Guidance Notes

Integrated Academic Training

2020 Competition & Formula Allocation of Academic Clinical Fellowships and Clinical Lectureships
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Introduction: The NIHR IAT Programme

The NIHR funds clinical academic training for doctors and dentists in England through the Integrated Academic Training (IAT) Programme. Two principal classes of academic training post are allocated through the IAT Programme:

- Academic Clinical Fellowships (ACFs)
- Clinical Lectureships (CLs)

Each year 250 ACF and 100 CL posts are allocated to IAT partnerships comprising medical schools (and their partner higher education institutes (HEIs)), postgraduate deanery functions within the local offices of Health Education England (HEE), and partner NHS Organisations.

Academic Clinical Fellowships

ACFs are specialty training posts that incorporate academic training. Medical ACFs spend 75% of their time undertaking specialist clinical training and 25% undertaking research training. The posts have a maximum duration of 3 years (4 years for GPs). ACFs are supported to develop their academic skills and prepare an application for a research training fellowship (e.g. PhD).

Clinical Lectureships

CLs are postdoctoral specialty training posts that incorporate academic training. Medical CLs spend 50% of their time undertaking specialist clinical training and 50% undertaking research training while progressing toward gaining a Certificate of Completion of Training (CCT). The CL aims to facilitate research portfolio development and applications for an intermediate fellowship (e.g. NIHR Advanced Fellowship).

The Role of the IAT Leads

The NIHR Academy manages the IAT Programme on behalf of the Department of Health and Social Care (DHSC). Each IAT Partnership has two IAT Leads; one based at the HEI and one based at HEE. The IAT Leads act as the first points of contact for queries regarding the IAT Programme, and act as champions of best practice in supporting NIHR Academy Members (ACFs, CLs, and others) to develop their clinical academic careers.

For the 2020 allocation of ACF and CL posts, the IAT Lead (HEI or HEE), or their delegated authority, is responsible for coordinating the submission to NIHR using the Academy Research Award Management Information System (ARAMIS).

The IAT Leads should also ensure that the monitoring information for NIHR-funded ACF and CLs, and locally-funded NIHR-recognised CLs (Recruitment Monitoring Forms and Quarterly Monitoring Returns) is up-to-date and that outcome data for trainees that have completed these posts has been submitted to the NIHR Academy, as per the Service Level Agreement between DHSC and HEE. Monitoring information submitted at the end of March 2019 will be provided to the IAT Review Panel and used to assess trainee progression in the IAT Competition (assessment criterion 1a).
Athena SWAN

Integrated Academic Training (IAT) partnerships have been required to have achieved at least the Silver Award of the Athena SWAN Charter for Women in Science to be eligible to host ACF and CL posts from the 2018 and 2019 allocations. The Athena SWAN Silver Award must be held by the academic “setting” where the post is to be based.

IAT Partnerships that have been awarded IAT posts in any allocation round that now only have an Athena SWAN Bronze Award are permitted to continue to host the ACFs and CLs for the duration of the posts.

The NIHR Academy will not allocate IAT posts (via formula or through competition) to an IAT Partnership where the academic setting in which the post is to be based does not hold at least the Silver Award of the Athena SWAN Charter for Women in Science.

In addition, the academic setting partner will be expected to maintain at least the Silver Award of Athena SWAN for the duration of the 2020 IAT allocation period, i.e. from when the NIHR allocates the posts in January 2019 until October 2019 when the ACF posts are advertised.

Any IAT Partnership that does not hold at least a Silver Award of Athena SWAN when the IAT formula-based allocations are announced in January 2019, will be eligible to receive a provisional allocation of ACF and CL posts. In addition, Partnerships that do not hold at least a Silver Award of Athena SWAN may bid for ACF and CL posts through the IAT competition. However, any posts awarded through the competition will be offered on a provisional basis.

In cases where the academic setting partner does not hold at least a Silver Award of Athena SWAN, the IAT Partnership should provide an outline of their engagement with the Equalities Challenge Unit, providing details of any application in process (including the date of submission). In all cases, academic partners will be expected to have secured the Silver Award prior to the launch of ACF recruitment in October 2019 to be eligible to host competition and/or formula NIHR ACF and CL posts from the 2020 allocation.

It is the responsibility of the IAT partnership to notify the NIHR Academy in a timely fashion of any change in Athena SWAN status where this is anticipated to impact ACF and CL appointments.

Should the partnership have any questions regarding the eligibility requirements related to Athena SWAN they should contact the NIHR Academy at academy.programmes@nihr.ac.uk.

Further details of Athena SWAN can be found at https://www.ecu.ac.uk/equality-charters/athena-swan

Athena SWAN Eligibility FAQs

Q - In the context of hosting NIHR ACF and CL posts, what is the definition of the academic “setting”?

A – The definitions are: medical school, school, college, faculty, department, division, or institute. If the university has a Silver Award but the academic setting where the post will be based only holds a Bronze Award, the provisionally allocated post will be withdrawn.
Q - What happens to provisionally allocated posts if the academic setting partner in the IAT partnership does not hold an Athena SWAN Silver Award?

