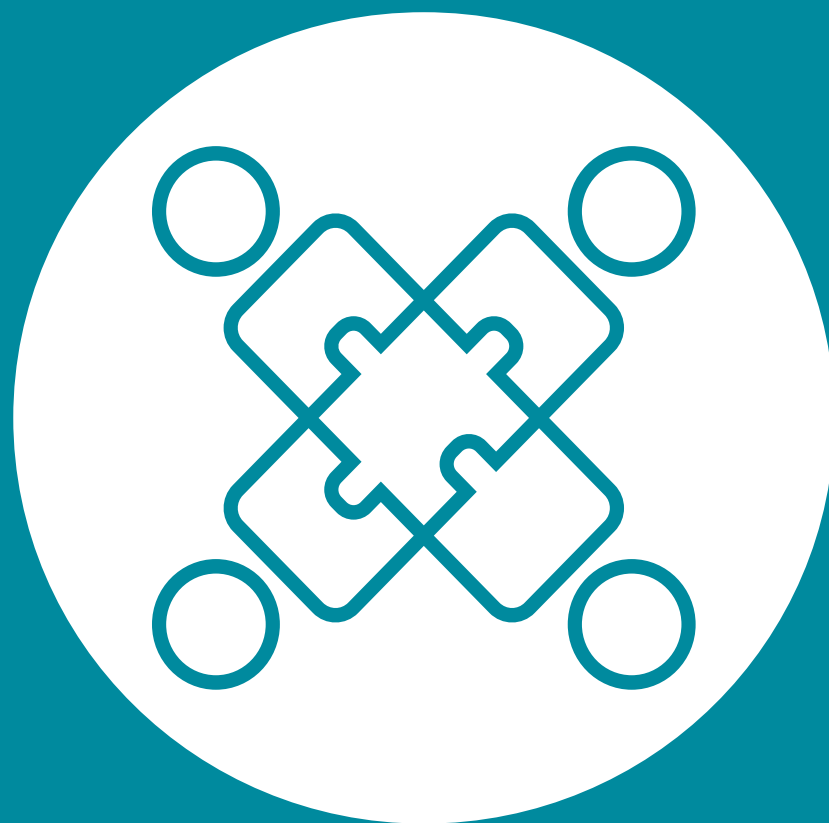


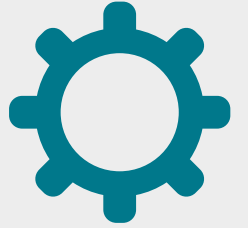
Core Competency Framework for General Practice Administration Staff and Practice Managers



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Introduction



Introduction

What is the purpose of this framework?

The framework supports the development of core competencies, knowledge and skills in the six dimensions of practice and enables profession-specific skills to be realised and attained by General Practice administration staff and Practice Managers.

The framework sets out the core competencies that administrators and managers working in a General Practice team should display, to demonstrate that they are equipped with the knowledge and skills to work at a minimum level of competency. Following the implementation of the 2018 General Medical Services Contract, Practice Managers have seen their roles develop and in addition to managing the practice and practice team, they are now working with the wider primary care system including GP clusters, NHS Boards, HSCPs, and emerging new services, to provide a holistic care approach.

Alongside the changing role of Practice Managers, the roles of receptionists and other members of the administration team in the practice have also evolved and they are now developing skills in other areas including care navigation to other members of the multidisciplinary team (internal and external to the practice) who can provide them with the right care at the right time.

This Core Competency Framework for General Practice Administration Staff and Practice Managers does not include all the knowledge and skills required for the roles. However, it should be used as part of continuing personal and professional development, to help identify what skills are relevant to each role, to aid those looking for a career development pathway and to provide managers with a resource to help their teams grow and develop in skills and competence.

Who is this competency framework for?

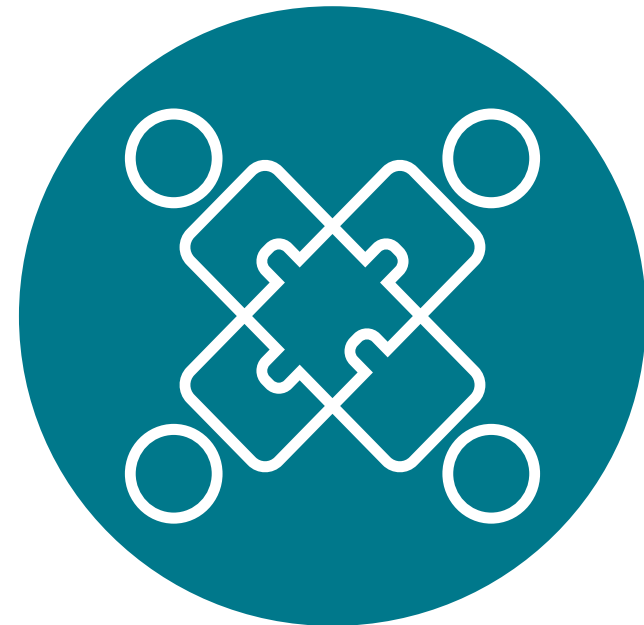
This framework is for:

+ **Administration staff** working within a General Practice team. This could include Medical Receptionists, Patient Advisors, Secretaries, Care Navigators, Dispensers, Workflow Optimisers or other administrators working at this level but with a different role title. These administrators, depending on how long they have been in post and their experience, could have differing levels of the supervision they require to carry out their role.

+ **Supervisors** working within the General Practice team, this could include Office Managers, Assistant Practice Managers and newer Practice Managers or another title of a similar supervisory role or leadership role

+ **Strategic Practice Managers** leading the General Practice team. This could include experienced Practice Managers or Business Managers.

Individuals who take on these roles should familiarise themselves with the framework. It can also be used as a continuing professional development (CPD) tool.



The Six Dimensions of Practice

The information presented in each of the Six Dimensions of Practice is relevant for any administrative or management role and should be applied to the setting that the individual is working within.



**Core Knowledge
and Skills**



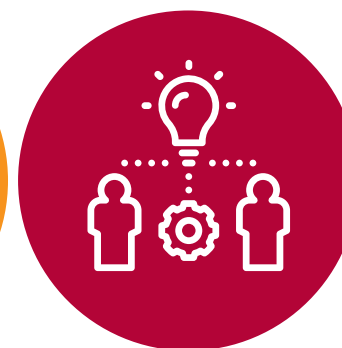
Person Centred



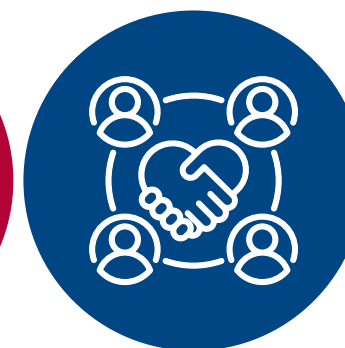
**Quality
Improvement**



Leadership



**Facilitation of
Learning**



**Collaborative
Working**

Using the NES Core Competency Framework for General Practice Administration Staff and Practice Managers

The framework is designed to be used by individuals, supervisory managers and strategic leaders in different ways.

