Appendix 6

Transferable Role Template

Career Framework Level 4

Liaison and Diversion Service Senior Administrator

Final - April 2018

Developed with the Liaison and Diversion Expert Panel

Contents

Introduction to the Template

Transferable Roles

This template is designed to enable a common understanding and communication of transferable roles.
It can be used to help define the learning and development needs for staff already working in these roles and to support the establishment of transferable roles where appropriate.

In the development of this template Skills for Health seeks to provide some consistency of approach to defining the skills and competences needed to fulfil the requirements new, hybrid, or existing transferable roles.

All transferable roles will have common or 'core' competences, plus speciality/pathway specific competences. Over time, these will be supported by appropriate national occupational standard based learning and development packages. The term 'competences' is used throughout the document. All competences are national occupational standards (NOS).

Definition of a Transferable Role

A transferable role (TR) is a named cluster of competences and related activities that is applicable, relevant and replicable across different geographic locations in the UK. A TR may be either a whole job levelled to the Career Framework e.g. advanced orthopaedic practitioner or a subset of various jobs at different levels of the Career Framework, e.g. point of care testing.

The Template

The template has a range of applications and may successfully be used by commissioners, managers, employers, and individual staff members.

In all cases the template is designed to be used as a whole. A role is composed of all components – level descriptors, national occupational standards and indicative learning and development.

Career Framework Levels and National Occupational Standards (NOS)

The Career framework, which has nine levels, is a method of describing the level of autonomy and responsibility and the kind of decision making required by a job. Level descriptors have been established through rigorous discussions and are referenced to and linked with the qualifications frameworks as well as research where available regarding what should be expected of an individual at any given level. The level descriptor is intended to be relevant to any role within the health sector both clinical and non-clinical roles.

It is important to bear in mind that the career framework levels are not intended to be coterminous with the NHS Agenda for Change banding, though there may be some similarities.

National Occupational Standards have been developed by expert groups, have undergone a rigorous nationally determined process to achieve their status and are approved for use in vocational qualifications by the UK Commission for Employment and Skills. Because of this they cannot changed in terms of content or wording. They focus on what a person needs to be able to do, as well as what they must know and understand to work effectively. They are not in themselves levelled. Some may be more appropriate to a specific level on the career framework others will span all levels. They are all indicatively linked to the NHS Knowledge and Skills Framework.

The reference function they are listed by in the template relates to the Health Functional Map which is a method of categorising the NOS and amongst other things facilitates finding them on the data base.

Each NOS is listed by its code and title, they are all underpinned by knowledge requirements and performance criteria.

The NOS in this template are divided into the following sections:

- Core to the level – the core is intended to be relevant to any role in the health sector, whether it is clinical or not and therefore is broad based in terms of the NOS it contains.
- Specific to the role
- Facets, some roles have different facets, each made up of a group of NOS, relevant to different areas of practice
- Locality Specific – Additional NOS may be added here.
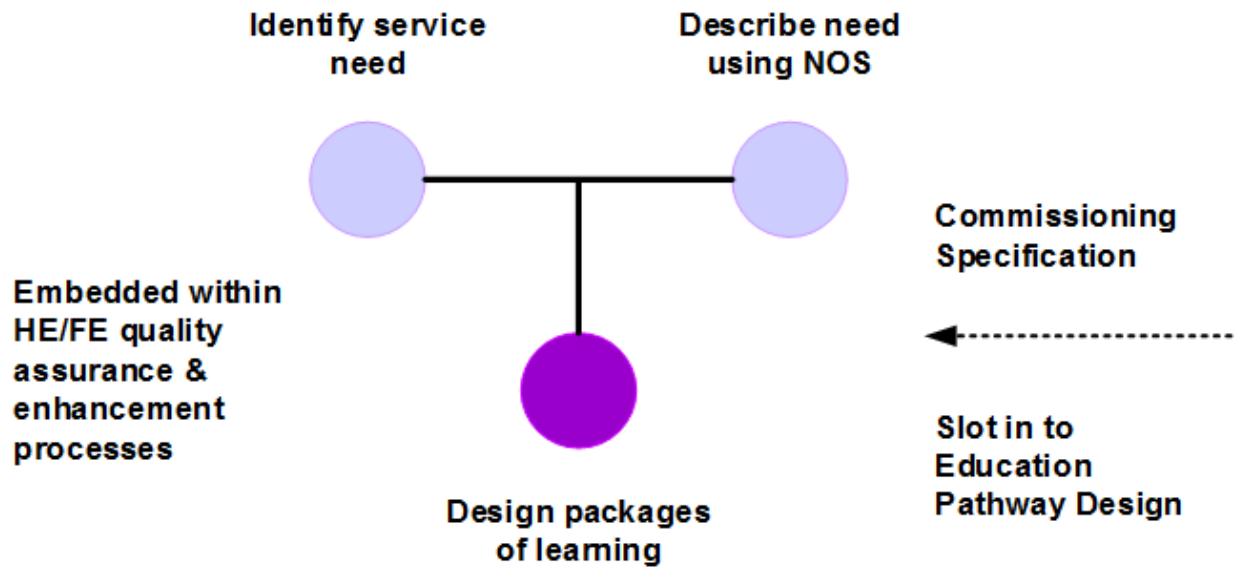
Indicative Learning and Development