A - Provisionally allocated posts that cannot be taken up by the IAT Partnership will be withdrawn by the NIHR. The NIHR will re-allocate the funding associated with these posts to other NIHR training programmes.

Q – Regarding the allocation period for 2020 IAT posts, if the academic setting within the IAT Partnership achieves the Silver Award after ACF recruitment opens in October 2019, will the partnership be allowed to accept the provisional allocation of CL posts that would be advertised in March 2020?

A – The NIHR requirement is that the IAT Partnership must have achieved the Athena SWAN Silver Award by the launch of ACF recruitment in October 2019 to accept their provisional allocation of CL posts. Should the academic setting partner not achieve the Silver Award by October 2019, the provisionally allocated posts will be withdrawn.

Q – If a department has an Athena SWAN Silver Award, but not the institute or medical school, do all formula-allocated and/or competition posts need to be supervised by people only from the department with the Silver Award?

A – Yes, the post must be based in a setting with the Silver Award, and the trainee supervised by staff from a setting that has an Athena SWAN Silver Award.

Q – Regarding locally-funded NIHR recognised posts at institutions that do not have an Athena SWAN Silver Award, will NIHR withdraw the recognition of the locally-funded posts?

A – No. NIHR will continue to recognise and badge the locally-funded posts, as per the standard process. Posts that have already been badged will retain their status.

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**2020 IAT Formula Allocation & Competition Timetable**

- **2020 IAT Formula Allocation and Competition Launch**: 17 January 2019
- **Deadline for Submission of Formula Allocations and Competition Bids**: 31 March 2019
- **Review Panel Meeting**: 8 May 2019
- **Partnership Allocations Confirmed**: July 2019 onwards
Formula Allocation of ACF and CL posts

NIHR announces the ACF and CL allocations to all IAT partnerships in January each year. DHSC uses a funding formula to allocate 150 ACFs and 60 CLs (60% of the total) to the IAT partnerships. The formula takes into account NIHR funding awarded to the partnerships for specific types of support. Each medical school receives a baseline number of 2 ACFs and 1 CL per year.

The IAT formula is intended to reflect the strength of the translational and applied research infrastructure of individual medical school academic partnerships as shown by NIHR investment in centres, units, facilities and programmes, and the number of associated NIHR Senior Investigators and Research Professors at the partnership.

The DHSC formula takes account of the following sources of income:

- NIHR Training Awards (HEE/NIHR Integrated Clinical Academic Programme, Research Methods Programme, NIHR Clinician Scientist Awards, In-Practice Fellowships, and Clinical Trials Fellowships)
- Total NIHR Research funding administered by NETSCC & CCF (excluding Policy Research Programme)
- Clinical Trials Units (CTUs)
- NIHR School for Primary Care Research
- NIHR Biomedical Research Centres
- Cancer Research UK/NIHR Experimental Cancer Medicine Centres (ECMCs)
- NIHR Senior Investigators
- NIHR Collaborations for Leadership in Applied Health Research and Care (CLAHRCs)
- Cochrane Centre and NIHR Centre for Reviews and Dissemination (CRD)
- Patient Research Cohorts Initiative
- NIHR Research Professors
- NIHR Centre for Surgical Reconstruction and Microbiology
- NIHR School for Public Health Research (SPCR)
- NIHR Patient Safety Translational Research Centres (PSTRCs)
- UK Clinical Research Collaboration (CRC) Public Health Research (PHR) Centres of Excellence

For 2020, the DHSC formula provides partnerships with a one-year allocation of posts, i.e. for recruitment in 2020-21. Partnerships are invited to propose their preferences for medical specialties based on academic strengths and the ability to support each specialty clinically.

Postgraduate Deans and Medical School Deans take lead responsibility for the specialty spread proposed to the NIHR; the partnership IAT Leads coordinate the submission of the allocation return. Partnerships are invited to advertise each formula post in up to 3 GMC specialties, if desired, to provide flexibility in recruitment.

Each IAT partnership has been provisionally allocated ACF and CL posts according to Table 1, which is shown overleaf.

Confirmation of all allocations (formula and competition) will be announced from July 2019 onwards.
Table 1: DHSC 2020 IAT Formula Allocation of ACF and CL posts

<table>
<thead>
<tr>
<th>Medical School</th>
<th>ACF</th>
<th>CL</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Birmingham</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>Brighton &amp; Sussex Medical School</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>University of Bristol</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>University of Cambridge</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>Exeter Medical School</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Hull York Medical School</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Imperial College London</td>
<td>10</td>
<td>4</td>
</tr>
<tr>
<td>Institute of Cancer Research</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Keele University</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>King's College London</td>
<td>13</td>
<td>5</td>
</tr>
<tr>
<td>University of Leeds</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>University of Leicester</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>University of Liverpool</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>University of Lancaster</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>London School of Hygiene and Tropical Medicine</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>University of Manchester</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>University of Newcastle</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>University of Nottingham</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>University of Oxford</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>Plymouth University Peninsula School of Medicine</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Queen Mary University of London</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>University of Sheffield</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>University of Southampton</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>St George's University of London</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>University College London</td>
<td>15</td>
<td>6</td>
</tr>
<tr>
<td>University of East Anglia</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>University of Warwick</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Public Health England</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>NHS Blood &amp; Transplant</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>150</strong></td>
<td><strong>60</strong></td>
</tr>
</tbody>
</table>

