

Facilitating and running of training courses

New Appraiser



Hello everyone, welcome to this short guide where we will go over the sessions plan for the New Appraiser training courses run by NES.

All the necessary documentation is available for downloading on the "Tutors Access only" section on the Medical Appraisal Scotland website, where you are watching this recording from.

We will cover the facilitation and running of the courses, a few things to watch out for and share some lessons we have learnt from delivering this training.

Format (1/2)

- MS Teams
- Two half-days | AM or PM
- Modules completion
(<https://www.appraisal.nes.scot.nhs.uk/s/newapppremod/>)
- Refer to Session Plan
(<https://www.appraisal.nes.scot.nhs.uk/s/tutors/na/>)



Unless otherwise stated, all our training courses are run online and facilitated via Microsoft Teams. It's run over two half-days, either over two mornings or two afternoons; and for continuity and assessment purposes you are asked to tutor on **both** half-days. In other words, we can't really switch you around between morning and afternoon sessions.

As a point of reference, we would never ask you to tutor on both morning and afternoon sessions on the same dates – it's physically too tiring and we just won't ask that of you.

The participants are all new to the appraiser role, and they will have been asked to complete the online modules and you can access them from our website:

<https://www.appraisal.nes.scot.nhs.uk/s/newapppremod/>

The modules are in video format for easy viewing. For those who prefer to read them instead, a PDF version of the videos transcript is also provided.

What we will cover in this video can be found in the sessions plan, which you can download from the "Tutors only" section of our website:

<https://www.appraisal.nes.scot.nhs.uk/s/tutors/na/>

Format (2/2)

- Tutors = Tutors
- NES Medical Appraisal team = Admin
- Share experience | reassurance
- Assessment



The key thing to mention here is that in your role as tutors, your main responsibility is the tutoring. We will be covering quite a bit of admin material especially in the day 2 organising, but the NES team will be responsible for all admin tasks and we will also be on hand on the training days to run and provide the necessary IT support.

The main thing for you as tutors is to **share your experience**, and in some cases provide a bit of **reassurance**. Some participants will be enthusiastic and are there because they want to be; but some will have been asked to come to the training and they may have more reservations or questions. It might sound a bit daunting to try and change that negative mindset or focus, but from experience, they've tended to add more interest and value to the large group discussions.

At the end of the training all participants are assessed on their **readiness** to take on the appraiser role. We will cover more on this shortly, but in the meantime let's break down the two training days.

Day 1	AM	PM	Session
30 mins	08:30 13:00		Tutors meeting
00:15	09:00	13:30	Welcome and Introductions
00:30	09:15	13:45	Review of pre-course modules
00:45	09:45	14:15	Supporting information
00:10	10:30	15:00	BREAK
01:00	10:40	15:10	PDP and Form 4
00:10	11:40	16:10	BREAK
00:30	11:50	16:20	Appraiser skills
00:10	12:20	16:50	Plenary
	12:30	17:00	End of Day 1
00:15	12:30	17:00	Tutors meeting

	A	B	C
1	When	PM	When the training is taking place
2	Sessions	3	Number of mini appraisal sessions to be run
3			
4	Timing	Time	Day 1 Sessions
	00:30	13:00	Tutors Meeting
5	00:15	13:30	Welcome and Introductions
6	00:30	13:45	Review of pre-session information (Large group discussions)
7	00:45	14:15	Supporting Information (breakout)

This is the timetable for day 1. We have provided both morning and afternoon timings for you on screen, but if you download the actual session plan spreadsheet, you can change the morning and afternoon timing by selecting the cell B1 on the spreadsheet as indicated on screen, and the timetable will automatically update itself.

The half-day session will run for three and a half hours; and for yourselves as tutors it will be a little over four hours, as we start the day with an internal tutors meeting.