Used by individuals in their work to:

- + Benchmark current level of practice
- + Continue to grow within current level of practice by identifying areas for development
- + Guide career development
- + Create a personal development plan
- + Identify evidence to support personal development planning

Used by managers who supervise and lead a team to:

- + Support discussions that take place as part of the personal development planning and review process
- + Inform succession planning
- + Support skills maximisation at every level of practice and to promote best practice
- + Support service redesign and team skill mix
- + Map induction needs and professional development of new employees joining from another area/board/previous employment
- + Promote whole team working and collaboration
- + Work together with their team to develop the organisation's vision and to identify ways of working towards this common goal

Used by strategic level managers to:

- + Plan and deliver services to meet the rapidly changing needs of General Practice and its service users.
- + Identify opportunities for shared multidisciplinary team working
- + Create a sustainable and resilient workforce
- + Identify Quality Improvement (QI) initiatives

Resources

Learning Resources

Learning resources are in development to support each Dimension of Practice. They will be easily accessible via the **General Practice Educational Hub** and will support work-based learning and career development for General Practice administration staff and Practice Managers.

Menu for Learning

Menus for Learning have been developed to support each level of practice. Each menu is a Learning Needs Analysis (LNA) tool that can be used as a strategic, operational, and training resource.

Using the appropriate menu will help individuals to identify what knowledge they currently have and areas where they may need to develop. The 3 varying levels (those working under some level of supervision, those working in a supervisory capacity, and those working at a strategic level) will have different competencies and requirements and these should be discussed with line managers whilst working through the document. The menu will help to determine the gap between existing skills, knowledge, and abilities, and identify learning objectives and help individuals and line managers set goals. Each menu includes links to resources to support learning and development and will assist in developing individual Learning Plans.

The Menus can be accessed via the **General Practice Education Hub**.

Induction Packs

Induction packs for new General Practice administration staff and Practice Managers have been developed to support practices and line managers. These packs are designed to be amended by General Practices to ensure they meet their individual needs. Our induction packs reflect the core competencies identified in this framework and can be downloaded via the **General Practice Education Hub**.

Support and Supervision

It is important to know the skills and competence of all members in a team, so that tasks can be delegated appropriately and safely to the right person.

Regular appraisal meetings or personal development reviews will help support the development of individuals. It is important that all staff know the limits of their own competence and have the confidence to say “no” if asked to carry out a task out with their competence, or that they feel is inappropriate or unsafe.

Supervision and feedback must be provided appropriate to the task being delegated.

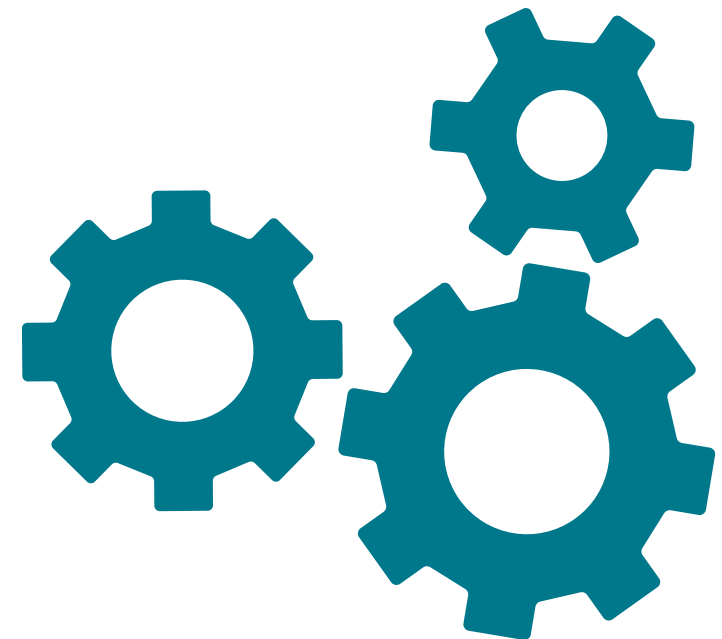


Core Competency Framework for General Practice Administration Staff and Practice Managers Structure

An overview page is provided for each framework level of practice, which explains the broad sphere of responsibility/role and recommended professional requirements that might be expected. The learning required at each level may vary according to the specific role and the organisations specific needs.

The generic aspects of each level of practice are then explained in detail, including the sphere of responsibility/role associated with each level, and the key knowledge and skills required.

The consolidation of existing knowledge and skills, and the acquisition of new ones, are reflected in the incremental nature of the framework levels.



Role Definitions



Working Under Varying levels of Supervision by Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers.

Other role titles may be used depending on the organisation.

The administrative team work under the direction and supervision of their line manager. Medical Receptionists (and other members of the administration team) are professionals who are responsible for coordinating the daily administration of doctors, staff, visitors, and patients within a General Practice environment. They are the public face of the practice and are often the first point of contact patients have with the service. They carry out a wide range of activities which could include care navigation, reception administration and workflow optimisation.



Working in a Supervisory/Leadership Role: Managing a Team

Office Managers, Assistant Practice Managers

Practice Managers

The Office Manager oversees the various aspects of a reception or an administrative team. They manage the practice's administrative staff and perform human resources duties, such as training new staff members, drawing up rotas, overseeing the daily running of the office and feedback to the Practice Manager. The Assistant Practice Manager will have key areas of work delegated to them by the Practice Manager and will have the authority to devise and implement protocols, systems and procedures. They will manage and coordinate various aspects of practice functionality, motivating and managing staff, patient services, premises and health and safety management. The Practice Manager is responsible for the overall efficient, effective and safe management of the practice, and ensures the well-being of patients, doctors and staff, and the successful smooth running of the practice. They lead and motivate the whole practice team.



Working in a Strategic Leadership Role

Strategic Practice manager, Business Manager

Provides leadership and management skills to enable the practice to meet its agreed long term strategic aims and objectives within a profitable, efficient, safe and effective working environment and develop the practice to meet future business needs in a changing environment.

Working Under Varying levels of Supervision by Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Other role titles may be used depending on the organisation.