Please Note: If your IAT partnership is ineligible to bid for competition posts, or does not wish to bid for additional posts, please follow the instructions on Pages 15-20 and Pages 27-30 to submit your GMC specialties for the formula allocated posts only. Pages 9-14 provide information relevant to the IAT competition, and may be skipped if desired.
IAT Competition

Eligible partnerships (for eligibility criteria see Page 11) are invited to bid for up to 7 ACFs and 3 CLs through the IAT Competition. Since 2018, ACFs and CLs awarded through the competition have been based in research themes identified as priority areas by DHSC and NIHR. The research themes are multi-disciplinary in nature and cover a wide spread of potential clinical specialities. For these research theme competition posts, whilst there is flexibility in terms of the GMC specialty in which the appointment is made, the research conducted during these posts must specifically support the research theme.

At the same time the formula allocations are announced, eligible partnerships are invited to submit bids for additional posts to support NIHR Priority Research Themes. The local Postgraduate Dean and Medical School Deans are key in deciding which theme(s) (and the GMC specialties that support those themes) the partnership is able to support that are included in the bids.

Up to 100 ACFs and up to 40 CLs (40% of the total) are allocated through the competition. ACF and CL posts in priority theme areas may be held in a number of different clinical specialities, with the condition that the research programme undertaken by the ACF or CL will be in the theme area, and evidence of this provided as required. For each bid, partnerships may propose up to 3 GMC specialties per post, to provide flexibility in recruitment.

2020 IAT Competition Priority Research Themes

i. **Platform Science and Bioinformatics**

There have been rapid recent advances in high throughput technologies that allow large-scale assessment of disease process. This has been exemplified by advances in genomic medicine, and the advent of large-scale genomic diagnosis resulting from the 100,000 genomes project. NIHR previously and successfully introduced a genomics ACF in the IAT competition. We aim to build on this success, broadening out the opportunity to also include the biology of transcriptomics, metabolomics, proteomics, and critically, the underpinning sciences of bioinformatics essential for the utilisation of the technology. Access to, and availability of, vast population-level data sets ('big data') could also provide the basis for research to inform approaches to prevention, diagnostics, and treatment. NIHR believes that Platform Science and Bioinformatics has the capacity to become a flagship theme area. ACF and CLs supporting this theme could be held in an underpinning science area e.g. pathology, or in a clinical speciality in which the technology can be effectively applied.

ii. **Therapeutics or Clinical Pharmacology**

Therapeutic opportunity exists beyond clinical pharmacology in GMC specialities where application of therapeutics is key. ACF and CLs supporting this theme could therefore be held in clinical pharmacology, or another speciality linked to therapeutic developments. Biomarkers are critical in therapeutic development so these ACF and CL posts could be linked to platform science and bioinformatics. Likewise, the development of digital therapeutics support tools would be within remit.
iii. Complex Health Needs in Age-Related and Chronic Disease

This theme would include research that helps to understand and manage multimorbidity, highlighted by the “Futures of Health Report” as a major and growing health challenge in areas such as the ageing population and chronic disease. ACFs and CLs appointed to these theme posts could be held in, e.g. geriatric medicine, or in a GMC speciality where age-related or chronic disease morbidity represents a critical component e.g. diabetes, cardiology, general practice, orthopaedic surgery, etc.

iv. Dementia

Dementia remains a key theme for NIHR. ACFs and CLs could be held in a number of GMC specialities e.g. geriatric medicine, old age psychiatry, neurology, histopathology or clinical radiology, etc.

v. Medical Education

Medical education research focuses on the education and development of clinicians and clinical teams across medical training and continuing professional development and research may draw upon sociology, psychology, anthropology, economics, or linguistics, as well as disciplines such as management and business. These ACF and CL posts could be held in any GMC speciality.

vi. Acute Care

ACF and CL posts supporting the acute care theme may be held in a range of GMC specialities, which are relevant to the management of the acutely ill patient. These could include, but are not restricted to, emergency medicine, intensive care medicine, anaesthetics, and acute care surgical specialties.

vii. Mental Health

ACF and CL posts may be held in a number of GMC specialties, which may include e.g. general psychiatry, child and adolescent psychiatry, forensic psychiatry, old age psychiatry, psychiatry of learning disability, or medical psychotherapy.

Research capacity in primary care remains low and NIHR strongly encourages partnerships to consider general practice posts to support the above research themes where appropriate.

In 2015, the NIHR issued a Themed Call for research into the evaluation of interventions or services delivered for older people with multimorbidity. NIHR recognises that multimorbidity is one of the biggest challenges facing health care and there exists a need for research in this area that extends beyond the elderly population. NIHR welcomes competition bids that have a multimorbidity component and support any of the above themes.