30 mins | 08:30 | 13:00 Tutors meeting

- NES Admin(s), Lead Tutor and Tutors
- All tutors to chip in throughout the day(s)
- Session plan / running order
- Tutors agree on who leads which session
- Take notes (for aiding assessment)
- Reconvene for 10-15 mins at end of day

There are two tutors meeting on each training day, one at the start and another at the end. For the first meeting we will meet 30 minutes before the start of the training. This will be attended by the NES admins, yourselves as tutors and the Lead tutor. The Lead Tutor will introduce the day, but the expectation is that all tutors will take turns in leading small and large group discussions and chip in where appropriate.

The key role for the Lead Tutor is to provide specific feedback to any participants who you – as a panel – assess as "not ready", but we will come back to that.

During this meeting we will go through the sessions plan and running order of the day. You will agree amongst yourselves on who will lead which plenary, which is very much akin to chairing short meetings; and please do take notes as needed throughout both days. Whilst a big part of the assessment focuses on the mini appraisals, you are observing their engagement and participations through **both** days, so if anything is said or if any behaviours or attitudes concerns you - make a note of it and raise it for discussion at the "end of day" tutors meeting.

15 mins | 09:00 | 13:30 | **Welcome and Introductions**

- NES Admin – housekeeping and Teams etiquette
- Lead Tutor introduces other tutors **first**
- Round robin
 - What they are most looking forward to; or
 - What do they want to get out of the training etc



When the training formally begins, the NES admin will kick things off by going over some housekeeping and Teams etiquette, before handing over to the Lead Tutor for the formal introductions.

It's advised that the tutors are introduced **first** before the participants are brought in, just so they know who you all are.

When it comes to the participants, consider asking what are they most looking forward to, or what they hope to get out of the training.

Just be mindful you only have 15 minutes for this section.

30 mins | 09:15 | 13:45 | Review of course modules

- Good ice breaker
- Opportunity for insight
- Resist the urge to cover everything raised
- “Told to be here” vs “Want to be here”
- Don’t force the conversation



After the intros, we start things off in a large group discussion, asking everyone what their thoughts are on the pre-course modules. This is a good ice breaker and a good way to get them talking. It’s an opportunity for insight into their understanding of the appraisal process and the role of appraiser, what they think of appraisal, and if or how the modules changed their viewpoints. We have heard many participants comment that they wished they had done the modules sooner as it gave them a better understanding of the processes, with many more stating that they will be better appraisees as a result of completing the modules.

Try not to let their enthusiasm derail your timing. There’s only 30 minutes for this session so resist the urge to cover everything they raise. Bear in mind, this is only the FIRST session of day 1! But if time is running away from you, reassure them that their queries will be discussed at later sessions.

Now, you may come across some participants who will have been “asked” to be an appraiser, as opposed to those who want to be an appraiser... don’t let that throw you off – it might be that they’ve had a bad experience or interaction with an appraiser. Regardless, it can sometimes enrich the discussions and add to the conversations when they share their experiences.

If the conversations come to a natural early ending, that’s ok, we can always start the next session a bit earlier and give you more time in the breakouts.

10 minutes screen break (stay!)

- Breakout groups (x2)
- How SI is appropriate / sufficient to cover all roles?
- What issues might they come across?
- How do they cover confidentiality?
- Everyone has a say
- Participants stay in same group
- Paired tutors swap

Next is the first of two breakout sessions, where we will split everyone into two groups to discuss “Supporting Information”. In the module and in their workbooks, participants will have been asked to consider how they ensure the supporting info is appropriate and sufficient to cover the **WHOLE** scope of the appraisee's practice; and also what issues might they come across. You could also ask how they intend to cover confidentiality and, if time allows, maybe invite them to have a go roleplaying that. They might be shy in the large group setting so when in the smaller breakout groups like this, make sure everyone has a say.

You have 45 minutes for this session and there will be two tutors with each group. The participants will stay in the same groups during day 1 and the tutor pairings will swap groups for the second breakout, so that you get to interact with everyone by the end of the day.