The learning and development section of the template gives an indication of the level and style of learning relevant to the role. It is very much an indication and is not a comprehensive inventory of learning available.

Some people may wish to or need to study whole qualifications - others will not. Some will need to participate in smaller 'bite sized' learning opportunities. Each individual should use the role profile to identify with their line manager what their needs are and how they will achieve them.

Learning should follow the Skills for Health learning design principles which encourage partnership working between employers, commissioners and education providers. The learning design principles aim to develop learning that is fit for purpose, practice and award. The key messages are:

- Learning should be based on NOS
- Learning should be accredited and quality assured
- Flexible frameworks and delivery methods should be used
- Bite sized packages of learning that build into larger qualification enable greater flexibility

Skills for Health Learning and Design Principles

**Identify service
need**

**Describe need
using NOS**

**Commissioning
Specification**

**Embedded within
HE/FE quality
assurance &
enhancement
processes**

**Slot in to
Education
Pathway Design**

**Design packages
of learning**

The level of learning required by an individual will be dependent upon what they need to learn. There is a connection between levels of learning and career framework levels however not all learning will be at the same level as the role level. For example someone with expert clinical skills i.e. level 8 may need to engage in learning about management at level 5 or 6 of the qualifications framework. Learning for a practical skill may not be levelled.
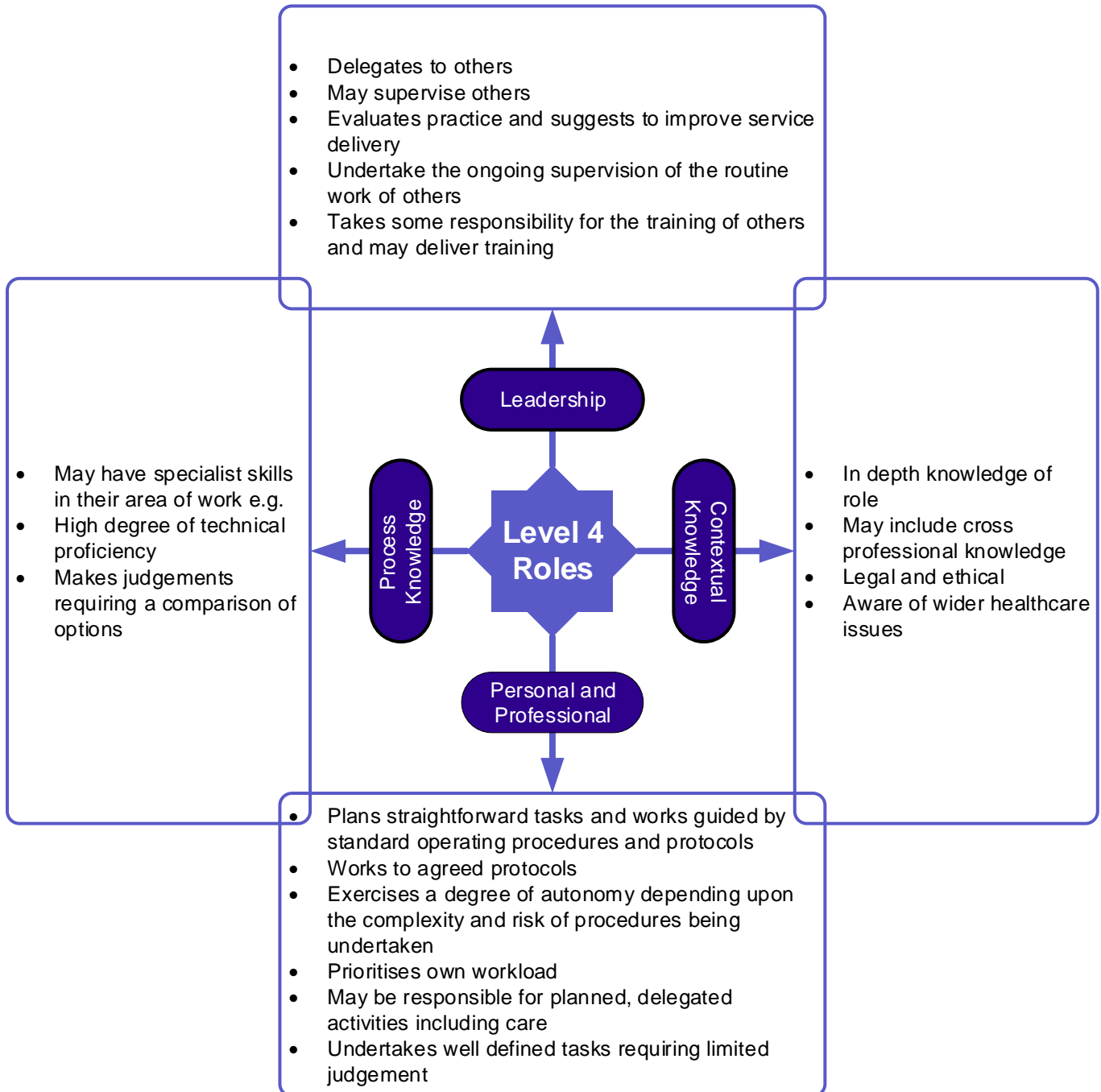
At all times learning should be tailored to the needs of the service and the individual. A flexible approach to learning is required in terms of curriculum design and the use of informal learning opportunities. More detail is included in the indicative learning and development section of this template.

The Template

Level Descriptors

Definition of the Level 4 Role

People at level 4 require factual and theoretical knowledge in broad contexts within a field of work. Work is guided by standard operating procedures, protocols or systems of work, but the worker makes judgements, plans activities, contributes to service development and demonstrates self-development. They may have responsibility for supervision of some staff.

- Delegates to others
- May supervise others
- Evaluates practice and suggests to improve service delivery
- Undertake the ongoing supervision of the routine work of others
- Takes some responsibility for the training of others and may deliver training

Leadership

- May have specialist skills in their area of work e.g.
- High degree of technical proficiency
- Makes judgements requiring a comparison of options

Process Knowledge

Level 4 Roles

Contextual Knowledge

- In depth knowledge of role
- May include cross professional knowledge
- Legal and ethical
- Aware of wider healthcare issues

Personal and Professional

- Plans straightforward tasks and works guided by standard operating procedures and protocols
- Works to agreed protocols
- Exercises a degree of autonomy depending upon the complexity and risk of procedures being undertaken
- Prioritises own workload
- May be responsible for planned, delegated activities including care
- Undertakes well defined tasks requiring limited judgement

The National Occupational Standards

This section of the template has an example of a level 4 role. This example is intended to give core information for the role. The indicative learning and development packages are included.

Basic Information

Named Role	Liaison and Diversion Service Senior Administrator
Area of Work	Liaison and Diversion Service
Sample Job Description Available	No
Experience Required	Previous administrative experience. Level 3 Diploma in Business Administration or equivalent is desirable but not essential
Career Framework Level	Level 4

Scope of the Role

The role is responsible for front and back office functions for the service and will support effective team working within the Liaison & Diversion Service by ensuring that information flows across the team on a daily basis. Collate and produce information that allows the service to undertake analysis, evaluation and improve continuously service delivery.

Provide high quality administrative support to the Liaison and Diversion team. Ensure clients and visitors to the service are dealt with in a friendly, professional and confidential manner. Help to contribute to individuals having a positive experience of the Liaison and Diversion service. Respond appropriately to service enquires.

All level 4 roles will have the following common/core competences.

All competences are national occupational standards (NOS)

Specific competences to the role have then been identified. Any additional competences specific to the locality should then be identified locally using the competence tools and the health functional map and added to the template using the same format.

Common/Core Competences for all Level 4 Roles:

Underpinning Principles	Reference Function		Competence
1. Communication	1.2	Communicate effectively	GEN97 Communicate effectively in a health care environment
2. Personal and People Development	2.1.1	Develop your own knowledge and practice	SCDHS0023 Develop your knowledge and Practice
	2.1.2	Reflect on your own practice	GEN23 Monitor your own work practices
3. Health, Safety and Security	3.5.1	Ensure you own actions reduce risks to health and safety	IPC2.2012 Perform hand hygiene to prevent the spread of infection
			PROHSS1 Make sure your own actions reduce risks to health and safety
			PMVRV1 Make sure your actions contribute to a positive and safe working culture
	3.5.2.	Protect individuals from abuse	SCDHSC0024 Support the safeguarding of individuals
5. Quality	5.1.1	Act within the limits of your competence and authority	GEN63 Act within the limits of your competence and authority
	5.1.2	Manage and organise your own time and activities	HT4 Manage and organise your own time and activities
6. Equality & Diversity	6.1	Ensure your own actions support equality of opportunity and diversity	SCDHSC0234 Uphold the rights of individuals
B. Health Intervention	2.1	Obtain information from individuals about their health status and needs	CHS169 Comply with legal requirements for maintaining confidentiality in healthcare
D. Information Management / Information and Communication Technology	D2.4	Maintain information/record systems	CFA_BAD 332 Store and retrieve information using a filing system

Underpinning Principles	Reference Function		Competence
H. Management and Administration	H1.3.1	Contribute to the effectiveness of teams	SCDHSC0241 Contribute to the effectiveness of teams
	H2.6	Receive and pass on messages and information	ESKITU020 Use digital communications

Role Specific Competences

Underpinning Principle	Reference Function	Competence
1. Communication	Communicate effectively	SfJ AB1 Communicate effectively with people
	Communicate effectively	SfJ AB8 Communicate with people from vulnerable groups
	Provide information, advice and guidance	CHS174 Advise and inform others on services
2. Personal and People Development	Support the development of the knowledge and practice of others	CFAM&LDC2 Support individuals' learning and development
4. Service Improvement	Contribute to improving services	CFA_CSD9 Promote continuous improvement
D. Information Management/Information and Communication Technology	Input data/information for processing	ESKITU081 Retrieve and present structured data
	Maintain information/record systems	SS33 Enter, retrieve and print data
		CFABADD321 Collate and organise data
		CFA_ BAD322 Analyse and report data
H. Management and Administration	Organise and co-ordinate events	CFA_BAA412 Plan and organise meetings
	Manage an office environment	CFA_BAA118 Manage an office facility
	Produce documents to an agreed specification	CFA_BAA123 Prepare text from notes
		CFA_BAA441 Take minutes
	Receive and pass on messages and information	SCDHSC3115 Process information for decision-making

Locality Specific Competences

In this space you can define additional competences which are essential for your local needs.

Go to the Health Functional Map to begin your search for the competences related to the additional tasks or functions you have identified.

All competences are cross referenced to the NHS knowledge and skills framework (KSF).

Underpinning Principles	Reference Function		Competence

Indicative Learning and Development

Transferable roles may be underpinned by a range of learning and development activities to ensure both competence and role confidence. The learning and development included within the template is by nature indicative. In some cases, it is endorsed by professional bodies and/or special interest groups and accredited by an awarding body.

Transferable role	Level 4 Liaison and Diversion Service Senior Administrator
Formal endorsed learning	Care Certificate (develop in role) Level 3 Diploma in Business Administration if not previously gained (develop in role)
Informal learning	Mandatory training within the service, including information governance and data protection Locality specific training within the service ECDL Excel Budgets Data analysis
Summary of learning and development including aims and objectives	
Duration	
National Occupational Standards	As detailed within role outline. The performance criteria and knowledge statements in each NOS will form the basis for the development of specific learning outcomes for each person and may be used to develop generic learning outcomes for each module/unit of learning.
Credits (including framework used)	Wherever possible learning should be credit rated to enable transferability and progression
Accreditation	Wherever possible learning should be accredited by education providers, professional bodies or similar
APEL and progression	Wherever possible learning should be transferable through APEL and should enable progression to other formal learning
Programme structure	
Resources required, e.g. placement learning, preceptors, accredited assessors etc	
Quality Assurance	
Policies included in programme documentation	For example: • Equal opportunities, • Accessibility • Teaching and learning

	• Assessment, internal verification and moderation • Appeals procedure • APEL processes • Staff development • Academic standards • Equality and diversity • E-safeguarding and Safeguarding • Health and safety • Grievance and disciplinary procedures
Funding	
Leading to registration or membership with:	

Continuing Professional Development

It is recognised that continuing professional development is an essential component to maintaining competent, safe practice at all levels of the career framework.

The following is considered the minimum required to maintain competence within this role. Learning should be active, with the impact on service delivery clearly defined and agreed between the learner and their line manager. A range of methods for capturing the impact of learning may be used e.g. learning contracts, reflective accounts, productivity measures, appraisals systems and processes.
Wherever possible learning should be accredited and/or credit rated and should focus on the needs of the individual in the role.

Statutory and Mandatory learning of particular relevance to the role	None identified	
Formal endorsed learning	Title	None identified
	Awarding body	
	Credit	
	QCF code	
	Level	
Informal learning	Negotiated at appraisal/performance review.	
Method of capturing impact	Annual appraisal	
Funding required	Dependent upon agreed CPD plan and negotiated locally	
Frequency required (once a year, once every two years, twice or more a year)	Annual learning needs will be identified and planned as part of the appraisal process. Specific goals will be agreed and the best method for achieving them negotiated.	

References:

2010 Skills for Health Summary of Attributes and Definitions for Career Framework Levels

2014 Skills for Health Employability Skills Matrix

2013/14 NHS England Liaison and Diversion Operating Model

2017 NHS England Liaison and Diversion Standard Service Specification

Characteristics of a role at Level 4 will include some or all of these:

Knowledge / skills

Use of a wide range of work area-specific practical and theoretical knowledge, which informs the approach planned to tasks that arise in work and /or study.

- Evaluates outcomes in terms of the –planned approach used
- Demonstrates self-directed development and work practice

Leadership / management

Manage their role under guidance in work contexts that are usually predictable and where there are many factors involved that cause change and where some factors are interrelated.

- Work is guided by standard operating procedures / protocols
- Plans straightforward tasks

Innovation / decision making

- Formally comments/makes suggestions on procedures or possible service developments
- Proposes changes to working practices or procedures for own work area.
- Solves problems by integrating information from expert sources taking account of relevant social and ethical issues.

In order to:

- Perform clinical, technical, administrative or scientific procedures
- Make judgements requiring a comparison of options
- Make suggestions for improvement to outcomes.

Assistant Practitioners may:

- Supervise routine work of others
- Be responsible for safe use of highly complex equipment
- Take some responsibility for the training of others and may deliver training.
- Undertake financial transactions working within organisational processes and policies
- Evaluate equipment, techniques and procedures
- Assist with clincal trials or research projects within own work area

Source: Skills for Health Career Framework Attributes