sustainability – please briefly outline how you plan to evaluate the project, share the learning and ensure the outcomes will be sustainable in the future (i.e. BAU)**

The project will be evaluation using questionnaires and focus groups as well as written evidence from committee meetings for findings related to:

- A PAD that is user friendly, i.e. easy to navigate and complete by those responsible for the support and assessment of student nurses in practice
- A PAD that will support the student nurses to learn and demonstrate learning and progression
- A PAD that will support the safe utilisation of placement capacity
- Closer partnerships across the region can be forged and relationships developed with individuals who have a strong commitment towards the education of students in clinical practice.
- This integrated way of working will lead to an increase in diverse learning opportunities.

It is anticipated that the process, the findings and the recommendations will be disseminated via publication in professional journals and conference presentations.
<table>
<thead>
<tr>
<th><strong>Author:</strong></th>
<th>Karen Sheehy</th>
<th><strong>Date:</strong></th>
<th>08/06/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approved by (HEE Lead):</strong></td>
<td>Zoe Scullard</td>
<td><strong>Date:</strong></td>
<td>Select date</td>
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<tr>
<td><strong>Approved by Senior Finance Business Partner:</strong></td>
<td></td>
<td><strong>Date:</strong></td>
<td>Select date</td>
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