Working Under Supervision of a Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Development Framework – Overview



Broad sphere of responsibility/role

- + Ensures all reception duties are performed effectively and to the required standard, meeting the objectives of the practice
- + Uses enhanced communication skills and care navigation to enable them to assist patients in accessing the right care at the right time
- + Delivers consistently a high-quality, person-focussed reception and administrative service to patients and staff members. Represents the practice with professional integrity
- + Is person-centred
- + Acts with integrity and leads by example
- + Delivers care with compassion, dignity and respect
- + Displays emotional intelligence when dealing with members of the public
- + Listens empathetically to fully understand others' needs
- + Uses different systems to communicate with a wide range of service users including the individuals using the service, their carers or family members



Training and Development Opportunities

Early Career (Engaged Level)

- + Induction programme
- + Understanding Primary Care and the wider system training
- + Understanding the Essentials of Practice Administration training
- + Peer Support
- + Foundation Level Qualification – General Practice Administration Programme (SCQF level 5 or level 6)
- + Enhanced communication skills training

Mid/Late Career (Established Level)

- + Refresher/update training
- + Scottish Practice Management Development Network (local and national)
- + Peer support
- + Coaching
- + Advanced Level Qualification – Supervisory Management in General Practice Programme (SCQF level 7)



Working Under Supervision of a Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Books patients when attending for appointments
- + Enters patients details onto IT systems
- + Directs people where to go within the department or health centre
- + Answers telephones, sometimes directing calls to other staff through the switchboard or telephone system
- + Books appointments by telephone, face to face or asynchronously
- + Answers queries from patients and other staff members
- + Files/types documents
- + Follows up on patient/clinician requests
- + Photocopies/scans documents
- + Inputs data
- + Maintains confidentiality
- + Is awareness of practice protocols and policies

Key Knowledge, skills and behaviours

- + Has excellent communication skills
- + Has a friendly and efficient persona
- + Is organised
- + Is self-motivated
- + Has good time-keeping skills
- + Is able to work unsupervised
- + Is patient and understanding
- + Follows instructions and procedures
- + Works accurately and methodically
- + Works in a team but can use their own initiative
- + Is able to work and engage with all types of people
- + Is able to manage situations where people may be angry or upset
- + Is confident using the telephone
- + Has appropriate digital skills



Working Under Supervision of a Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Carries out care navigation to the multidisciplinary team (MDT) to aid the patient's journey and ensures access to the right care at the right time.
- + Disseminates appropriate patient information whilst adhering to confidentiality protocols and GDPR legislation
- + Is aware of community resources, disseminating information to patients
- + Provides patients with information about the practice complaints procedure
- + Is aware of how to respond when receiving patient feedback or when handling complaints
- + Is trained for their role in areas such as child protection training and BLS
- + Acknowledges the importance of flexibility when dealing with patients
- + With appropriate training may act as a chaperone to provide support and a secure environment during intimate examinations for both the patient and the clinician
- + Is aware of how to provide equitable care for those who require a translator to access services

Key Knowledge, skills and behaviours

- + Puts patient care at the centre of their role
- + Maintains good communication with patients and staff members
- + Has sound knowledge of services available and keeps patient informed
- + Understands conflict resolution and managing challenging behaviour to allow for empathetic and safe management of emotional situations
- + Is able to respond to patient needs and establish the urgency of their request
- + Understands the importance of good communication skills and empathetic listening
- + Has an understanding of the multidisciplinary team and can navigate patients accordingly



Working Under Supervision of a Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Provides data for strategic planning and may take part in quality improvement projects and other meetings
- + Aims to improve patient experience and is open to new ways of doing this
- + Listens to and learns from patient feedback
- + Understands how improving administrative processes plays a key role in the patient experience
- + Understands that they are the face of General Practice and will be innovative and flexible in the way they respond to individual's needs
- + Is involved in practice-wide quality improvement projects where appropriate
- + Promotes a culture of continuous improvement, where everyone counts, and staff are permitted to make suggestions and contributions to improve service delivery and enhance patient care

Key Knowledge, skills and behaviours

- + Works under supervision to support and implement quality improvement work
- + As part of the whole practice team realises the role they play in improving the quality of the service
- + Understands the importance of working towards quality improvement in all areas of practice service provision
- + Is confident on feeding back ideas that could improve service provision
- + Is involved in whole practice meetings



Working Under Supervision of a Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + May supervise junior staff and take responsibility for junior systems
- + May have responsibility for supporting junior staff
- + Participates in mentoring procedures if required
- + May make some contribution to the appraisal process
- + May provide pastoral and peer support for junior staff and to other members of the practice team
- + May access training and development opportunities to further career progression and provide the same to more junior members of staff

Key Knowledge, skills and behaviours

- + Carries out self-leadership, ensures that they are operating at an expected level and strives to maintain high standards of performance
- + Has a clear awareness of their role and the standards expected of them within this role and the career progression opportunities available within the practice



Working Under Supervision of a Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Is aware of the need for and benefits of Continuing Professional Development (CPD) and has a commitment to their own training & development
- + Undertakes recommended Training and Development within the recommended timescales and updates their line manager of this
- + Understands the competencies required to carry out own post and engages in performance appraisals and Personal Development Planning (PDP)
- + May participate in appraisal/mentoring/training processes
- + Participates in Significant Event Analysis (SEA) systems and contributes to SEA where appropriate
- + Has responsibility to report to management any events deemed significant
- + Aware of the importance to stay up to date with new training opportunities and role development and is confident in being able to access these
- + Works within a team where lifelong skills development and education is actively encouraged and feels supported to undertake ongoing learning
- + Partakes and completes essential training as directed by

the Practice Manager, as well as participating in the practice induction programme

- + May also be encouraged to undertake external training courses which will enhance their knowledge and skills, progress their career and ultimately, enable them to improve processes and service delivery

Key Knowledge, skills and behaviours

- + Aware of own training needs and commits to continuing professional development
- + Participates in appraisal process
- + Undertakes role specific training to stay up to date and to develop relevant new skills to carry out role
- + Feels confident in discussing training with line manager that would benefit development of their role
- + Is aware of career progression opportunities and the training and development pathways available to support this



Working Under Supervision of a Team Leader

Administration staff including Medical Receptionists, Care Navigators, Secretaries, Workflow Optimisers, Dispensers

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Understands the importance of effective communication & establishes effective relationships with other services that work closely with the practice
- + Carries out care navigation to the multidisciplinary team (MDT)
- + Attends and participates in practice meetings, takes responsibility for implementing some agreed actions and may produce minutes
- + Has a knowledge of the wider Health and Social Care Partnership (HSPC) and will work collaboratively with them to aid the service users health experiences
- + Understands the significance of collaborative working and that teamwork is essential in multidisciplinary environments
- + Recognises that effective communication is essential and that they must communicate in a manner which enables the appropriate sharing of information