Then we will have a short 10-minute break. Please make sure you all stay in the breakout rooms and **DON'T** leave the meeting. The NES Admin will close the breakouts when the time is up and you will be returned to the main room automatically. Use the break to stretch your legs and move away from the screens, otherwise physically you will be quite cold and tired.

10 minutes screen break - STAY

- Breakout groups (x2) – Tutors swap
 - How to discuss PDP from last appraisal
 - How they link to CPD
 - How they use appraisal to develop PDP for year ahead
 - What is Form 4 for?
 - What does “good” Form 4 look like?
 - Mini Form 4 exercise
- <https://www.appraisal.nes.scot.nhs.uk/s/videos/f4exercise/>

We will close the breakouts midway through the 10-minute break and swap the tutors for the second breakout session, which is on Personal Development Plan and Form 4. You have an hour for this so you can split it 30 minutes each to discuss both topics.

For the PDP discussions, they will have reflected in their workbooks what a well-developed PDP looks like, how they might challenge an under-developed PDP, how they might discuss last year's PDP, and also how they might develop a new PDP through appraisal discussions.

For the Form 4 session, start by asking them what the purpose of a Form 4 is and what are the characteristics of a good Form 4.

As part of the module, they will have watched a mock appraisal video with which they were asked to draft a mini Form 4 on. You can also ask them to share their thoughts on this exercise and how they felt about writing the Form 4, perhaps they might have asked different questions if they were the appraiser for example. Even if you have experienced appraisees in your group, don't be surprised by any queries they raise as they will be new to the drafting of a Form 4.

After the hour, take the 10-minute screen break... again the NES Admin will bring everyone back midway through this break so just stay in the meeting.

30 mins | 11:50 | 16:20 | **Appraiser skills (video section)**

- Large group discussion
- NES Admin to play video
- <https://www.appraisal.nes.scot.nhs.uk/s/videonat/>
- Focus on **appraiser skills** – not scenario

The final session will be a large group discussion focusing on appraiser skills. The NES admin will play a short video at the start covering a particular scenario. We will invite the tutor leading this session to introduce this briefly, making sure the participants **focus on the appraiser skills demonstrated** instead of the roleplayed scenario. Ask them what skills did they witness, what the appraiser did well, what could they have done better, and what they might do differently.

30 minutes have been allocated for this session, including the showing of the video.

10 mins | 12:20 | 16:50 | Plenary

- Large group discussion
- Cover any topics not touched on thus far
- Focus on day 2 is mini appraisal **practice** sessions
- Participants to upload their PDPs
- **“Mini appraisal”** – avoid “roleplay”
- Appraiser skills module
- If attendance changed
 - “we will confirm day 2 groupings ASAP”

Then, for the final 10 minutes of the day it's a large group plenary, an opportunity for the participants to ask any burning questions they may have or anything not yet touched up.

Remind them the focus on day 2 is going to be on their mini appraisals and if they haven't done so already, they need to upload and share their PDP's. At this point the NES admin could share their screen, so the participants know exactly where to go to upload their materials.

Be mindful to refer to it as **“mini appraisal”** practice sessions and avoid using the term “roleplay”. This is to reinforce the need for them to treat the exercise seriously especially as participants have been asked to share their **real** PDPs.

If anyone is feeling apprehensive, suggest that they go over the "appraiser skills" module again, which also covers Pendleton's rule regarding feedback in the mini appraisal sessions.

If everyone has turned up as expected, then the day 2 grouping will remain as planned. But if the attendance has changed, we will send the groupings on after the tutors meeting.

15 mins | 12:30 | 17:00 | **End of Day 1 Tutors meeting**

- Debrief
- Concerns
- Groupings for day 2
- If 7 or 5 participants:
 - Need 1 tutor to step in as participating appraisee/er

In the end-of-day-1 tutors meeting, we have a debrief on how the day went and share any concerns with any individuals ahead of day 2.

If the attendance for day 2 has remained or changed to 7 or 5 participants, we will need a willing volunteer from the tutor panel to step in as a participating appraiser and appraisee... we will come back to this very shortly, but essentially that's it for day 1.

Day 2	AM	PM	Session
30 mins	08:30 13:00		Tutors meeting
00:10	09:00	13:30	Welcome back
02:30	09:10	13:40	Mini appraisals
00:10	11:40	16:10	Mini appraisals: Plenary
00:30	11:50	16:20	Challenging appraisal situations
00:10	12:20	16:50	Plenary & Ask the tutors
	12:30	17:00	End of training
30 mins	12:30 17:00		Tutors meeting

We return a week later for day 2 where the main focus will be on the "mini appraisals" session.

Timewise, it's the same as day 1: three and a half hours for participants and about four and a half hours for tutors, factoring in the tutor meetings.

30 mins | 08:30 | 13:00 **Tutors meeting**

- NES Admin(s), Lead Tutor and Tutors
- Session plan / running order
- Go over groupings
- Tutors agree on who leads which session
- Take notes
- Reconvene for assessment at end of day

Similar to day 1, we will go over the sessions plan and running order of the day together.

Hopefully everyone will turn up so we don't need to make any ad hoc changes to the groupings and It will just be a case of going over who would lead which sessions.

Make sure to take plenty of notes, especially for anyone you have concerns about.

We will reconvene as a panel at the end of the day for about 30 minutes to go over everyone's assessment.

10 mins | 09:00 | 13:30 | **Welcome back**

- NES Admin
 - Housekeeping and Teams etiquette
- Lead Tutor
 - Check in with participants
 - Recap
 - Go over Pendletons

Day 2 will kick off with a shortened "Welcome back" session for 10 minutes in order to maximise the practice time. Again, the NES admin would go over the housekeeping and Teams etiquette, and also chase up any late comers in the background.

We will invite the Lead Tutor to check in with the participants and see how they are feeling and recap some of the appraiser skills discussion from day 1. We would also ask the Lead tutor to go over the Pendleton's rules for feedback giving, although they should be quite familiar with this as it was covered in the "Appraiser skills" module.

2h30m | **09:10 | 13:40** | **Mini appraisals**

- 2 hours 30 mins in total
- Groupings *may* change depending on DNAs
- Aim to give all participants same experience
- Round robin:
 - Appraiser, Appraisee, Observer, Timekeeper
 - 3 or 4 sessions

So overall we have two and a half hours for the mini appraisal practice sessions. Depending on how many participants turn up on the day, the groups may change, however this in our experience is quite unlikely to happen. The only time where we've had to change the groupings at such short notice was when someone got called away for an emergency clinical situation. Obviously, patient care will always take priority, but this is quite rare as we normally get a few days' notice if someone were to withdraw from day 2.

Regardless, our aim is to give **all** learners the **same** experience irrespective of the size of group they are involved with. The next few slides will cover the admin and logistics of how we run things but this is only for your info. **You are NOT expected to organise the groupings.**

Everyone should have a shot at the appraiser role, being an appraisee, an observer and a timekeeper. Depending on numbers, we will rotate these roles in either 3 or 4 sessions.

2h30m 09:10 | 13:40 Mini appraisals

Day 2	AM	PM	Session
00:33	09:10	13:40	Mini appraisals (1)
00:33	09:43	14:13	Mini appraisals (2)
00:11	10:16	14:46	Break
00:33	10:27	14:57	Mini appraisals (3)
00:33	11:00	15:30	Mini appraisals (4)
00:07	11:33	16:03	Break
	11:40	16:10	Large group plenary
	NES admin		

- Optimal = **8 participants**
- **4 practice sessions**
- 18 mins – mini appraisal
- 10 mins – feedback
- 5 mins – screen break / overflow
- **33 mins each**
- Rotate | Repeat
- 11 mins break
- Rotate / Tutors swap

The New Appraiser training has been designed for 8 participants as the optimum max capacity. So, if we have a full house of 8 then perfect, we will run with four practice sessions and everyone has a shot at the different roles. We have 33 minutes for each session, within which 18 minutes is for the mini appraisal itself, with 10 minutes for feedback and 5 minutes in case you over run. If you don't, take the 5 minutes screen break to unwind. We then repeat within the same group but the participants will rotate their roles.

After this back-to-back session, take the 11-minute break during which time we will close the rooms to reorganise the groupings to swap the tutors. Then it's 33 minutes each again for the final two sessions, rounding off with a short 7-minute break before reconvening for the plenary.

Same as day 1 - stay in the breakouts. Teams will automatically send you to where you need to be. The NES Admin will help you manage the time by sending reminders in the chats, so keep an eye out for those popping up.

This setup will also apply if we end up with 4 participants - but we would release two tutors. For reference we would never run a course with less than 4 participants. It works, but it's not ideal as the learning experience is not as rich with just two tutors.

Timetable (8)		18 mins	Mini appraisals		5 mins	Screen break/Overflow		
2h 30 mins		10 mins	Feedback		11 mins	Breaks between sessions		
Room	Session	Time AM PM	Appraiser	Appraisee	Observer	Timer/ Observer	Tutor	Tutor
Breakout 1	1	09:10 13:40	Alice	Bob	Celine	Dan	Ted	Zack
	2	09:43 14:13	Bob	Celine	Dan	Alice	Zack	Ted
	3	10:27 14:57	Celine	Dan	Alice	Bob	Ted	Zack
	4	11:00 15:30	Dan	Alice	Bob	Celine	Zack	Ted

Here's a sample grouping setup for your reference.

If we did drop down to 4 participants and two tutors, the grouping would look like so.

Timetable (7+1)		18 mins	Mini appraisals		5 mins	Screen break/Overflow		
2h 30 mins		10 mins	Feedback		11 mins	Breaks between sessions		
Room	Session	Time AM PM	Appraiser	Appraisee	Observer	Timer/ Observer	Tutor	Tutor
Breakout 1	1	09:10 13:40	Alice	Bob	Celine	Dan	Ted	Zack
	2	09:43 14:13	Bob	Celine	Dan	Alice	Zack	Ted
	3	10:27 14:57	Celine	Dan	Alice	Bob	Yelena	Steve
	4	11:00 15:30	Dan	Alice	Bob	Celine	Steve	Yelena
Breakout 2	1	09:10 13:40	Ellie	Frank	Greta		Yelena	Steve
	2	09:43 14:13	Frank	Greta		Ellie	Steve	Yelena
	3	10:27 14:57	Greta	Ted	Ellie	Frank	Zack	
	4	11:00 15:30	Ted	Ellie	Frank	Greta	Zack	

If we end up with 7 participants, then one of you in the tutor group will **need** to step into the part of a participant appraiser and appraisee.

In this example it's Tutor Ted who would slot into the participant role. Any tutors asked to step in will go **last** in the appraiser role. The only additional ask of Tutor Ted is a short PDP to facilitate the mini appraisal.

Although Tutor Zack looks like he's the solo tutor here, bear in mind, Ted is **still** a tutor so he can and will help contribute to the feedback discussions as needed.

2h30m 09:10 | 13:40 Mini appraisals

Day 2	AM	PM	Session
00:35	09:10	13:40	Mini appraisals (1)
00:15	09:45	14:15	Break
00:35	10:00	14:30	Mini appraisals (2)
00:15	10:35	15:05	Break
00:35	10:50	15:20	Mini appraisals (3)
00:15	11:25	15:55	Break
	11:40	16:10	Large group plenary

- 6 participants
- 3 practice sessions
- 20 mins – mini appraisal
- 15 mins – feedback
- 15 mins – break
- 35 mins each
- Rotate / Tutors swap

If we end up with 6 participants, that's when we would drop the timekeeper role and run three mini "appraisal practice" sessions instead of four, with slightly longer breaks.