IAT Competition Review Panel

The Dean of the NIHR Academy, Professor Dave Jones, chairs the IAT Competition Review Panel to consider bids for ACF and CL posts that support the seven priority research themes. Panel membership is available on the NIHR website at www.nihr.ac.uk/IATcompetition.
IAT Competition Eligibility Criteria

The IAT Competition is open to all IAT partnerships in England that currently host NIHR ACF and CL posts where the partnership medical school awards undergraduate degrees in medicine. The following IAT partnerships are ineligible to bid for competition posts:

- NHS Blood and Transplant
- Public Health England
- The Institute of Cancer Research
- London School of Hygiene and Tropical Medicine

The NIHR will accept one application from each medical school, HEE local office and NHS Organisation partnership. Applications should only include multiple university medical schools if it is a joint bid for posts i.e. trainees will be managed jointly between the medical schools. Applications may include multiple NHS Organisations. IAT Partnerships should not bid for more posts than they have capacity to accommodate.

Assessment Criteria for Competition Bids

The NIHR Academy acknowledges that the annual submission for the IAT Competition requires a significant amount of work and cross-departmental collaboration. Moreover, established clinical academic training programmes are not expected to change significantly each year, but rather evolve in response to trainee feedback and programme quality assurance.

The NIHR Academy wishes to assure all IAT partnerships that it is not necessary to prepare a completely new competition submission each year. For the purposes of the IAT Competition, sections from the previous year’s application may be submitted, with amendments and enhancements where required. In cases where the panel have provided feedback for the 2019 bids relating to potential areas for improvement, partnerships may wish to highlight how these have been addressed in the current submission. Re-submission with appropriate amendments, however modest, will not result in the partnership bid being scored poorly by the review panel.

IAT 2020 Competition bids will be assessed according to the following criteria, described in further detail below:

1. IAT Programme Metrics & Local Investment for CLs
2. IAT Programme Management
3. IAT Research Portfolio
4. Excellence in the Research Theme(s)

1a. IAT Programme Metrics

As stated in the Service Level Agreement between DHSC and HEE, overall responsibility for the reporting arrangements pertaining to the IAT funding allocation for ACF and CL activity lies with HEE.

It is important that the NIHR Academy receives reports from HEE via the Local Offices on progress with trainee recruitment and retention to confirm budget assumptions, to ensure proper accountability between DHSC and HEE, to enable the NIHR Academy to contact trainees directly on behalf of DHSC,
and to ensure that the NIHR Academy can validate and reconcile actual costs claimed. HEE, via the Local Offices, is responsible for providing this information to the NIHR Academy at the end of each fiscal quarter using the Quarterly Monitoring Pro-forma. In addition, the Integrated Academic Training Recruitment Monitoring Form, must be completed for each ACF or CL recruited during that quarter.

Based on the monitoring returns submitted by the IAT partnership HEE Local Office, the NIHR Academy will provide the following IAT Programme metrics to the review panel from information held on file at NIHR:

1. Yearly fill rates of Formula ACF and CL posts 2011 – 2018
2. Yearly fill rates for Competition ACF and CL posts 2011 – 2018
3. First destinations of ACF and CLs who complete their post

The HEI IAT Lead at the Partnership should liaise with the HEE IAT Lead to ensure that monitoring data provided to the NIHR is up-to-date in advance of the deadline for submission of the allocation returns on 31 March 2019. The NIHR will provide metrics to the IAT competition review panel in May 2019; the data will therefore reflect the monitoring information provided in the March 2019 (Q4) Quarterly Monitoring Pro-forma.

1b. Local Investment for CLs

The development of clinical academic training capacity requires local, as well as NIHR, investment. NIHR CL posts are awarded on the basis that partnerships will provide local funding for matched posts.

Matched posts fall into two categories:

- Locally funded NIHR-recognised CL
- Locally funded CL (not NIHR-recognised)

Matched CL posts are to be provided on an institutional basis, rather than by individual specialty.

Matching rates for CL posts 2011 – 2018 will be provided to the review panel from information the NIHR holds on file submitted via the HEE Quarterly Monitoring Pro-forma.

1c. IAT Programme Metrics - Track Record

Partnerships are requested to provide information regarding their track record of developing ACFs and CLs. The competition review panel will assess the following areas:

- Progression of ACFs at the partnership;
  - Evidence provided regarding successes of ACFs acquiring competitive research training fellowships to undertake a PhD, or MD for example. This is an opportunity for partnerships to report destinations of ACFs who, for example return to clinical practice for a short while prior to undertaking a PhD or further post, whose academic career progression is not accurately described by First Destination (as reported via HEE Local Office Quarterly Monitoring).
• Progression/retention of CLs at the partnership;
  o Evidence provided regarding the successes of CLs at your partnership, e.g. acquiring grant funding to undertake postdoctoral research projects, and/or progression to further clinical academic positions e.g. Intermediate Fellowships, Clinician Scientist etc.
• Markers of esteem for NIHR-funded trainees, including senior clinical academic positions, investment in people and training etc.

