

## CASE STUDY

### *Betsi Cadwaladr University Health Board*

#### **A Competence Based Approach to Developing Administration Capacity to Support Locality Working**

##### **Background :**

Following the introduction of Locality working, administration staff needed to be able to work differently to provide a more flexible and responsive service to the locality teams.

Localities have a population of between about 30,000 and 50,000 people. Which is felt by the Welsh Government to be the ideal population size for health, social care and community services to work together effectively to support residents.

Each locality has a multi-agency Locality Leadership Team which looks at how community based services can work together to respond to the needs of local residents with the overall aim of trying to keep people closer to home for longer and prevent, where appropriate, unnecessary hospital admissions.

Prior to the introduction of localities the administration team worked and was managed by the community hospital or community clinic in which they were based.

They were managed differently, often had different roles and were not able to cover in other hospitals or clinics as the work practices were different in each area. The staff did not communicate between community hospital or community clinics and worked in silos. They developed processes to suit local need but with no transferability across the locality.

To undertake role re-design it is essential to work in partnership with existing staff to define the competence profile of the staff required to deliver the service. The competence profile of staff is the knowledge, understanding, values and performance required to safely deliver a service or aspect of care to service users. Using National Occupational Standards to scope the competence profiles of staff can assist in understanding:

- The needs of the patient/service
- The tasks or functions required to meet those needs

We worked with the locality teams at each band, and through facilitated workshops we supported them to consider what was good, could be improved, was challenging and what their service users liked about the way in which their administration service was currently operating. We then used this evidence to support the teams from across several community hospitals and clinics to consider how they could use the good practice and replicate this across the locality. Challenging the staff about the

service they provide and the way in which they provide it then allows us to consider what the skills and competencies are required for a role that supports the flexibility of working at all sites. Scoping out these roles using Occupational Standards in partnership with staff allows for staff a greater understanding of the skills and competence they need to carry out a role competently.

As a result of the work we were able to produce defined role profiles for staff at level 2, level 3 and level 4 of the NHS career frameworks that detailed the National Occupational Standards required for their role, the education required for the role and defined the scope of practice for the role.

Following the work, there has been an improvement in staff understanding of what working in a locality means, communication is more effective, covering leave is easier and some of the staff have found that they have been able to develop new skills which has helped improve their confidence and achieve career progression.

**Betsi Cadwaladr University Health Board (BCUHB)** provides health care across the whole of North Wales. The organisation employs over 16,100 staff.

### **Use of National occupational standards:**

BCUHB have used a variety of NOS frameworks to develop our workforce including

- Business Administration
- Customer Service
- Clinical Health Skills
- Health and Social Care
- Mental Health Adults

They are useful for:

- **Managers** – National Occupational Standards provide a template of competences that staff need for their role. The National Occupational standards provide a framework to assess staff competence against, therefore ensuring delegation of clinical and non clinical tasks can be safely managed.
- **Assessors** – National Occupational Standards provide a framework for assessment of staff competence
- **Education providers** – Working with employers, education providers can develop bespoke training packages. National Occupational Standards provide a framework for the development, thereby ensuring that education meets the needs of the workforce.
- **Staff** – National Occupational Standards are useful a useful tool for self-assessment and a means of recognising and describing personal achievements. They form the basis for continuing professional development.
- **Teams** – undertaking a team assessment using National Occupational Standards can develop an understanding of the gaps in skills and knowledge and support the understanding of how teams can be developed to meet service need.

**For what purpose?**

We use National Occupational Standards to develop an understanding of the requirements of a new, changed or expanded role. We have worked in partnership with services and staff to develop competence profiles for the workforce that support an efficient patient journey, by ensuring that the right staff with the right skills and competence are able to undertake their role safely and competently.

Using National Occupational Standards provides the Health Board with an evidence base and the measurable competence frameworks can be used to address areas of change and supports efficient staff education. Using National Occupational Standards provides an assurance framework that staff are safe and competence to undertake the role extensions that have been developed.

An outcome of the competence framework developments is that we are able to work with education providers to develop specific packages of learning that meet the needs of the service and support the progression of the workforce. Developing bite sized learning packages linked to competence assures the Health Board that education is fit for purpose and fit for the development of staff within our services.

### **Testimony from users:**

*'The use of National Occupational Standards helped provide staff with clear understanding of what was expected of them in their roles and highlighted future training needs. The standards provided us with a framework which linked staff development with service needs.'* Laura Vernon, deputy Operational Manager

### **Benefits**

- Patients benefit through the Health Board ensuring that it has the staff with the right skills and competence to deliver their care
- Staff benefit by having a clear understanding of what is expected in their role. The National Occupational Standards support staff to understand the knowledge and performance as well as the values required for their role.
- Staff benefit by developing increased confidence in their clinical practice
- The specific service area benefits through having competent and confident staff
- Competence are transferable and so the wider organisation benefits by being able to replicate good practice across several service areas

### **The future**

We will continue to use a competence based approach to role redesign in our services as it is an approach that

- puts the patients/service user at the centre of service change and supports the following:
- develops a service or workforce built around the patient and service user needs
- involves staff and encouraged engagement from the outset, unlocking the knowledge and expertise within the service

- Develops a workforce who have the appropriate skills to deliver the right service, in the right place at the right time and cost
- Enables the service to better identify and influence the workforce training and education requirements from education providers
- Promotes integrated planning taking into account, service, workforce and financial aspects, by clearly identifying the service requirements, the associated competence and the staff required to safely undertake the function.

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