Each session will last 35 minutes. 20 minutes for mini appraisal and 15 minutes for feedback, with a 15-minute break between each session. The tutors will swap round as we rotate each group. But it's still two and a half hours to cover the practice sessions.

Timetable (6)		20 mins	Mini appraisals	5 mins	Screen break/Overflow			
2h 30 mins		15 mins	Feedback	15 mins	Breaks between sessions			
Room	Session	Time AM PM	Appraiser	Appraisee	Observer	Timer/ Observer	Tutor	Tutor
Breakout 1	1	09:10 13:40	Alice	Bob	Celine		Ted	Zack
	2	10:00 14:30	Bob	Celine	Alice		Steve	Yelena
	3	10:50 15:20	Celine	Alice	Bob		Yelena	Steve
Breakout 2	1	09:10 13:40	Ellie	Frank			Yelena	Steve
	2	10:00 14:30	Frank	Ted	Ellie		Zack	
	3	10:50 15:20	Ted	Ellie	Frank		Zack	

And this is what the grouping will look like.

In this setup one of the tutors will take up the timekeeping duties.

If the numbers go down to 5, then similar to the 7-participants scenario, we will ask one of you in the tutor group to step in. This is to ensure that all learners in all New Appraiser training has equitable learning experience regardless of the size of group they are in.

2h30m 09:10 | 13:40 **Mini appraisals**

5(+1) or 6

3 vs 4 practice sessions

4 or 7(+1) or 8

Day 2	AM	PM	Session	Day 2	AM	PM	Session
00:35	09:10	13:40	Mini appraisals (1)	00:33	09:10	13:40	Mini appraisals (1)
00:15	09:45	14:15	Break	00:33	09:43	14:13	Mini appraisals (2)
00:35	10:00	14:30	Mini appraisals (2)	00:11	10:16	14:46	Break
00:15	10:35	15:05	Break	00:33	10:27	14:57	Mini appraisals (3)
00:35	10:50	15:20	Mini appraisals (3)	00:33	11:00	15:30	Mini appraisals (4)
00:15	11:25	15:55	Break	00:07	11:33	16:03	Break
	11:40	16:10	Large group plenary		11:40	16:10	Large group plenary

Here's a quick recap for the timetable for the two groups.

To emphasise again, we don't expect tutors to organise this, this is only for your reference so you can understand why the timings for day 2 might differ from course to course.

2h30m 09:10 | 13:40 Mini appraisals

- 3 vs 4 sessions timings
- Use session plan

	A	B	C	
1	When	PM	<<<<< When the training is taking place	
2	Sessions	3	<<<<< Number of mini appraisal sessions to be run (if 4 or 8 participants, in	
3				
4	Timing	Time	Day 1 Sessions	Notes
	00:30	13:00	Tutors Meeting	Lead Tutor to run through the day and - who will lead which large group disc - who will monitor chat - who will keep an eye on hands up if Ask tutors to take notes of any difficu participant(s) and discuss at end of da
5	00:15	13:30	Welcome and Introductions	NES ADMIN to lead initial welcome, h LEAD TUTOR. Lead Tutor introduces themselves, th the group "Introduce yourself and tel
6	00:30	13:45	Review of pre-session information (Large group discussions)	Large group discussions: invite feedb found useful, difficult, why, queries et
7	00:45	14:15	Supporting Information (breakout)	Break into 2 groups; NES Admin to op In small groups, facilitated by tutors, t

The sessions plan document will keep you right. It's just a spreadsheet and all you have to do is update the AM or PM setting in cell B1, and the number of sessions (between 3 or 4) in cell B2, then the rest of the timetable will update accordingly. All the notes you need are also in this document.

So that's the logistics of the grouping allocations which we will take care of. Let's focus on your role as tutors and how the mini appraisals will run.

2h30m | **09:10 | 13:40** | **Mini appraisals**

- Assessment and Feedback
- Timekeeping arrangement (how and when)
 - Flexibility within the 33 or 35 minutes
- Appraisee/er cameras & mics ON (everyone else OFF)
- Observer to lead feedback
 - Invite appraiser reflection, then appraisee
 - What went well? What could be improved?
 - Observer offers own feedback, then Tutors come in
- **Leave no stones unturned**



The key role of the tutor is to observe and assess the participants; and offer feedback for their reflections.