2. IAT Programme Management

Partnerships are requested to provide information regarding the management and quality assurance of their IAT Programme. The competition review panel will assess the following areas:

• Description and management of your IAT Programme;
  o Please include information regarding e.g. your IAT Office, the staff involved in managing the programme, details of your website (if applicable), methods for trainees to get in touch etc.
• Please provide a commentary and objective evidence on the quality of the associated clinical programmes e.g. GMC survey data, ARCP outcomes, RAG ratings on the HEE risk register etc.
  o HEE quality teams systematically collect quality data on all clinical programmes, and these will include those accessed by ACF and CL trainees. Metrics currently vary, but include those from the GMC trainee survey, local questionnaires, ARCP results, fill rates etc. This is supplemented, where appropriate, by local intelligence gleaned from structured discussion with trainee educators, and the other arms-length bodies. HEE uses this information to populate a high-level risk register, which informs a risk-based approach to the management of quality across each HEE Local Office. Local Postgraduate Deans and their quality leads will be able to provide a short commentary based on this on clinical programmes in support of applications for NIHR competition posts.

• Clinical and academic training environment for ACFs and CLs.
• The approach to ACF and CL supervision e.g. arrangements for protected research time, frequency of supervisory meetings.
• Further support for clinical academics at your partnership e.g. mentorship opportunities for ACFs and CLs, personal and professional development, peer support networks etc.
• Description of programme quality assurance e.g. steering committee, annual trainee feedback, etc.
• NIHR Research Training Programme for ACFs;
  o Please describe what Masters-level modules are available etc.
• Links with NIHR and other funder infrastructure e.g. BRCs, CTUs, CLAHRCs, MRC Hubs.
• Any other relevant interfaces e.g. collaborations with industry or other entities.

3. Research Portfolio at the Partnership

Partnerships are requested to provide information regarding their research portfolio that will support the research training of ACFs and CLs appointed to competition posts. The competition review panel will consider the following areas:

• Evidence of high-quality research programmes to act as training vehicles for ACF and CLs.
• Evidence of grant income to support the research training proposed in the bid.
The research portfolio section of the application is designed to allow IAT partnerships to include information about programmes of research that speak to more than one of the priority research themes, in order to reduce duplication of information.

4. Excellence in Research Theme

The panel will make an assessment of the quality and suitability of the partnerships’ clinical and research training environments for hosting ACF and CLs in priority research theme areas.

Partnerships should provide a commentary on their GMC programmes that support each of the priority research themes in the bid. The commentary should include reference to GMC metrics rather than the metrics themselves. For example, do any of the programmes feature on the HEE risk register.

In addition to demonstrating that the partnership offers a high-quality training environment for trainees, the panel will be looking for evidence of innovative and interdisciplinary research approaches to facilitate the academic development of the ACFs and/or CLs appointed to the theme posts.

Hard data, e.g. grant funding, academic outputs to date, etc. should be provided to support your statements. Partnerships may wish to include hyperlinks to departmental websites in order to provide supporting information to strengthen their bids.
Process for accepting the 2020 IAT Allocations

The allocation process for 2020 formula and competition ACFs and CLs will be managed using the NIHR Academy Research Award Management Information System (ARAMIS). These guidance notes are intended to help the IAT Lead, or their delegated authority, coordinate the allocation return. All allocation returns must be made online using ARAMIS and the relevant sections of these guidance notes must be read in full in order to complete this process.

Should the IAT Lead wish for a delegated authority to complete the allocation return, the NIHR Academy must be contacted in the first instance at academy.programmes@nihr.ac.uk as approval will be granted on a case-by-case basis.

An Introduction to ARAMIS

The screen shot above shows the home page visible to the ARAMIS user once they have registered their account and logged in. The left hand menu (bordered red) allows the user to perform various tasks:

- **Home**: Navigate to the ARAMIS home page.
- **My Applications**: See ongoing, submitted, rejected, etc. or start a new application.
- **My Co-applications**: See applications the user is involved in.
- **My Awards**: Active, complete, closed, and ending NIHR awards are listed here.
- **My Approvals**: Confirm participation in NIHR award applications, view applications awaiting submission, required approvals, and approved awards.
- **My Reports**: See all NIHR award progress reports that have been assigned.
- **My Reviews**: See reviews assigned to you.
- **My Tasks**: Request variations to contract including; change of host, working pattern (Whole Time Equivalent (WTE)), or a Time only Extension.
- **Manage My Details**: Maintain personal information, email address, password, upload a CV.
- **Contact Us**: Send an email to NIHR Academy.
- **Logout**: Quit ARAMIS.

Instructions for selecting navigation menu options in ARAMIS and/or the on-screen buttons will be provided throughout these guidance notes with **bold underlined text**.
ARAMIS – Login

Existing users are able to log in to ARAMIS at the following webpage: https://aramis.nihr.ac.uk. New users will need to Register and follow the instructions to create an account.

Once logged in to ARAMIS, click here under the “New Award Application” heading on the home page.

Click Apply to the IAT Allocation.