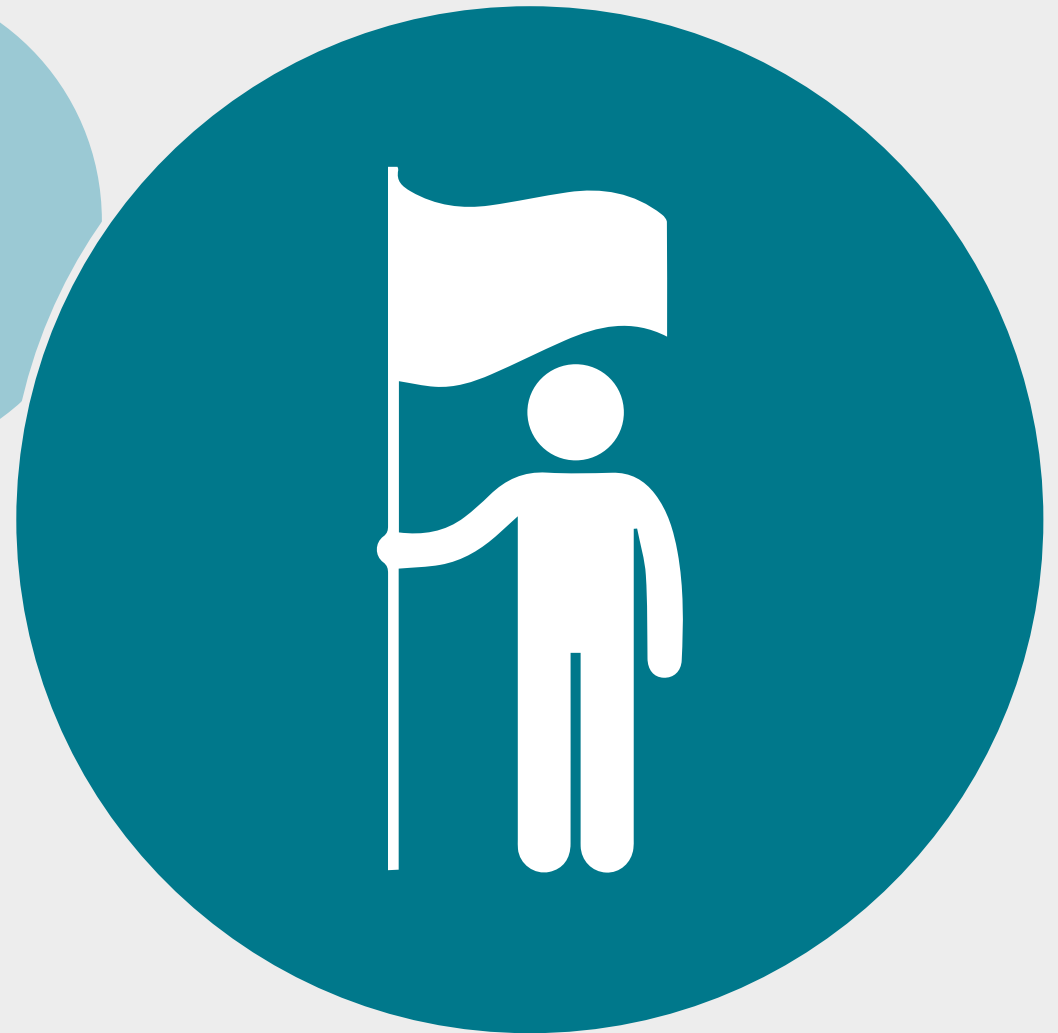
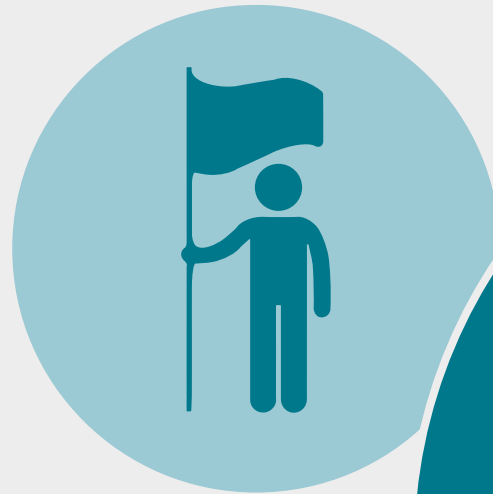
Key Knowledge, skills and behaviours

- + Communicates well with all stakeholders and fosters good working relationships
- + Understands the importance of utilising the whole practice team to ensure appropriate care provision and allow GPs to act as expert medical generalists
- + Actively participates in practice meetings
- + Communicates professionally and respectfully with all members of the team (internal and external) including patients

Working in a Supervisory/Leadership Role: Managing a Team

i) Office Managers and Assistant Practice Managers

ii) Practice Managers





Working in a Supervisory/Leadership Role: Managing a Team

Office Manager/Assistant Practice Manager

Development Framework – Overview



Broad sphere of responsibility/role

- + Provides assistance and support to the Practice Manager in creating a positive and patient focused culture for staff and patients
- + Manages junior staff & services, encouraging their participation in practice issues and values their contributions
- + Promotes a person-centric ethos within the team
- + Demonstrates and promotes resilience
- + Is tolerant and non-judgemental of others and supports a culture of valuing equality and diversity
- + Has an awareness of health inequalities and how to reduce these
- + Capitalises on the values, skills and knowledge of self and others
- + Initiates and sustains ethical, effective, inter-personal relationships based on trust, communication, listening and empathy
- + Drives a knowledge-sharing culture
- + Is open and transparent in communication
- + Embraces a user perspective and co-designs ways of working with patients and staff to help to achieve this, focussing on quality improvement



- + Works towards overcoming barriers to accessing care

Training and Development Opportunities

Early Career (Engaged Level)

- + Induction programme
- + Understanding Primary Care and the wider system training
- + Understanding the Essentials of Practice Management training
- + Peer Support
- + Mentoring Programme
- + Foundation Level Qualification – Supervisory Management in General Practice Programme (SCQF level 7)

Mid/Late Career (Established Level)

- + Refresher/update training
- + Scottish Practice Management Development Network (local and national)
- + Peer support
- + Coaching
- + Advanced Level Qualification – Practice Managers Vocational Training Scheme (SCQF level 9)
- + Mentor training



Working in a Supervisory/Leadership Role: Managing a team

Office Manager/Assistant Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Supervision and management of administrative teams, including elements of Human Resource (HR) management
- + Complaints liaison and management
- + IT/digital Leadership
- + Provides high level administrative support to the practice
- + Assists Practice Manager (PM) with premises management
- + Operational support of the work of the practice
- + Knowledge of national & local quality standards for General Practice
- + Contributes to Significant Event Analysis
- + Undertakes duties in relation to fire safety, health and safety and risk management
- + Undertakes delegated tasks and projects from PM
- + Delegates further where appropriate
- + May be involved in chairing meetings
- + Assists PM in updating and compiling policies and procedures
- + Contributes to practice strategy, formulates objectives and develops ideas for future practice development

Key Knowledge, skills and behaviours

- + Has excellent communication and interpersonal skills with multidisciplinary team
- + Has excellent organisational skills
- + Uses leadership skills to bring out the best in the team
- + Recognises people's needs for alternative forms of communication and responds accordingly
- + Works effectively with individuals and other agencies to meet service users needs
- + Effectively manages own time, workload and resources
- + Assesses own performance and takes accountability for own actions
- + Alerts other team members to any issues as appropriate in relation to quality & risk
- + Able to work autonomously and make decisions
- + Is reliable, flexible and adaptable
- + Is creative and innovative