When you first get into the breakout, agree with the group on HOW they wished to be informed of the timing; and WHEN they want to be informed. In our experience, participants have tended to opt for a [CLICK] quick on-screen wave about 2 minutes before the end of the allocated time. Others might prefer differently so check with everyone before you start so the timekeeper knows how to manage this.

They should already know who is appraising who and when; and they should all have shared their PDPs too. But just like in real appraisals, sometimes our appraisees can leave things quite late. You might have to be flexible with the time or even swap the running order of appraising to accommodate. Just remember you have 33 or 35 minutes per session and if changes are made, make sure the admin is aware so they can update the groupings for later breakouts.

When the group is ready, everyone in the breakout turns off their camera and mute themselves; apart from the appraiser and appraisee to mimic a real appraisal environment. It's rare, but if the appraiser is struggling for whatever reason, you **can** intervene and call a time-out to offer some help.

When the mini appraisal is finished, all cameras and mics come back on for the feedback session; which is led by the **Observer** using Pendleton's. Have them ask the appraiser first on how it felt and what went well; then ask the same of the appraisee. Then they would ask the appraiser if there was anything they might improve on or do differently, and then the appraisee, before adding their own observations. After that, you and your fellow tutor would step in and offer further observations, insights and feedback.

It is critical that you provide all the necessary feedback on the spot. This is because there is no post-training follow-up feedback process. Once the training is over, our remit and your responsibility as tutor will come to an end. So, if there's any feedback to be shared - please make sure you do so in the session.

If you need more time or if your group over runs, message the Admin so we don't close any of the breakout rooms whilst you are still providing feedback; especially if there's anyone you have reservations about. Make sure the participants have all the necessary feedback to reflect on.

10 mins

11:40 | 16:10

Mini appraisals: plenary

- Overall – how was their experience?
- 10 minutes
- Watch for tiredness
- Focus on mini appraisal session
- (Formal feedback forms will be sent after)

At the end of all the mini appraisals, we will reconvene as a large group for the final few sessions.

We will run a short plenary first on how the mini appraisals went, how they felt, what it was like being listened to, and so on. You only have 10 minutes for this so try to keep it brief. Besides, they'll be knackered at this stage!

Make sure they focus on the mini appraisals, we're not looking for feedback on the training course itself, for which a formal feedback form will be sent afterwards.

30 mins | 11:50 | 16:20 | Challenging appraisal situations

- Large group discussions
- Reflect back to the group:
 - What are your concerns/fears with the appraiser role?
 - What would lead to this? How to avoid reaching this?
 - How might you approach it?
 - Who might be able to support you?
- **Share experience and reassure**
- Refer to module video

Next, we will dive into "Challenging Appraisal Situations". Typically, the tutor leading this session would open it to the group by asking what their greatest worry is about taking on the appraiser role. Don't jump in with the answers right away. Reflect it back to them and open it to the room:

- What might lead to this particular concern?
- How might they tackle it?
- What steps can they take to prevent escalation?
- Who might be able to support them? etc

The key thing is to get them talking first before sharing your experience. They may come up with some weird scenarios but it would be good to hear from experienced appraisers like yourselves to reassure them that their concerns are the **rare** rather than the norm. Sometimes it's about signposting and sometimes it's to remind them of the role and remit of the appraiser, to make sure they are not taking on too much. Topics can vary but common repeat queries revolve around how appraiser allocations are made, uncertainty about recognition of trainer, or support for appraisers when in post.

In the "Challenging Appraisal Situation" module, there's a video of a challenging scenario. If the conversations run dry, you can always refer back to this and ask what their thoughts are and how they might tackle that particular situation.

