WORKBOOK TO ASSIST MENTORS IN ACHIEVING TRIENNIAL REVIEW
Dear Mentor

This workbook has been designed to help in achieving your Triennial Review, as part of the Standards to Support Learning & Assessment in Practice (NMC 2008).

By completing each Domain worksheet this will count as evidence towards your triennial review.

This workbook is intended for:

WHO – All Nursing and Midwifery mentors who support learners in a practice setting.

HOW - Each mentor undertakes a process of self-evaluation and review with regard to their role as a mentor.

WHY – In addition to PREP requirements, mentors are now required by the NMC to review their mentorship skills and performance every three years.

WHERE – Each employing Trust is responsible for providing a reporting framework for you to use to collate your evidence.

WHEN – Mentors who obtained their mentorship qualification on or before 1st September 2007, should complete their first triennial review by September 2010. This should then become part of an ongoing process, which will likely become aligned to the PDP annual appraisal and the Electronic Staff Record (ESR).

Please consider the following factors as a guide to completing your Triennial Review:

1. Consider your experience as a mentor, how you have developed & how you have influenced the development of your students.

2. Make a start – it will get easier as you gain more evidence.

3. It is an ongoing process – collect your evidence whilst you are mentoring students.

4. Think about what you already do as a mentor & how you can evidence this.

5. Think about how evidence can be used/demonstrated across more than 1 of the 8 domains.

6. Utilise the examples given in this document.

7. Share ideas regarding evidence with colleagues and other mentors.

8. Ask for feedback from students/colleagues on your role as a mentor.

9. Use all the resources available to you. Seek help and support if you need it.

10. Ensure that your self-verification (signed off by your manager) is sent to the appropriate individual within your Trust, so that information can be updated on the mentor register.
NMC DOMAIN 1 - Establish Effective Working Relationships

Demonstrate effective relationship building skills sufficient to support learning, as part of the wider interprofessional team, for a range of students in both practice and academic learning environments.

- Demonstrate an understanding of factors that influence how students integrate into practice settings.
- Provide ongoing and constructive support to facilitate transition from one learning environment to another.
- Have effective professional and interprofessional working relationships to support learning for the entry to register.

First impressions are very important and can help or hinder the mentoring relationship.

- How are students welcomed and introduced to your practice setting?

**Reflect on these issues.**

NMC DOMAIN 2 – Facilitation of Learning

Facilitate learning for a range of students, within a particular area of practice where appropriate, encouraging self-management of learning opportunities and providing support to maximize individual potential.

- Use knowledge of the student’s stage of learning to select appropriate learning opportunities to meet individual needs.
- Facilitate a selection of appropriate learning strategies to integrate learning from practice and academic experiences.
- Support students in critically reflecting upon their learning experiences in order to enhance future learning.

- When and how do you identify the learning needs of your individual students?

- Identify the strategies you use to assist students to learn during their placement. How do you know if the strategies are effective?

- How do you know that students have benefited from the learning experiences that you have facilitated? Have you changed the way you facilitate learning and why?

**Reflect on these issues.**
NMC DOMAIN 3 Assessments and Accountability

Assess learning in order to make judgments related to the NMC Standards of Proficiency for entry to the register or for recording a qualification at a level above initial registration.

- Foster professional growth, personal development and accountability through support of students in practice
- Demonstrate a breadth of understanding of assessment strategies and ability to contribute to the total assessment process as part of the teaching team
- Provide ongoing and constructive support to facilitate transition from one learning environment to another
- Provide constructive feedback to students and assist them in identifying future learning needs and actions, manage failing students so that they may enhance their performance and capabilities for safe and effective practice or be able to understand their failure and the implications of this for their future
- Be accountable for confirming that students have met or not met the NMC competencies in practice
- As a sign-off mentor confirm that students have met or not met the NMC standards of proficiency and are capable of safe and effective practice

Assessment - Giving regular feedback is also very important, and is an essential component of a continual assessment programme. (RCN 2002)

- When do you give feedback to the students you are mentoring?

- List the different methods of assessment that you use when assessing learners, and consider and write down the main advantages and disadvantages for each method.

- Why do student nurses/midwives need to be assessed in practice?

- What approaches do you use to assess students’ skills, knowledge and behaviour?

- Describe what action you would take if a student was giving cause for concern?
Who can and cannot make a summative assessment of a student’s performance?

Reflect on these issues.
NMC DOMAIN 4 – Evaluation of Learning

Determine strategies for evaluating learning in practice and academic settings to ensure that the NMC standards of proficiency for registration or recording a qualification at a level above registration have been met.

