

Core Skills for Administrators

Demonstrator Projects
Case Studies



Introduction

In 2010, NES supported a number of demonstrator projects designed to test the use of the Administrative Skills Map. These projects were run within NHSScotland Boards and aimed to provide support for staff in administrative roles within the Boards.

These case studies are designed to share the learning which resulted from 6 of these demonstrator projects. They should be read in conjunction with **The Administrative Skills Map: Core Skills for Administrators in NHSScotland** (http://www.nes.scot.nhs.uk/media/860456/skills_map_draft_version_7_accessible_format.pdf).

For more information about core skills and other resources for staff in administrative roles, visit The Admin Centre (<http://www.theadmincentre.nes.scot.nhs.uk>).

Case Studies

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Case Study 1

NHS Borders: Development Programme for Personal Assistants



NHS Borders used the Administrative Skills Map to help develop a development programme for Personal Assistants working in different areas of the health board.

The project lead in NHS Borders was Julie Roberts, Corporate Business Training Manager. In this case study, she describes NHS Borders' project and how it has benefited both staff and the health board itself.

Tell us a bit about the problem or opportunity which prompted the project:

Personal Assistants (PAs) and secretarial staff work in a wide range of departments in NHS organisations, carrying out similar roles but often using different systems and sometimes with different expectations.

This can be inefficient and also frustrating for staff and managers. The Training & Professional Development staff in NHS Borders wanted to provide some development opportunities that might help personal assistant/secretarial staff contribute to the creation of consistent working models. If all went well with the development programme, staff could feel more confident in their roles, and work together to create better working practices, resulting in greater efficiencies.

What did you decide to do?

We started working with senior PAs and a local college to identify development opportunities. We noticed that the Scottish Qualifications Authority (SQA) offered a Professional Development Award (PDA) in Office Administration and found that the areas it addressed were similar to those in the administrative skills map.

This gave us a sense-check. The map told us what skills to expect of NHS admin staff at various levels and the PDA indicated these same skills. The PDA could provide us with a tailor-made way to develop these skills - it was a perfect match.

We worked with the local college to design a set of PDA modules that would fit NHS Borders' needs and recruited 12 PAs and secretarial staff to participate in the programme.

The learning programme focused on:

- Providing a service – processes and procedures, time management, deadlines and reminders, planning ahead
- Working with people – covering communication and customer service skills
- