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Monday 11 September 2023

Dear Colleagues,

## **PUBLICATION OF THE CORE COMPETENCY FRAMEWORK FOR GENERAL PRACTICE MANAGERS AND ADMINISTRATION STAFF and MENU FOR LEARNING**

I am delighted to write to you today to share the '[General Practice Managers and Administrative Staff Core Competency Framework 2023](#)' which has been commissioned by Scottish Government and developed by NHS Education for Scotland (NES). This work has been co-produced with our key stakeholders through the Developing Practice Managers and Admin Staff Roles Group, with representation including colleagues within the British Medical Association and the Royal College of General Practitioners.

For your awareness, Terms of Reference (ToR) and Membership of the group are in **Appendix 1**. The aim of the group was “to scope the current practice manager and administrative staff roles and identify areas for developing a refreshed and refocused professional role”.

I am hugely grateful to Fiona Duff, Senior Adviser to the Scottish Government Primary Care Directorate, for her longstanding and wholehearted commitment and expertise in this area of general practice, all central to developing this work, and in particular for her recent Chairing of this group.

I would strongly encourage you to consider and review the Framework within your practices; to assess how you could adopt and apply these competencies; and to make full use of the NES support on offer including the TURAS website.

The Scottish Government recognises fully that the role of Practice Managers and Practice Administrative Staff (Receptionists etc.) is not always appreciated or understood. Following the publication of the [2018 General Medical Services Contract in Scotland](#), which noted that “there will be a new enhanced roles for practice managers and practice receptionists”, it has long been our aim to raise the profile, status, professionalism, learning and development of Practice Managers and Admin Staff. We began this work in January 2020, and despite being paused due to the pandemic, it was restarted in June 2022.

The 2018 Contract also said:

“Practice Managers play a key role ensuring the smooth and efficient day to day running of practices and the long term strategic management and co-ordination of primary care, including support the development of the multi-disciplinary team.”

“The role of the primary care manager was introduced in the 1980s as a senior receptionist/ office manager role. With the introduction of the Red Book contract in 1990, which coincided with the introduction of the first IT systems into general practice including automated call and recall systems and electronic appointment systems, the role began to evolve and become more commonplace.”

“The 2004 GMS Contract formally recognised the contribution effective practice management has on reducing the administrative burden on clinical staff and included a core competency framework for practice management.”

“The introduction of the 2018 contract will increase the need for highly skilled practice managers with wide ranging, adaptable and versatile skills. In addition to continuing to manage the practice employed team, they will work more with the wider primary care system including GP clusters, NHS Boards, HSCPs, and emerging new services.”

Alongside the changing role of Practice Managers, the roles of receptionists and other administrative staff in the practice has evolved. Practice receptionists have an important role supporting patients and enabling practices to run smoothly”

“Strong leadership by Practice Managers supported by their teams, and by the Practice GPs will be hugely important to the success of the proposed new contract and new ways of working”

Five years on, the role of Practice Managers and Administrative Staff has changed even more than expected. The changes in the way that General Practice had to work during the COVID-19 pandemic, the introduction of the much wider multi-disciplinary team, who are often working both in and with practices but are employed by the Health Board or Health and Social Care Partnership, developments in digital technology, changes in infection prevention control measures, as well as the increased need and demand from the public are just some of the challenges and issues which staff have had to contend with.

The Core Competency Framework supports the development of 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.

It should be used as part of the 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 all Managers with a resource to help their teams grow and develop in skills and competence.

The Framework has been developed for three key roles in General Practice today:

1. Those staff working under varying levels of supervision by a team lead e.g. **Medical Receptionists, Care Navigators, Secretaries, Dispensers** etc.
2. Those staff working in a Leadership role, managing a team e.g. **Office Managers, Assistant Practice Managers, Practice Managers.**
3. Those staff working in a Strategic Leadership Role e.g. **Strategic Practice Manager, Business Manager.**

The Six Dimensions of practice are:

- i. Core Skills;
- ii. Person Centred;
- iii. Quality Improvement;
- iv. Leadership;
- v. Facilitation of Learning;
- vi. Collaborative Working.

The Framework should be read alongside the interactive Menu for Learning which includes a Learning Needs Analysis tool and links to nationally available training and education resources. The Menu for Learning is a live resource, which will be continually updated and refreshed.

We wish to note that financial remuneration for this group of staff was out with the scope of the Developing Roles Group and therefore we have not included any indicative equivalent Agenda for Change bandings for these roles. The majority of General Practice Managers and Administrative Staff are employed by a General Practice (independent contractor), with the exception of Health Board run ('2C') practices, where staff are employed by the NHS. As independent contractors, it is up to each General Practice and the Partners within that practice to ensure that their staff have the appropriate skills and training to carry out their role and to determine what is the appropriate remuneration for that role, compared with other local market forces. It is important that staff feel valued and appreciated, and this is not possible where there are large variations in remuneration across the system.

We also recognise that the public do not always understand the role of Practice Staff, particularly the role of Practice Receptionists and Care Navigators. The [Receptionist Marketing Campaign](#), which describes the Care Navigator role, is still available and we would encourage you to continue to utilise this resource locally, as well as other opportunities to support the public to understand how General Practice and Primary Care works today.

I would like to take this opportunity to thank our colleagues in NHS Education for Scotland (NES) and particularly Tracey Crickett and her team in the National Scottish Practice Management Development Network, for the huge amount of work they have done in developing the Framework and Menu for Learning. They are also continuing work on developing and delivering training for Practice Managers, and going forward, Administrative Staff. I would encourage you to look out for their weekly newsletters with information about new developments and upcoming courses.

Finally, I would like to take the opportunity to thank you to you and your teams in General Practice for everything that you do on a day-to-day basis to provide care to the people of

Scotland. I do appreciate that pressures remain in practices and that teams are incredibly busy. Nevertheless I hope you find these new resources helpful and supportive and are able to identify opportunities for their use. We would welcome any comments and feedback on them.

Yours sincerely,



**Louise Feenie**

Sustainability and Health Inequalities Unit Head

General Practice Policy Division, Primary Care Directorate, Scottish Government

## DEVELOPING PRACTICE MANAGERS AND ADMIN STAFF ROLES GROUP – TERMS OF REFERENCE and MEMBERSHIP

<b>Remit and Terms of Reference</b> <b>Developing Practice Managers and Administrative Staff Roles Group</b>	
<b>1. Name of group:</b>	<b>Developing Practice Managers and Administrative Staff Roles Group</b>
<b>2. Accountable to:</b>	<p>The <b>Developing Practice Managers and Administrative staff roles Group</b> will report to General Practice Policy Division, Primary Care Directorate, Scottish Government</p> <p>Governance of the <b>Developing Practice Managers and Administrative staff roles Group</b> falls under the General Practice Policy Division, Primary Care Directorate and the Scottish Practice Management Development Network, NHS Education for Scotland (NES).</p>
<b>3. Remit</b>	<p><u>Aims and Purpose</u></p> <p>The role of the <b>Developing Practice Managers and Administrative Staff Roles Group</b> is to support the development of a re-focused Practice Managers and administrative staff roles within Scotland's General Practices.</p> <p>The overall aim of the <b>Developing Practice Managers and Administrative Staff Roles Group</b> is to scope the current <b>Practice Manager and administrative staff</b> roles across NHS Scotland Boards/ HSCPs and identify areas for developing a refreshed and refocused professional role.</p> <p>Identify future training requirements for <b>Practice Managers and Administrative staff</b>, current educational provision and identify any gaps to support the proposed refreshed role.</p> <p>Have cognisance of the Scottish General Medical Services Contract, impact of the Covid 19 pandemic and the potential for the Practice Managers and administrative staff roles to evolve further.</p>
<b>4. Terms of Reference (scope)</b>	<p><u>Objectives and Responsibilities</u></p> <p><u>Part 1</u></p> <p><u>Commission NES to undertake a</u></p>

	<ul style="list-style-type: none"> <li>• Training needs analysis</li> <li>• Service Needs Analysis</li> </ul> <p><b>Part 2</b> Work to refresh the role and educational requirements of Practice Managers and Administrative Staff</p> <p>Profile current Practice Manager and Administrative Staff workforce:</p> <ul style="list-style-type: none"> <li>• Scope current education programmes</li> <li>• Identify future role of the Practice Manager and administrative staff; within general practice and GP clusters</li> <li>• Provide a career pathway that supports the profession to aid the transformation of primary care.</li> <li>• Identify appropriate Job Titles and underpinning education needs and provision needs.</li> </ul> <p>Gain evidence based knowledge around this work.</p> <p><b>Part 3</b> Wider implementation across the system.</p> <p><u>General</u> This work will be done by:</p> <ul style="list-style-type: none"> <li>• Informing and influencing the development, policy and best practice</li> <li>• Ensuring effective two-way communication;</li> <li>• members of the <b>Developing Practice Managers and Administrative Staff roles Group</b> representing their respective organisations should, seek views of their organisations/members when requested and to ensure communication of the outcomes of these meetings to their respective organisations/members.</li> </ul>
<p><b>5. Groups feeding into the Transforming Practice Managers and Administrative Staff roles Group</b></p>	<p>Sub-Groups may be formed where appropriate to take forward specific work plans. The sub groups will report to the <b>Developing Practice Managers and Administrative Staff roles Group</b>.</p>
<p><b>6. Group Membership</b></p>	<p><b>Chair of the Group</b></p> <p>The <b>Developing Practice Managers and Administrative Staff roles Group</b> will be chaired Fiona Duff, Senior Advisor, Primary Care Directorate, Scottish Government.</p>

	<p><u>Members</u></p> <p>Tracey Crickett <a href="mailto:Tracey.Crickett@nes.scot.nhs.uk">Tracey.Crickett@nes.scot.nhs.uk</a>  NES National Coordinator for Scottish Practice Management Development Network (SPMDN)  NHS Education for Scotland</p> <p>NES Program Officers (Practice Management) – Vicki Clark and Kirsty Maciver, Sari Lievonon, Sharon McGowan</p> <p>NES Practice Manager Local Co-ordinators and Educational Facilitators - Jan McCulloch, Pauline Hutton, Pauline Young Campbell Watt</p> <p>Practice Manager - Stephen Reid</p> <p>New Practice manager – Lindsay Brynes</p> <p>Receptionist rep - Vacant</p> <p>Other NES reps:  GPN – Vicki Waqa,  Business and Administration (as required)  Workforce - Allison Hall</p> <p>BMA, SGPC – Dr Teresa Cannavina)</p> <p>RCGP – Dr David Shackles</p> <p>Healthcare Improvement Scotland – April Masson</p> <p>NHS24 – Arlene Campbell</p> <p>Other special Boards (as and when required)</p> <p>PC Leads Rep  Clinical – Vacant  Management – Linda Bunney, NHS Dumfries &amp; Galloway</p> <p>HSCP/ CO special interest group rep – Lorna Kelly</p> <p>Union rep eg Unison (TBC if required)</p> <p>SG Policy rep – Louise Feenie, Nick Smith and Chris Bain, Caitlin Byrne</p> <p>GPN/ CNOD Rep – Kathy Kenmuir</p> <p>Patient Representative: Chris Corkish</p>
<p><b>7. Quorum:</b></p>	<p>The quorum of the group will consist of, at least 12 members of the Developing Practice Managers and Administrative Staff roles Group.</p>

<p><b>8. Frequency of meetings, papers and minutes</b></p>	<p>The <b>Developing Practice Managers and Administrative Staff roles Group</b> will meet approximately every quarter .</p> <p>Circulation/distribution lists for meeting details, agendas, papers and action points will be sent to <b>Developing Practice Managers and Administrative Staff roles Group</b> members.</p> <p><b>Papers will contain a glossary of terms.</b></p>
<p><b>9. Secretariat support and expenses:</b></p>	<p><u>Secretariat Support</u></p> <p>Provided by NHS Education for Scotland , SPMDN team</p> <p><u>Expenses</u></p> <p><b>Developing Practice Managers and Administrative Staff roles Group</b> members from partnership networks and non-NHS Boards attending meetings can be provided with expenses forms from NES.</p>
<p><b>10. Review Date:</b></p>	<p>The terms of reference and membership will be reviewed after six months. The work of the <b>Developing Practice Managers and Administrative Staff roles Group</b> is expected to span twelve months initially.</p>
<p><b>11. Conflict of interest</b></p>	<p>All members and those asked to comment on work produced by the Group will be asked to declare any conflicts of interest. Any action to be taken on the basis of these declarations will be at the discretion of the Chair.</p>
<p><b>12. Confidentiality</b></p>	<p>Records of meetings and the discussions held, decisions and recommendations made, will be kept on file by the Scottish Government and held in their electronic filing storage system in line with their normal policies. This information can be made available to the public and other interested parties in line with current legislation.</p> <p>The membership may from time to time be asked to consider, discuss or review material that, for reasons such as commercial confidentiality, is required to remain confidential. Members will be clearly notified where material is of this nature and will, by virtue of their membership of the Group and agreement to these terms of reference, agree to keep such material confidential.</p>

Date: September 2022  
Updated: August 2023