- Contribute to evaluation of student learning and assessment experiences, proposing aspects for change resulting from such evaluation
- Participate in self and peer evaluation to facilitate personal development and contribute to the development of others

How do you provide constructive feedback to your students?

What mechanisms do you use to seek feedback from your students to assure yourself that you are facilitating effective learning?

When should you conduct the Final Interview with students? What should the meeting include?

Reflect on these issues
NMC DOMAIN 5- Creating an Environment for Learning
Create an environment for learning, where practice is valued and developed, that provides appropriate professional and inter-professional learning opportunities and support for learning to maximize achievement for individuals

- Support students to identify both learning and experiences that are appropriate to their level of learning
- Use a range of learning experiences, involving patients, clients, carers and the professional team, to meet defined learning needs
- Identify aspects of the learning environment which could be enhanced negotiating with others to make appropriate changes
- Act as a resource to facilitate personal and professional development of others

Learning environments are complex. Consider the physical, emotional, social and cultural aspects of the learning environment within which you work and your students learn.

_identify the range of learning opportunities available to students and how you might plan a programme of learning to encompass these opportunities. Include learning alongside other health and social care professionals._

_is there anything that can be changed/developed to enhance the range/quality of learning opportunities available?_

_what are your strengths as a mentor? How do they contribute to the development of your students?_

_reflect on these issues._
NMC DOMAIN 6 – Context of Practice

Support learning within a context of practice that reflects health care and educational policies, managing change to ensure that particular professional needs are met within a learning environment that may also support practice development.

- Contribute to the development of an environment in which effective practice is fostered, implemented, evaluated and disseminated
- Set and maintain professional boundaries that are sufficiently flexible for providing inter-professional care
- Initiate and respond to practice developments to ensure safe and effective care is achieved and an effective learning environment is maintained

The context of practice is determined by your attitudes, beliefs and attributes, also the environment within which you practice- the organisational values, resources and understanding of practice.

Identify how you maintain and develop your knowledge and skills. Do you have specialist knowledge and skills and how are they maintained?

How do you contribute to the development of the practice environment within which you work? Do you have any additional responsibilities e.g. link role, audit role or member of practice forum?

How do you work effectively with other professionals within your practice environment?

Reflect on these issues.
NMC DOMAIN 7 – Evidence Based Practice

Apply evidence-based practice to their own work and contribute to the further development of such a knowledge and practice evidence base

- Identify and apply research and evidence-based practice to their area of practice
- Contribute to strategies to increase or review the evidence base used to support practice
- Support students in applying an evidence base to their own practice

Evidence-based practice is about practitioners utilising the best available evidence from research and implementing it in practice.

✍ How do you keep up to date with the latest research/evidence about best practice? Consider how you access books, journals, professional websites, training and new guidelines and protocols.

✍ What role do you play in enhancing your professional evidence base? Consider your role in audit, research, guideline/protocol development, contribution to specialist forums/networks etc.

✍ As a mentor how do you support students with applying the evidence base to their practice?

✍ Reflect on these issues.
NMC DOMAIN 8 – Leadership
Demonstrate leadership skills for education within practice and academic settings

- Plan a series of learning experiences that will meet students’ defined learning needs
- Be an advocate for students to support them accessing learning opportunities that meet their individual needs, involving a range of other professionals, patients, clients and carers
- Prioritise work to accommodate support of students within their practice roles
- Provide feedback about the effectiveness of learning and assessment in practice

Mentoring is a key part of leadership. You are an advocate, a role model, an expert, a guide, a resource, as well as a standard setter, assessor and gate keeper to the profession.

Identify how you have planned and delivered informal or formal teaching for students. This could also include teaching resources used by other learners within your area of practice.

Identify how you ensure that students’ learning needs are met within the context of meeting the demands of your patients/clients and the service within which you work.

Identify how you ensure that students’ supernumerary status is protected and what action you would take if you or your student felt that they were not supernumerary?

Reflect on these issues.
How effective is the learning provided in your area/team?
Portfolio – Examples of Evidence to Support Triennial Review

The NMC Standards to Support Learning and Assessment in Practice (SLAIP) (2008) can be looked upon as an extension of our current PREP requirements, except the area being examined is our mentoring competencies instead of our own Continuous Professional Development.

It is up to the individual mentor how they decide to collate this evidence, but it is advised, just like PREP, that mentors start to gather evidence in a portfolio separated by eight inserts, i.e.: 1 insert per NMC Domain.