Alternatively you may create a new IAT Allocation application by selecting My Applications in the left hand navigation menu followed by New Application on the My Applications screen.
IAT Allocation 2020 Introduction

Once a new IAT Allocation application is created, or a user chooses to Edit an existing application, the Introduction page will be shown (see below). While editing an application in ARAMIS, users may navigate to different sections of the application by using the left hand navigation menu. Alternatively, the Back and Forward buttons may be used for navigation. If a button is greyed out on the screen, it cannot be selected. The Save button allows the user to save their progress and remain in the same section of the application, whilst the Save and Close button allows the user to save their progress and close the application, returning to the ARAMIS Home Page.

Accessing the IAT Allocation Guidance Notes in ARAMIS

These guidance notes may be opened by selecting Applicant Guidance from the bottom of the left hand navigation menu, as indicated above. You may wish to “Right Click” and select “Open in New Tab” or “Save Link As” in your web browser as, depending on how your computer and web browser are configured, as a “Left Click” on Applicant Guidance may open the PDF in the same window as the ARAMIS portal.

Entering your IAT Partnership Contact Details

Select Contact Details from the left hand navigation menu. The details for the IAT Partnership HEE Local Office, Medical School, and a minimum of one partner NHS Organisation are to be entered here (see screen shot on the following page). HEE Local Office names are all given the prefix HEE in the ARAMIS contact database, therefore when selecting your partnership local office please type “HEE” first to view the list of options e.g. HEE East Midlands.

All fields in ARAMIS highlighted with a red dot are mandatory fields and must be completed appropriately for the application to pass validation checks prior to submission. See Page 29 for further details regarding validation of your allocation return.
Accepting 2020 Formula Allocated Posts Only

Any IAT partnership that is either ineligible to bid for competition posts, or does not wish to bid for additional ACF and CL posts, should follow the process described on Pages 18-19 and Pages 27-30.

The following IAT partnerships are ineligible to bid for additional posts through the IAT Competition:

- NHS Blood and Transplant [NHSBT]
- Public Health England [PHE]
- The Institute of Cancer Research [ICR]
- London School of Hygiene and Tropical Medicine [LSHTM]

The IAT Lead coordinating the submission for formula allocated posts should select Yes under the “Are you supplying information around Formula Allocated Posts only?” heading.

If your IAT partnership wishes to bid for posts through the IAT competition in addition to the formula allocation return, select No. Once you click Save then sections of the application form relevant to the IAT Competition will be unlocked. You may skip to Page 21 and follow the process described there.
Submitting GMC Specialties for Formula Allocated Posts

Navigate to the Formula Allocated Posts section of the application using the left hand navigation menu, or by clicking Forward from the Contact Details section. The Formula Allocated Posts section allows you to specify up to 3 GMC specialties for each ACF and CL post allocated to your partnership (See Table 1). NHSBT, PHE, ICR, and LSHTM are each allocated 2 ACFs and 1 CL through the formula.

Clicking the Add ACF Post… button brings up a multi-entry list of GMC specialties in a pop-up window.

Scroll through the list and check the Boxes to select up to 3 GMC specialties for the post. Click Save to dismiss the pop-up and be taken back to the Formula Allocated Posts section.
**Please note**: it is possible to enter more than 3 GMC specialties per post; however, the allocation return will fail at the validation stage [(Page 29)](#) and ARAMIS will prompt you to make the necessary amendments.

In the event that you wish to amend the GMC specialties specified for a post, click **Edit** to add / remove options as required. The post can be removed by clicking **Delete**.

![ARAMIS (Academy Research Awards Management Information System)](image)

Repeat the above steps to add GMC specialties to as many ACF and/or CL posts your partnership wishes to accept, up to the maximum number of posts allocated via the formula (See **Table 1**).
Submitting IAT Competition bids

The IAT Lead, or their delegated authority, coordinating the submission should have already completed the process outlined on Pages 16 – 17 of these guidance notes to enter the contact details for their IAT partnership. To unlock the sections of the application relevant to the IAT competition, you must click **No** under the “Are you supplying information around Formula Allocated Posts only?” heading in the **Contact Details** section.

Clicking **Save** in response to this question will result in the following additional left hand navigation menu options appearing on your screen:
Partnership Track Record

1000 word limit

Navigate to the Partnership Track Record section of the application using the left hand navigation menu, or by clicking Forward from the Contact Details section.

Please provide information regarding your track record of developing ACFs and CLs. Structure your statements under the following headings and provide supporting metrics:

- ACF progression to PhD
- CL academic retention (if appropriate)
- Markers of esteem, including intermediate fellowships, senior clinical academic positions, etc.

IAT Programme (Overview)

1500 word limit

Navigate to the IAT Programme (Overview) section of the application using the left hand navigation menu, or by clicking Forward from the Partnership Track Record section.

Please describe your IAT Programme structuring your statements under the following headings:

- Description and management of your IAT Programme
  - Please included information regarding e.g. your IAT Office, staff involved in managing the programme, local website(s) for trainees, methods for trainees to get in touch etc.
Please provide a commentary and objective evidence on the quality of the associated clinical programmes e.g. GMC survey data, ARCP outcomes, RAG ratings on the HEE risk register etc.

