

**UKCESR Portfolio Pathway Association (UKCESRPFA)****Speciality and regional representatives' role and activities****1. Purpose**

This document sets out the role, scope of activities, and responsibilities of Specialty and Regional Representatives within the Association. It is intended to provide clarity, consistency, and transparency regarding expectations and contributions.

**2. Role Overview**

Speciality and Regional Representatives shall serve as Council Members responsible for representing the interests, perspectives, and professional needs of members within their designated speciality or geographical region. Their role shall include acting as a liaison between the membership and the Governing Council, facilitating two-way communication and engagement, contributing to consultation and policy development, and supporting the delivery of the Association's aims at speciality and regional levels.

**3. Areas of Activity****a) Education**

Supporting and promoting educational activities relevant to CESR/Portfolio Pathway and Portfolio Pathway doctors, including identifying learning needs within the speciality or region, contributing to educational planning, and assisting in the delivery or coordination of educational events and resources.

**b) Training**

Contributing to training-related initiatives by sharing information on training opportunities, standards, and best practices, supporting professional development activities, and providing feedback to the Governing Council on training gaps or challenges faced by members.

**c) Regional Meetings**

Organising, supporting, or facilitating regional meetings to promote member engagement, encourage peer support, disseminate Association updates, and gather feedback to inform national strategy and decision-making.

**d) Workshops**

Assisting in the planning and delivery of workshops relevant to professional development, leadership, governance, education, and workforce issues, either independently or in collaboration with the Governing Council or partner organisations.

**e) Journal Clubs**

Supporting or coordinating journal clubs and academic discussion forums to encourage evidence-based practice, critical appraisal skills, and scholarly engagement among members.

**f) CESR/Portfolio Pathway Workshops**

Supporting the organisation and delivery of CESR/Portfolio Pathway- and Portfolio Pathway-focused workshops, including guidance on curriculum requirements, portfolio development, evidence mapping, and application processes, in line with prevailing Royal College and General Medical Council (GMC) standards.

**g) Specialty Examination Guidance**

Providing guidance, signposting, and peer support related to relevant specialty examinations and assessments, including but not limited to MRCP, FRCPPath, FRCPsych, FRCS, and equivalent Royal College examinations. This may include sharing information on eligibility criteria, examination structure, preparation strategies, available resources, and alignment of examination outcomes with CESR/Portfolio Pathway and Portfolio Pathway requirements, without providing formal examination endorsement or guaranteeing outcomes.

Providing guidance and signposting to support members through the CESR/Portfolio Pathway and Portfolio Pathway application process, including explaining application stages, timelines, requirements, and common challenges, and directing members to relevant Royal College and GMC guidance.

**i) Evidence Creation and Portfolio Development**

Supporting members in understanding how to create, structure, and organise evidence for CESR/Portfolio Pathway and Portfolio Pathway applications, including guidance on mapping evidence to curriculum requirements, reflective practice, workplace-based assessments, audits, teaching, research, leadership, and governance activities, in accordance with prevailing Royal College and GMC standards.

**j) Appraisal and CESR/Portfolio Pathway-Related Courses**

Providing information, signposting, and peer support regarding annual appraisal requirements relevant to CESR/Portfolio Pathway doctors, and sharing details of appropriate courses, educational programmes, and development opportunities that may support CESR/Portfolio Pathway readiness and portfolio development, without implying endorsement or guarantee of acceptance.

**k) Workplace-Based Assessments and Reflective Practice Workshops**

Supporting and contributing to workshops that provide practical guidance on completing and evidencing workplace-based assessments and reflective practice for CESR/Portfolio Pathway purposes. This may include guidance on conducting and documenting Case-Based Discussions (CBDs), Procedure-Based Assessments (PBAs), and reflective entries, including principles of good practice, assessor engagement, mapping to curriculum requirements, and maintaining appropriate professional standards and confidentiality, in line with Royal College and General Medical Council (GMC) guidance.

**4. Data Use, Confidentiality, and Non-Financial Benefit**

Specialty and Regional Representatives shall handle all member, Association, educational, and workshop-related data responsibly and in accordance with applicable data protection and confidentiality requirements. Representatives must not use, disclose, retain, or exploit any data, information, materials, or access obtained through their role for personal, private, commercial, or financial benefit, whether directly or indirectly. All data and information shall be used solely for the purposes of advancing the aims of the Association and supporting its members, unless otherwise expressly authorised by the Governing Council.

**5. Conflict of Interest**

Specialty and Regional Representatives shall declare any actual, potential, or perceived conflicts of interest that may arise in relation to their role. Conflicts may include, but are not limited to, financial interests, commercial activities, paid educational work, examination preparation services, or affiliations with external organisations that could influence, or be perceived to influence, their activities or decision-making. Declared conflicts shall be managed in accordance with the Association's policies, and Representatives may be required to recuse themselves from specific activities or discussions where a conflict exists.

**6. Data Protection and GDPR Compliance**

All activities undertaken by Specialty and Regional Representatives shall comply with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018. Representatives shall process personal data lawfully, fairly, and transparently, collect and use data only for specified and legitimate Association purposes, and take reasonable steps to ensure data accuracy, security, and confidentiality. Personal data shall not be retained longer than necessary and shall not be shared with third parties without appropriate authorisation.

**7. Breach, Misconduct, and Removal:**

Failure to comply with this document, the Association's governing documents, policies, or codes of conduct may result in review by the Governing Council. Where a breach, misconduct, misuse of data, conflict of interest, or other serious concern is identified, the Governing Council may take appropriate action, which may include guidance, formal

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**(UKCESRPFA)**

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warning, suspension, or removal from the role, in accordance with fair process and the Association's procedures.



### **8. Code of Conduct**

Speciality and Regional Representatives shall act with integrity, professionalism, and respect in all Association-related activities. They shall uphold the values and reputation of the Association, engage constructively with members and stakeholders, maintain appropriate professional boundaries, and conduct themselves in a manner consistent with the principles of good governance, equality, diversity, and inclusion. This Code of Conduct applies to all interactions undertaken in the capacity of a Representative, whether in person or via digital platforms.

#### **Adoption:**

This is adopted by the Council members of the Association at a duly constituted meeting on:

Date: \_\_\_\_\_

Signed:

Chair \_\_\_\_\_ Vice- Chair: \_\_\_\_\_

General Secretary: \_\_\_\_\_ Treasurer: \_\_\_\_\_