Listed below are some suggested tools, documents or activities that you could use. The list is not exclusive and you are encouraged to include a wide variety of evidence.

**PLEASE NOTE THAT ANY EXAMPLES OF STUDENT DOCUMENTATION MUST HAVE STUDENT CONSENT AND BE ANONYMISED**

For example:

- Mentorship Module Workbooks or course work
- Lesson plans of formal clinical teaching (pre-planned)
- Process maps for spontaneous clinical teaching
- Self evaluation of your teaching
- Development of learning opportunities within your practice area
- Clinical learning environment assessment
- Student placement timetables
- Student Welcome Packs you might have developed
- Resource development – student packs, CD ROMs
- Reflections on link nurse roles
- Testimonials from students (must show evidence of consent)
- Student evaluation of the placement experience
- Evidence of involvement in working parties / development groups
- Evidence of policy / protocol / procedure development
- Evidence and knowledge of your educational audit
- Your annual appraisal
- Your KSF review
- Accounts of how you have introduced new procedures/changes within practice
- Reflective accounts of your experience as a mentor – teaching, facilitating, learning etc
- Reflections on how you involved MDT in supporting your learners development
- Minutes form meetings (with written permission from the chairperson) – nurse education, diabetes, infection control etc.
- Student Practice documentation, in the form of Interim and end of placement reports/feedback
- Student Welcome Packs
- Feedback from CFP or Ward managers
- Understanding of mentors role within orientation
- Demonstrate understanding of accountability / NMC Standards
- Existing mentorship preparation portfolios from a recent course
- Reflective writing / Self Evaluation
- Communication with Link Lecturer /University Rep
- Evidence of attendance at annual mentor updates
- Evidence of teaching sessions. Written feedback from students
- Evidence of supporting student evaluation and actions taken as a result of student evaluation
- Demonstrate appropriate visits for the level of student to enhance learning
- Existing mentorship preparation portfolios from a recent course
- Reflective writing / Self Evaluation
• Student Mid and end of placement reports, Student practice documentation, Facilitation/Teaching Methods/plans
• Evidence of attendance at mentor update.
• Discussion of issues relating to student development.
• Reflective Writing taken from PREP portfolio on aspects of accountability
• Student practice documentation, written feedback, placement reports, copies of student outcomes and action plans
• Discussion around actions to take if student is under performing.
• Appraisal Documentation
• Existing mentorship preparation portfolios from a recent course
• Reflective writing / Self Evaluation
• Participation in educational audit
• Evidence of participation in PDR
• Copies of student’s action plans devised from end of placement feedback
• Existing mentorship preparation portfolios from a recent course
• Copies of reflective writing from students
• Mentor evaluation forms
• Teaching aids used for student.
• Learning contracts taken from student practice documentation
• Existing mentorship preparation portfolios from a recent course
• Educational Audit committee documentation containing your input i.e. action plan
• Appraisal of Line Manager-link with PDR
• Demonstrate being a positive role model.
• Evidence of networking, sharing knowledge, participation in clinical audit
• Feedback from other professionals/ CPFs
• Provide evidence for the aspect of interprofessional care through Mentor/supervisor witness testimony
• Appraisal documentation
• Produce Reflective writing on the topic of Evidence Based Practice
• Contribution to Policy/Procedural Practice documentation
• Knowledge of new guidelines/policy e.g. Trust, DOH, NICE, NSF
• Dissemination of knowledge from relevant modules/study days.
• Participation in Link Groups.
• Participation in audit, guideline development, journal groups. Student testimonial.
• produce Reflective writing on the topic of Evidence Based Practice,
• Student practice documentation
• Student Learning Contract
• Evidence of contribution to ward teaching programme
• Testimonials from CPF/ PEF/ HEI / Students
• Evidence of Protected time (Sign Off Mentors)
• Evidence of time management
• Examples of initial interviews
• Participation in Educational Audit Educational Link Group, mentor updates
• Thank you cards/letters from students
## TRIENNIAL REVIEW SECTION

<table>
<thead>
<tr>
<th>What period does this review cover?</th>
<th>From _ _ / _ _ / _ _ to _ _ / _ _ / _ _</th>
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**Where were you working throughout this period?**

*Include name of the organisation, department, job title and brief description of role.*

<table>
<thead>
<tr>
<th>Training and updates</th>
<th>Training</th>
<th>Date</th>
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<tr>
<td>Annual Mentor Update</td>
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# RECORD OF STUDENT ACTIVITY