Working in a Supervisory/Leadership Role: Managing a team

Office Manager/Assistant Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Promotes a person-centric ethos within the team.
- + Works with the Practice Manager to handle feedback & complaints effectively and ensure patient care is at the heart of decisions made
- + Strives to improve services to better meet the needs of patients
- + Leads on Care Navigation processes and ensures that whole team working is implemented and is working effectively.
- + Takes responsibility for coordination of procedures to safeguard confidentiality and ensures compliance with statutory regulations and other guidelines
- + Seeks feedback and uses it to drive improvements
- + Promotes equitable access and actively works towards removing barriers to accessing care
- + Is creative and innovative with new ideas in creating effective solutions to complex challenges.
- + Utilises digital inclusion to serve the needs of patients who do not speak English

Key Knowledge, skills and behaviours

- + May be responsible for setting up and running patient participation group and other patient/community engagement activities
- + Maintains appointment system and makes changes as necessary in discussion with the wider team
- + Assists in the management of practice public messaging including the practice website and other social media channels
- + Ensures that the practice complies with NHS contractual obligations in relation to patient care
- + Keeps up to date with wider National, Board and HSCP patient information and campaigns, and share through practice channels where appropriate



Working in a Supervisory/Leadership Role: Managing a team

Office Manager/Assistant Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Anticipates the need for sustainable change; making use of feedback to inform quality improvement and change
- + Coordinates process as directed by QI lead and may collaborate on improvement projects, reviewing and disseminating results
- + Will assist with training in Care Navigation, to allow for quality improvement for service users
- + Encourages patient feedback and uses it to drive improvements
- + Will actively take responsibility for appropriate service provision and may advise on appropriate provision and development
- + Under the guidance of the Practice Manager will initiate pathway mapping/design, reviews and evaluates effectiveness
- + Works closely with Practice Manager and Practice Nurse team to improve provision of long-term condition (LTC) management recalls and reviews

Key Knowledge, skills and behaviours

- + Assesses own performance and take accountability for own actions, either directly or under supervision
- + Will be actively involved in implementing and supervising areas of improvement projects
- + Takes a role in leading the team in promoting quality and continuous improvement
- + Contributes to improving access for patients, including managing change, developing new systems and procedures.
- + Assists Practice Manager in rolling out cluster quality improvement projects within the practice
- + Will assist Practice Manager in setting up and maintaining LTC management recall and review processes



Working in a Supervisory/Leadership Role: Managing a team

Office Manager/Assistant Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Monitors skill-mix and deployment of staff ensuring people are working to their strengths
- + Evaluates training & development needs of practice administration staff
- + Encourages staff engagement through motivating, caring for and supporting team members
- + Leads by example to encourage best practice and aid quality improvement
- + Is aware of individuals' personal needs and provides pastoral support to minimise any adverse organisational impact
- + Promotes understanding and confidence

Key Knowledge, skills and behaviours

- + Is skilled in giving feedback to boost confidence, enhance performance and influence outcomes
- + Ensures practice procedures comply with employment legislation
- + Will handle minor disciplinary/grievance incidents in accordance with procedure
- + Coordinates staff appraisal and personal development planning (PDP) process for non-clinical staff
- + Recognises and rewards excellence
- + Creates a climate of openness and continuous learning and development
- + Able to confidently and continuously challenge the 'status-quo' and effectively manage conflicting priorities in the workplace



Working in a Supervisory/Leadership Role: Managing a team

Office Manager/Assistant Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Identifies training and development opportunities for staff and shares with team members
- + Engages in professional development that demonstrates their commitment to career-long learning
- + Demonstrates ability and confidence in developing and supporting others to learn
- + Works with team to identify and address gaps in training
- + Ensures learning & and development are integral to improving service delivery
- + Ensures feedback measures are in place
- + Supports staff to value feedback and engage with improvement informed by patients' experiences

Key Knowledge, skills and behaviours

- + May assist in providing training in care navigation and other areas to admin team
- + Is committed to supporting learning and development
- + Recognises factors that influence learning
- + Recognises their own and others' learning styles
- + Accesses useful resources and signposts others to them
- + Documents and records all learning



Working in a Supervisory/Leadership Role: Managing a team

Office Manager/Assistant Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Co-ordinates meetings, keeps team informed and encourages input from others
- + Manages communications with external organisations, ensuring effective exchange of information
- + Builds and maintains relationships with other practices
- + Actively champions the fulfilment of the stakeholders needs within their team and the organisation as a whole and involves them in service improvement
- + Strives to create a culture where everyone contributes their ideas for quality improvement and innovation
- + Is willing to change the way they work by adopting new methods and processes
- + Engages with team in decision making

Key Knowledge, skills and behaviours

- + Has a sense of shared values, vision and purpose
- + Strives to build relationships between team members
- + Understands the importance of teams working together to develop joint values and vision
- + Takes a role in ensuring that multidisciplinary team working is effective at practice level
- + Represents the practice in developing relationships, identifying gaps and advising on remedial action



Working in a Supervisory/Leadership Role: Managing a Team

Practice Manager

Development Framework – Overview



Broad sphere of responsibility/role

- + Strives to develop a culture of caring for each other, partners and the service users
- + Has a knowledge of health inequalities and disparities and the affect these can have on the ability of people to access services and health care provision. Uses this knowledge to put systems in place to actively develop equitable provision of services for all those accessing the practice's services
- + Leads partnership working, focussed on whole-team working and collective outcomes for quality improvement
- + Understands and values the perspectives and contributions of others
- + Initiates and manages change. Looks for new and better ways of working
- + Has the confidence to make decisions and take appropriate actions in a timely manner, especially in conditions of uncertainty, ambiguity and resistance from others, while maintaining the respect and cooperation of others
- + Manages work, delivers results and remains contemporary within a defined operational context whilst maintaining high standards of professional conduct, competence and behaviour
- + Builds and sustains trust, commitment and engagement between those whom they manage
- + Provides structures and systems within which excellence can be delivered and service users will be safe

Training and Development Opportunities

Early Career (Engaged Level)

- + Induction programme
- + Understanding Primary Care and the wider system training
- + Understanding the Essentials of Practice Management training
- + Peer Support
- + Mentoring Programme
- + Peer Appraisal
- + Foundation Level Qualification – Supervisory Management in General Practice Programme (SCQF level 7),
- + Advanced Level Qualification – Practice Managers Vocational Training Scheme (SCQF level 9)

Mid/Late Career (Established Level)

- + Refresher/update training
- + Scottish Practice Management Development Network (local and national)
- + Peer support
- + Coaching
- + Advanced Level Qualification – Practice Managers Programme (SCQF level 10 or 11)
- + Mentor training
- + Educational Facilitator raining
- + Peer Appraiser training