- Clinical and academic training environment for ACFs and CLs.
- Supervisory arrangements for ACF and CLs.
- Further support for clinical academics at your partnership e.g. mentorship, personal and professional development, peer support networks etc.
- Description of programme quality assurance e.g. steering committees, annual trainee feedback.
- NIHR Research Training Programme for ACFs
  - Please describe what Masters-level modules are available etc.
- Links with NIHR and other funder infrastructure e.g. BRCs, CTUs, CLAHRCs, MRC Hubs.
- Any other relevant interfaces e.g. collaborations with industry or other entities.

**Partnership Research Portfolio**

3000 word limit

Navigate to the [Partnership Research Portfolio (Overview)](#) section of the application using the left hand navigation menu, or by clicking **Forward** from the [IAT Programme (Overview)](#) page.

Please describe the research portfolio at your partnership structuring your statements under the following headings:

- Programmes of research ongoing at your partnership that will facilitate training for ACFs, CLs, and other clinical academics in NIHR priority theme areas.
- Grant income supporting your research portfolio.

**Submitting GMC Specialties for Formula Allocated Posts**

Navigate to the [Formula Allocated Posts](#) section of the application using the left hand navigation menu, or by clicking **Forward** from the [Partnership Research Portfolio (Overview)](#). The [Formula Allocated Posts](#) section allows you to specify up to 3 GMC specialties for each ACF and CL post allocated to your partnership (See [Table 1](#)). Clicking **Add ACF Post...** brings up a multi-entry list of GMC specialties in a pop-up window.
Scroll through the list and check the **Boxes** to select up to 3 GMC specialties for the post. Click **Save** to dismiss the pop-up and be taken back to the **Formula Allocated Posts** section.

**Please note:** it is possible to enter more than 3 GMC specialties per post; however, the allocation return will fail at the validation stage ([Page 29](#)) and ARAMIS will prompt you to make the necessary amendments.

In the event that you wish to amend the GMC specialties specified for a post, click **Edit** to add / remove options as required. The post can be removed by clicking **Delete**.
Repeat the above steps to add GMC specialties to as many ACF and/or CL posts your partnership wishes to accept, up to the maximum number of posts allocated via the formula.

**Summary of Competition Bids**

Navigate to the **Summary of Competition Bids** section of the application using the left hand navigation menu, or by clicking **Forward** from the **Formula Allocated Posts** page. The **Summary of Competition Bids** section allows you to specify up to 3 GMC specialties for each ACF and CL post that your partnership wishes to bid for, and a research theme.

Clicking **Add ACF Post…** brings up a multi-entry list of GMC specialties in a pop-up window.

![ARAMIS (Academy Research Awards Management Information System)](image)

Scroll through the pop-up list and check the **Boxes** to select up to 3 GMC specialties for the post. Scroll down to the very bottom of the pop-up list and select a research theme from the dropdown list. Click **Save** to dismiss the pop-up and be taken back to the **Summary of Competition Bids** section.
Repeat the above steps to add GMC specialties to as many ACF and/or CL posts your partnership wishes to bid for, up to the maximum number of 7 ACFs and 3 CLs. Once the summary has been completed, you are ready to enter details pertinent to your bids in each of the priority research theme sections of the application.

**IAT Competition Priority Research Themes**

5000 word limit (per section)

Listed below are the seven NIHR priority themes for the 2020 IAT Competition. Each theme corresponds to a section of the application in ARAMIS.

(i) Platform Science and Bioinformatics
(ii) Therapeutics or Clinical Pharmacology
(iii) Complex Health Needs in Age-Related and Chronic Disease
(iv) Dementia
(v) Medical Education
(vi) Acute Care
(vii) Mental Health

If your partnership does not wish to bid for posts in a particular research theme, please leave the theme section blank.

Drawing on evidence that you have provided elsewhere in the bid as required, please provide information and metrics for each of the theme areas that your partnership wishes to support under the following headings:

1. **Research Project Area(s)**

   Projects should be trainee-centric with some scope for flexibility around the project area. Details provided here should allude to the areas of research ongoing at the partnership that are able to support the priority research theme, the research methods that will be used by the trainee, and how the proposed research will support the research theme.

2. **Strengths of the GMC programmes at your partnership that support the research theme**

   E.g. with reference to recruitment success, trainee satisfaction in GMC surveys, links to clinical services etc.

3. **Suitability of the partnership to host ACF and/or CL posts to support the research theme**

   Please provide details of track record, markers of esteem, quality of the research programme, etc.
4. Description of any innovative / interdisciplinary / new research approaches in this area

**Please note:** Should your partnership have programmes of research that align to more than one of the NIHR research themes, you may wish to provide information in the **Partnership Research Portfolio (Overview)** section that you refer to in each of the individual competition bids to reduce duplication in the application.

It is **not necessary** to provide details on the following aspects of the posts at the point of application:

- Key staff involved in the specialty programmes
- Plain English Summary

Partnerships successful in their bids will be required to submit the staff details and Plain English Summary for each post to NIHR upon request once the competition outcome has been announced.

**IAT Partnership Declarations**

Selecting the **Declarations** section from the left hand navigation menu allows the following “participants” to be added to the allocation return:

- Medical School Dean
- Postgraduate Dean
- NHS Organisation Representative(s)

The IAT Lead, or their delegated authority, who is completing the allocation return is required to supply the names and email addresses (if the individuals are not already registered on ARAMIS) for the people listed above at the IAT Partnership. In “participating” in the allocation return, the above representatives from the IAT Partnership are providing a declaration to confirm that they support the partnership’s proposals and accept the allocation of IAT posts for 2020.
Clicking **add Postgraduate Dean** brings up a pop-up window as shown below. Enter the first and last name of the Postgraduate Dean at your HEE Local Office, followed by **Search**.

ARAMIS will bring up a list of contacts matching your search criteria. If the person you searched for is not listed, you can add the person by clicking **Add person**.

ARAMIS will prompt you to add the person’s email address. Click **Add Contact** to bring up the confirmation pop-up.

Tick the check **Box** followed by **Send the invitation**. You will be returned to the **Declarations** section and ARAMIS will send an automatically generated email to the participant instructing them to log in to provide their declaration.
Repeat the above steps to add the Medical School Dean and appropriate NHS Organisation Representative(s) to the allocation return.

Participants can be added at any stage of completing the allocation return. Participants must confirm their support for the partnership's proposals before you will be able to submit the allocation return.

Please ensure that all participants are aware of the requirement for them to approve the allocation return in advance of the submission deadline. It will not be possible to submit the allocation without these approvals.

**Validation Summary**

The **Validation Summary** section provides a list of any outstanding actions, or “validation errors”, which must be resolved before the allocation return can be submitted. If you have not completed all the mandatory fields of the allocation return, for example, these will be listed here.
Click the links to be taken directly to the relevant section of the allocation return that requires amendment. If there are no validation errors click **Save and Close** to return to the ARAMIS home page.

From the Home Page it is possible to **Edit**, **View/Print**, **Validate** or **Submit** the allocation return. If your allocation return has outstanding validation errors, or the participants have not authorised the allocation, you will not be able to click the **Submit** button and it will be greyed out.

### Submitting the Allocation

Once all mandatory fields of the allocation return have been completed, the relevant participant approvals have been undertaken, and the validation checks have been passed, the allocation return may be submitted.

An overview of the IAT Formula Allocation submission process is shown in **Figure 2**.

An overview of the IAT Formula Allocation and Competition submission process is shown in **Figure 3**.
Figure 2: IAT Formula Allocation Submission Process - Flow Diagram

1. Application created by IAT Lead

2. IAT Lead adds Participants (Medical School Dean, Postgraduate Dean, & NHS Organisation Representative(s))

3. IAT Lead lists GMC specialties for Formula Allocated posts

4. HEI, HEE, & NHS Representatives log in to application and confirm participation

5. IAT Lead ‘Validates’ and presses the ‘Submit’ button

6. Automated emails sent to advise HEI, HEE, & NHS Representatives

7. Application is fully submitted to NIHR Academy for consideration

Key

- IAT Lead (“Applicant”)
- Postgraduate Dean, Medical School Dean, NHS Organisation Representative(s) (“Participants”)
- ARAMIS System Processes
Figure 3: IAT Formula Allocation and Competition Bid Submission Process - Flow Diagram

1. Application created by IAT Lead

2. IAT Lead adds Participants (Medical School Dean, Postgraduate Dean, & NHS Organisation Representative(s))

3. IAT Lead lists GMC specialties for Formula Allocated posts & Competition bids. All relevant sections of the application form are completed

4. HEI, HEE, & NHS Representatives log in to application and confirm participation

5. IAT Lead ‘Validates’ and presses the ‘Submit’ button

6. Automated emails sent to advise HEI, HEE, & NHS Representatives

7. Application is fully submitted to NIHR Academy for consideration

Key

- IAT Lead (“ Applicant ”)
- Postgraduate Dean, Medical School Dean, NHS Organisation Representative(s) (“ Participants ”)
- ARAMIS System Processes
NIHR Privacy Policy

The privacy policy sets out how the NIHR uses and securely protects any information that you give us when you use this and other websites, systems and services of organisations that are contracted to the Department of Health to improve the health and wealth of the nation through research.

The NIHR may change this policy from time to time. You may check the latest document content at any time by visiting the privacy policy page of the NIHR website at http://www.nihr.ac.uk/privacy-policy.htm.

Further Information

Further information about the NIHR ACF and CL programme can be found on the NIHR website (http://www.nihr.ac.uk/IAT).

Submission of the 2020 IAT Partnership Allocation

By submitting the competition bids and/or formula allocation the “participants” confirm that adequate capacity exists at the IAT partnership to host the ACFs and CLs proposed in the allocation return.

Each partnership allocation return must be signed by the Dean of Medicine, Postgraduate Dean, and Lead NHS Organisation representative(s) on behalf of the partnership. The sign-off process is completed when each of the above parties accepts the invitation to “participate” in the IAT 2020 Allocation, and logs in to ARAMIS to complete their declaration.

For the 2020 IAT competition NIHR is accepting applications via ARAMIS only.

Closing Date 13:00 on 31 March 2019

If you require any further information or assistance, please contact the NIHR Academy.

Tel: 0113 532 8444 Email: academy.programmes@nihr.ac.uk