10 mins

12:20 | 16:50

Plenary – Ask the tutors

- Opportunity for final questions (or from day 1)
- Signpost further support
 - Appraisal Leads, Admin teams, local meetings
 - SOAR helpdesk, Medical Appraisal Scotland
 - Refreshers, Workshops, Conference
- **Avoid assumptions**
- NES Admin to wrap up re next steps

End of training

Finally, the last 10 minutes of the day is an open floor “Ask Anything” plenary. From experience, these last 3 sessions tend to run into one long session so please, as tutors, make sure you all chip in to keep the discussions going. These last 10 minutes is designed to discuss anything else that’s not been addressed over the last two days, or any last-minute burning questions. Typically, at this stage there will be questions around the logistics of being an appraiser like “how are appraisees allocated?”, or “how many sessions will I get?” and we would signpost them to appropriate local health board resources.

The most important thing to avoid here is this: no matter how good the mini appraisal sessions were from what you observed, **avoid** saying things like “You’ll all be great appraisers I’m sure”. Whilst it might be true for the groups you observed, you’ve no idea what happened in the other groups! So, to temper expectations a little, be mindful to use neutral language and keep it factual.

The NES admin will wrap up with next steps, like feedback forms completion, and that we will be in touch in the next few days to confirm course outcomes and so on and so forth.

And that’s the end of the training course! Well, for the participants anyway. For tutors, your final session is the assessment.

30 mins | 12:30 | 17:00 | Tutors meeting: Assessment

- Tutors reconvene in tutor meeting
- Assessment:
 - Go through candidates individually
 - Flag concerns to be discussed last
 - Group/paired scorings
- **Readiness to take on appraiser role**
- Employment = health board responsibility

We'll reconvene in the tutors meeting and have a quick debrief on how the day went. The NES Admin will ask if there's anyone you have concerns about - anyone flagged will be discussed **last**.

The NES Admin will then share their screen to show the individual scoring sheets, and you will go through these as a GROUP to assess the individuals. The pair of tutors who observed the participants in the appraiser role will take the lead in the assessment discussion.

The key thing to be mindful of here is that you are assessing the participant's **readiness** to take on the appraiser role. **Appraisal itself is not a pass-fail exercise, neither is our training.** You are asked as a group to assess whether the participant is **ready** to be an appraiser. We are not passing or failing anyone because the **recruitment of appraisers is a health board responsibility**. We've had situations where the tutor panel has deemed someone as "not-ready", but the health board Appraisal Lead, informed with a summary of the feedback, opted to appoint that individual to the appraiser role because they were prepared to provide the relevant and necessary additional support.

Not all health boards will do this but ultimately, it's the health board's responsibility for appraiser employment. Not NES, and not yourselves as tutors.

30 mins | 12:30 | 17:00 **Tutors meeting: Assessment**

- Assessed as “Not-ready”?
- Lead Tutor to provide feedback
- Comms (to all) sent thereafter
- Training Manager to liaise with Appraisal Lead
- Sample assessment scoring sheet

For any participant who has been assessed as “not-ready”, it will be the Lead Tutor’s responsibility usually who would communicate the outcome to the individual, with support from the Training Manager. Once this person has received their feedback, only then will the rest of the confirmations be sent to everyone else. The training Manager will also separately, if required, liaise with the Appraisal Lead to explain what the concerns were.

And that’s about it... if you are unsure on the assessment criteria, please check the session plan document. We’ve included a sample scoring template for your information.

Thank you

- Medical.Appraisal@nes.scot.nhs.uk
 - NES Appraiser training queries
- <https://www.appraisal.nes.scot.nhs.uk/s/tutors/na/>
 - Tutors only access for New Appraiser courses



We hope you found this useful, any questions or queries please do not hesitate to get in touch.

Thank you for watching and thank you for your hard work as always.

This resource may be made available, in full or summary form, in alternative formats and community languages.
Please contact us on **0131 656 3200** or email **altformats@nes.scot.nhs.uk** to discuss how
we can best meet your requirements.



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