Working in a Supervisory/Leadership Role: Managing a team

Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Leads on recruitment and retention. Focusses on individual, organisational and professional factors to aid the recruitment process and understands the importance of job satisfaction, feeling valued and role development in staff retention.
- + Uses an awareness of workforce planning, as contractual needs change and develop, to ensure that an appropriate skill mix is being provided in practice
- + Develops and maintains effective communication, both within the practice and with outside agencies
- + Manages practice finances and accounts and seeks to maximise income. Has an excellent understanding of practice funding and income streams and works towards minimising wastage in all areas
- + Recognises the importance of working alongside the clinical team to develop preventative and proactive care provision services to help the practice move away from an urgent care model and towards one of longer-term health promotion
- + Designs and shares the practice's strategic vision and values with the practice team, leads by example to embed these and make them the cornerstone of the organisational culture



Key Knowledge, skills and behaviours

- + Has the ability to use a wide variety of leadership and management skills to bring out the best in team members and to enable them to work together to achieve the aims of the practice
- + Highly motivated and able to motivate others
- + Works effectively with individuals and other agencies to meet service users needs
- + Uses knowledge of local demographics and deprivation levels to plan and provide appropriate care for the local population.
- + Works towards overcoming health inequalities by ensuring that services are planned and developed in need with the population's needs
- + Takes responsibility for own development, learning and performance
- + Effectively manages own time, workload and resources
- + Is aware of current health drivers and the changing face of healthcare provision



Working in a Supervisory/Leadership Role: Managing a team

Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Facilitates meetings, prepares agendas and distributes minutes as necessary
- + Develops practice protocols and procedures, reviews and updates as required
- + Ensures that the practice complies with contractual obligations
- + Routinely monitors and assesses practice performance against patient access and demand
- + Develops and implements an effective and responsive complaints management system
- + Uses leadership and management skills to create a practice culture focussed on the needs of service users
- + Seeks feedback from service users to improve and develop access to services
- + Understands the importance of involving the whole practice team in quality improvement processes
- + Promotes inclusive health practices which work towards promoting equity of access to health services for all service users according to their needs, thereby improving quality of life for all

Key Knowledge, skills and behaviours

- + Behaves in a manner that is welcoming to and of the individual, is non-judgemental and respects their feelings, circumstances, priorities and rights
- + Respects the privacy, dignity, needs and beliefs of patients, carers and colleagues
- + Identifies the risks involved in work activities and undertakes such activities in a way that manages those risks across the business
- + Ensures team members across the practice adhere to their individual responsibilities for infection control and health and safety
- + Keep abreast of changes in employment legislation
- + Works towards minimising health disparities by ensuring that the service users have access to services equitably



Working in a Supervisory/Leadership Role: Managing a team

Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Is focussed on improving the service users' experience and strives to support those using the service to make informed choices
- + Promotes a person-centric practice culture and encourages the whole practice team to work towards this goal
- + Is creative and innovative with new ideas in creating effective solutions to complex challenges
- + Responds to stakeholder feedback in an empathetic and sensitive professional manner and will view feedback and complaints as an opportunity for improvement
- + Anticipates the need for sustainable change
- + Provides training to the administrative team in care navigation to ensure that service users can access the multidisciplinary team at the appropriate time and to allow GPs to focus on their role as expert medical generalists

Key Knowledge, skills and behaviours

- + Ensures that the practice complies with NHS contractual obligations in relation to patient care
- + Oversees and/or develops and manages an effective appointments system
- + Reviews local population demographics to improve service provision
- + Keeps up to date with wider National, Board and HSCP patient information and campaigns, and share through practice channels where appropriate
- + Uses a wide variety of media to promote services to patients
- + Monitors and evaluates patient feedback
- + Routinely monitors and assesses practice performance against patient access and demand
- + Develops and implement an effective complaints management system
- + Liaises with Patient Participation Group and supports other patient/community engagement activities.



Working in a Supervisory/Leadership Role: Managing a team

Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Involves the whole practice team in development and improvement initiatives and promotes professional autonomy
- + Takes, or is willing to take, jobs and assignments that will prepare them for future advancement
- + Has the strength of purpose and the appropriate skills to facilitate change and to effectively persuade and influence buy in from the team and stakeholders
- + Will actively take responsibility for appropriate service provision and may advise on appropriate provision & development.
- + Initiates pathway mapping/design, reviews and evaluates effectiveness
- + Uses quality improvement tools to free up capacity and time by tackling constraints, delays, duplication and other problems in care processes and pathways.

Key Knowledge, skills and behaviours

- + Actively champions the fulfilment of the service users needs and the organisation as a whole and involves them in service quality improvement
- + Carries out regular performance reviews and appraisals for staff
- + Assesses own performance and take accountability for own actions
- + Provides protected quality improvement time for clinicians and encourages all staff to contribute
- + Initiates and leads on improvement projects
- + Will advise on strategies for integration of health and social care
- + Develops comprehensive plan for business recovery and continuity of service.



Working in a Supervisory/Leadership Role: Managing a team

Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Recognises the strengths of their team and competently assigns tasks to team members according to their capabilities and recognises and values their contribution
- + Sets clear targets and standards, ensuring processes are in place to support individuals in achieving these
- + Inspires others to perform by setting a good example and a willingness to extend themselves and be personally accountable for tasks to meet objectives
- + Commits to collect, filter and channel information in a consistent and transparent manner to ensure that team members are adequately informed
- + Leads on staff engagement through motivating, caring for and supporting team members
- + Will lead on implementing changes and projects developed through cluster working
- + Understands the importance of involving team members in managing change and the need to support them during this process

Key Knowledge, skills and behaviours

- + Leads through enabling with teaching and coaching when a new project is being introduced
- + Leads by persuasion by appealing to people's logic, emotions, and values. Understands the importance of showing people the benefits of a new way of working, such as enabling them to provide better patient care, create new services, or adopt a new role such as team leader which will help them adjust to the changes
- + Leads by example. Shows honesty and integrity in all they do to build trust and respect with colleagues
- + Uses a compassionate, collaborative and inclusive leadership approach to make the team stronger and enable individuals to perform to the best of their ability



Working in a Supervisory/Leadership Role: Managing a team

Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Drives the creation of a learning and development culture, inspiring and encouraging others to learn and grow throughout their working life, ensuring equality of opportunity for all
- + Has a comprehensive induction programme in place for new members of staff and prioritises the time and space needed to work through this
- + Encourages staff members to identify areas that they would like to develop and identify resources that will help them achieve this
- + Has a good knowledge of training providers and how to access appropriate training for different members of the team
- + Has a knowledge of different learning styles and uses this to plan training events in a way that can be accessed and understood by all members of the team