## Mentoring Students

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<tr>
<th>Date</th>
<th>From</th>
<th>To</th>
<th>Student COHORT</th>
<th>Field of Practice</th>
<th>Level of Student</th>
<th>University</th>
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## RECORD OF FORMAL TEACHING STUDENTS

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<th>Date</th>
<th>Number of Students</th>
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## RECORD OF SIGN OFF MENTOR ACTIVITY

(Sign Off Mentors Only)

<table>
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<tr>
<th>Date</th>
<th>Student COHORT</th>
<th>Observed Practice or Independent</th>
<th>Protected time of 1 hour a week allocated please comment</th>
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# Reflective Mentoring Account

## What was the nature of the activity?
Briefly describe the activity; for example “I mentored a first year pre-registration student undertaking module 3 of their training throughout their placement”. Or “I attended an annual mentors' update session”.

## Description of the activity.
Give a more detailed description of what you did; for example “I helped the student develop their learning contract” or “I observed the student accurately perform drug calculations” etc.

## What was the outcome of the activity?
Give a personal account of how your involvement in this activity contributes to your personal practice and/or your continued professional development. Remember to link this to the requirements of your personal development review and to the requirements for triennial (3 yearly) NMC review.

## Date:

Signed :

Print Name :

(Please photocopy this page if more pages required)
On completing the attached framework in this the booklet, the mentor should confirm they have demonstrated achievement of the eight NMC domains and meet the competencies required by the Triennial Review of the NMC standards to support learning and assessment in practice.

<table>
<thead>
<tr>
<th>Triennial Review of Mentors and Practice Teachers</th>
<th>Mentor Initials</th>
<th>Managers Initials</th>
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<tbody>
<tr>
<td>I have evidence of mentoring at least 2 students with ‘due regard’* within the 3 year period included in my mentoring portfolio/booklet</td>
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<td>I have participated in annual mentor updates</td>
<td>Date…… Date…… Date……</td>
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<td>I have evidence in exploring as a group activity the validity and reliability of judgements when assessing practice in challenging circumstances. (usually included in your mentor update)</td>
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<td>I have evidence of mapping my ongoing development in my role against current NMC mentor standards (as set out in Standard to Support Learning and Assessment in Practice 2008)</td>
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<td>I have current working knowledge of current Universities programes.</td>
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<td>I have current working knowledge of current Universities programes.</td>
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<tr>
<td>I have completed a recognised mentor preparation programme. If not already presented please send a copy of the certificate to education department Pass Date (mm/yyyy).........................</td>
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**Sign Off Mentor**

Are you a sign off mentor identified in 2009 Yes □ No □

New sign off mentors: I have participated in 3 sign off sessions (2 of which may be simulated). One of these sessions was a supervised sign off of a final placement pre-registration student

Date….. Date….. Date…..

*See page 15 of the NMC Standards to support learning and assessment in practice (2008)*

**Mentor Statement:** I confirm that I have self-assessed and declare that I meet the NMC standards to support learning and assessment in practice (2008). YES / NO (please circle)

Mentors Name: _______________________________ (Please Print)

Department: _______________________________

Mentors Signature: __________________________ Date: ___/___/___

**Managers Statement:** I am recommending / not recommending (please delete, as appropriate) as a competent mentor and should remain on the live register. As line manager I will ensure that this competence is registered on to the local mentor register within 28 days

Managers Name: _______________________________ (Please Print)

Managers Signature: __________________________ Date: ___/___/___

*If the mentor has identified competencies which still require to be developed these should be identified in the Action Plan below and more fully discussed with the line manager at the verification meeting.*

**Mentors Action Plan – Please identify competencies which require further development**

<table>
<thead>
<tr>
<th>Action required</th>
<th>By Whom</th>
<th>By When</th>
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Please send a copy of this document, to MARIAN HUNT education centre JPUH.
<table>
<thead>
<tr>
<th>Resource</th>
<th>Can be accessed via or click on icon below</th>
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If you have any questions or queries regarding Triennial Review, please do not hesitate to contact your local Clinical Educator or Practice Education Facilitator:

**Key Contacts**

**Marian Hunt**: Clinical Educator, Education & Training Centre  
Telephone: 01493 453494  
Email: marian.hunt@ipaget.nhs.uk

**Paul Sewell**: Practice Education Facilitator (PEF)  
Norfolk and Suffolk Workforce Partnership  
Telephone: 07507645973  
Email: paul.sewell1@nhs.net