Key Knowledge, skills and behaviours

- + Leads by example. Shows a commitment to lifelong learning and conveys the benefits of this to the team
- + Actively seeks out appropriate training for team members and allocates protected time for this to be completed
- + Creates opportunities for whole practice meetings and planning of development pathways
- + Uses performance appraisals and personal development plans (PDPs) to identify learning needs which will improve knowledge and performance – has a timeline in place to ensure that goals are being met
- + Understands the benefits of both in-house training and external training to give a balanced, rounded and complimentary approach to learning



Working in a Supervisory/Leadership Role: Managing a team

Practice Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Is committed to enabling collaborative working practices and recognises the role of collaborative team working in minimising workforce stressors and the affect this can have on enhancing health outcomes
- + Completes their tasks to support group goals/objectives
- + Builds structures and maintains cooperative working relationships with others, listening to and valuing the input of others
- + Works closely with local cluster to ensure that Quality Improvement projects are understood and being implemented
- + Continues to develop a culture of caring for each other, partners and people who access their services
- + Fosters and promotes an environment of collaboration; focussing on and developing performance at all levels and across the multidisciplinary team
- + Establishes strong relationships with key Health and Social Care Partnership (HSPC) leads across the full range of integrated services

Key Knowledge, skills and behaviours

- + Represents the practice in developing relationships, identifying gaps and advising on remedial action
- + Builds and maintains partnerships and alliances
- + Will collaborate with other practices within local cluster group where appropriate to best serve practice population
- + Networks with other Practice Managers to identify areas for development to support best practice and high-quality care provision
- + Works closely with Practice Nurse team to review patient needs and service provision including long term condition management and to collaborate ways to enhance this service provision
- + Takes a lead role in ensuring that multidisciplinary team working is effective at practice level
- + Collaborates effectively in meetings and informal interactions and gives support to good decision making

Working in a Supervisory/Leadership Role: Managing a Team

i) Office Managers and Assistant Practice Managers

ii) Practice Managers





Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework – Overview



Broad sphere of responsibility/role

- + Involves and co-produces change through engaging communities in design, implementation and evaluation of practice-based health services
- + Utilises leadership and management skills to enable the practice to meet its agreed long term strategic aims and objectives within a profitable, efficient, safe and effective working environment and develops the practice to meet future business needs in a changing environment
- + Creates an organisational culture focussing on service users needs and involves the whole team in working towards this as a practice goal
- + Collaboratively agrees upon the strategic direction of the practice, formulates the strategic objectives and translates these into business and operational objectives; communicated to and understood by partners, staff and patients
- + Researches and develops ideas for future practice development and improvement, keeping abreast of issues/ changes in the internal, near and far business environment that might impinge on the practice and offering options for consideration by the partners and staff



Training and Development Opportunities

Early Career (Engaged Level)

- + Induction programme
- + Understanding Primary Care and the wider system training
- + Understanding the Essentials of Practice Management training
- + Understanding the Essentials of Strategic Management training
- + Peer Support
- + Mentoring Programme
- + Peer Appraisal
- + Foundation Level Qualification – Supervisory Management in General Practice Programme (SCQF level 7),
- + Advanced Level Qualification – Practice Managers Vocational Training Scheme (SCQF level 9)

Mid/Late Career (Established Level)

- + Refresher/update training
- + Scottish Practice Management Development Network (local and national)
- + Peer support
- + Coaching
- + Advanced Level Qualification – Practice Managers Programme (SCQF level 10 or 11)
- + Mentor training
- + Educational Facilitator training
- + Peer Appraiser training



Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Understands that service users in the local community that use the practice's health services are best placed to understand what they need, what is working and what could be improved
- + Focuses on co-production with the people who are using their services. This will involve consultation, inclusion, and collaboration
- + Understands that co-production works best when the people who use the services and their carers are valued by organisations as equal partners, can share the power and have influence over decisions made
- + Ensures that the practice complaints procedure is compliant with national requirements and that complaints are managed empathetically and effectively and treated as a service improvement tool
- + Keeps abreast of current affairs to be able to identify potential opportunities and threats
- + Establishes and maintains systems to maximise income, identify opportunities and ensure value for money. Manages and reports on the practice budget and finances, focussing on sustainability and financial resilience
- + Monitors and evaluates the performance of the practice team against objectives; identifies and manages change in a sensitive and inclusive manner

Key Knowledge, skills and behaviours

- + The manager will use quantitative feedback methods (e.g. service users surveys). This will provide insight into how the local community are experiencing current services at the practice and identify whether there are different experiences within the population leading to health inequalities
- + Qualitative methods such as group discussions and listening to service users stories will be used by to allow for more in-depth understanding of what matters to people and communities and what they need from their health services
- + This will form the basis of co-design and providing equitable services for all within the community
- + Matrix management skills will be utilised to maximise the performance of the full multi-disciplinary team, not just those employed by the practice and to help develop team inclusion and satisfaction within the individual's role
- + Will liaise with the practice accountant and partners/GPs to ensure finances are being maximised and to identify areas where improvements can be made



Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Develops innovative solutions and promotes quality improvement within and out with the statutory framework
- + Directs, leads, manages and is accountable for the planning and delivery of practice care services in collaboration alongside other members of the practice team, to ensure provision of high-quality care, relevant to the needs of the local population
- + Develops individual objectives and personal development plans for directly managed staff and creates a vision of personal continuous improvement for these staff
- + Seeks out the opinions and feedback of patients, clients, carers, staff, service users and other external organisations in the redesign of services as appropriate
- + Mentors and provides pastoral care and support to all practice staff as required
- + Responsible for setting the organisational culture, is adaptable and sensitive to others' needs and can utilise a range of communication skills to respond to individual's different ways of working
- + Ensures the practice is able to maximise the effective use of IT to aid services and communication

Key Knowledge, skills and behaviours

- + Monitors skill-mix and identifies practice staff training needs, through training needs analysis and matrix management – uses this knowledge to plan future employment needs and training programmes
- + Develops and delivers clear and thorough induction plans for all new staff
- + Responsible for a robust staff performance management system (e.g. appraisal) & ensures appropriate opportunities for mentoring
- + Leads and actively promotes whole team working and communication
- + Has a comprehensive business continuity plan in place and ensures that this is updated regularly and that all members of the management team are aware of what this includes and how to access in an emergency
- + Ensures that the privacy, dignity, needs and beliefs of patients, carers and colleagues are respected at all times
- + Works effectively with individuals and other agencies to meet service users' needs
- + Develops strategies to ensure quality and risk reduction
- + Ensures there are robust clinical governance structures in place



Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Is creative and innovative with new ideas and experimentation in creating effective solutions to complex challenges, always promoting a public service culture
- + Designs services in such a way that ensures the practice is working towards addressing health disparities and health inequalities through engagement with the community
- + Analyses local demographics and deprivation levels to shape current and future planning
- + Promotes a person centric ethos and practice wide service user centred organisational culture
- + Leads the on-going development of clinical practice and standards of care within the service, including the development of policies, procedures, protocols and guidelines in collaboration with multidisciplinary colleagues
- + Proactively seeks patient feedback to increase satisfaction, investigates and responds to feedback and complaints, including taking responsibility for all written complaints and utilises these to promote a learning and development opportunity and overall service improvement

Key Knowledge, skills and behaviours

- + Focuses on improving the health of those with the poorest health outcomes. Uses actions that are evidence-based, outcomes-orientated, systematically applied and appropriately resourced
- + Recognises patient's needs for alternative methods of communication, encourages this and provides resources in a variety of ways to ensure equality and inclusivity
- + Adopts a strategic approach to the development and management of patient services
- + Monitors and assesses demographics to ensure that services are in line with the communities needs
- + Sensitive and empathetic in all situations
- + Has excellent interpersonal skills
- + Is flexible and cooperative
- + Is confident in networking and building relationships



Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

Working in a Strategic Leadership Role

- + Champions partnership working. Recognises the benefits and challenges of whole team working
- + Involves the whole practice team in development and improvement and promotes professional autonomy
- + Takes responsibility and is accountable for their decisions and actions, at a strategic and operational level, and is prepared to be held to account for what they have agreed to deliver
- + Inspires others to perform by setting a good example and a willingness to extend themselves and be personally accountable for tasks to meet objectives
- + Ensures processes are in place to review and learn from significant events and incidents
- + Maintains up to date knowledge on Infection Control Procedures and supports implementation of National Infection Prevention & Control Manual (NIPCM) guidelines
- + Monitors changing needs and liaises with/communicates plan to relevant stakeholders with regards to business continuity planning
- + Provides appropriate training and the practice protocol on whistleblowing

Key Knowledge, skills and behaviours

- + Leads and actively participates in service quality initiatives
- + Contributes to practice strategy; formulates objectives and research and develops ideas for future practice development
- + Advises the practice on principles of pathway design and facilitate processes
- + Ensures arrangements are in place to report to NHS Board in line with contract reporting requirements
- + Ensures cluster arrangements and practice changes are supported
- + Demonstrates clear management accountability and follows clinical governance arrangements
- + Advises on business continuity planning process and facilitates appropriate training
- + Identifies priority improvements from both quantitative and qualitative analytical information, using that information about the impact of improvement activity to inform future interventions and approaches
- + Ensures compliance with infection control guidance in line with NIPCM guidelines



Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Leads, directs and manages individual team members with practice role requirements including timescales and priorities to ensure overall objectives are met
- + Enables leadership at all levels
- + Promotes professional autonomy
- + Is skilled in giving feedback to staff to enhance performance, boost confidence and influence outcomes
- + Takes responsibility and is accountable for their decisions and actions, at a strategic and operational level, and is prepared to be held to account for what they have agreed to deliver
- + Effectively leads others and demonstrates adaptive leadership skills to achieve this
- + Recognises the strengths of their team and competently delegates tasks to team members according to their capacities and capabilities and recognises and values their contribution
- + Acts with integrity and delivers on promises

Key Knowledge, skills and behaviours

- + Supports a culture of sharing information, knowledge, and reflective practice
- + Uses leadership skills to give staff purpose, inspiration and direction
- + Ensures that the practice has a strategic vision and includes the whole team in identifying this and working towards this
- + Understands themselves, the organisation and the environment in which they are working
- + Encourages whole team involvement and innovative thinking debate by holding “safe zone” meetings where open dialogue and ideas are expected and welcomed
- + Knows the members of their team. Takes time to understand how team members work and uses this knowledge to allow them to work to the best of their ability
- + Handles conflict situations, quickly, effectively and focusses on maintaining the relationship where possible



Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Prioritises learning new skills and abilities to develop new or improved knowledge and shares this
- + Seeks out and learns from mentors and subject experts within and outwith the organisation to improve own leadership
- + Drives the creation of a learning and development culture, inspiring and encouraging others to learn and grow throughout their working life, ensuring equality of opportunity
- + Develops a culture of lifelong learning within the practice team
- + Has an awareness of appropriate resources available to support the development of team members and signposts staff to these
- + Focuses on identifying and growing talent to fill leadership and business critical positions in the future to aid with succession planning
- + Promotes a 'Growth Mindset' whereby team members realise that their abilities and talents can be developed through effort, perseverance and drive leading to increased staff engagement and empowerment
- + Ensures that there are career pathways in place to allow team members to develop in their roles and lead to increased staff retention and job satisfaction

Key Knowledge, skills and behaviours

- + Advises on continuing professional development (CPD) for all personnel in line with local and national policy requirements
- + Maintains training registers for staff to ensure that mandatory training is up to date and arranges for regular training updates
- + Uses performance management (e.g. appraisal) and personal development plans to identify areas for learning and actively seeks out relevant, role specific training
- + Identifies the needs for practice staff training, including facilitation, organisation and delivering practice staff training events to ensure that they meet the needs of all practice staff across the practice



Working in a Strategic Leadership Role

Strategic Practice Manager, Business Manager

Development Framework



Examples of sphere of responsibility/role within own practice area:

- + Initiates and sustains ethical, effective, inter-personal relationships based on trust, communication, listening and empathy
- + Encourages and demonstrates open and honest communication and deals with issues and problems as they arise, ensuring diplomacy and conflict resolution
- + Is tolerant and non-judgemental and supports a culture of valuing equality and diversity
- + Is emotionally intelligent and can understand the intent, concerns, feelings, and behaviours of others, even when not clearly expressed
- + Promotes team working, builds rapport and collaborative working practices with the multidisciplinary team. Liaises with other departments and personnel across organisational and professional groups. Ensures effective communication and interpersonal skills with other disciplines and organisations
- + Establishes strong relationships with key Health and Social Care Partnership (HSCP) leads across the full range of integrated services
- + Ensure links to HSCP/Board colleagues for interface issues which cannot be resolved at practice level
- + Communicates with an extensive range of internal and external project stakeholders at strategic and operational

levels and on a one-to-one basis to ensure that the vision of the practice is communicated with all stakeholders and that the requirements of all involved are understood and communicated

- + Negotiates with and influences clinical and administrative staff at all levels, where necessary, challenge assumptions and “norms” to ensure that any service redesign meets clinical and non-clinical service requirements

Key Knowledge, skills and behaviours

- + Develops and maintains effective communication both within the practice and with outside agencies
- + Works effectively with individuals in other agencies to meet patients’ needs
- + Implements cluster quality improvement programmes and provides feedback on progress
- + Builds structures and maintains cooperative working relationships, listening to and valuing the input of others
- + Takes the lead role in ensuring that multidisciplinary team working is effective at practice level
- + Advises on strategies for integration of health and social care, in collaboration with HSCP
- + Maintains relationships and up to date knowledge of the wider Board and HSCP strategic context and developments
- + Ensures links and communication with HSCPs in relation to wider business continuity arrangements

Finding a Way Through

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**.



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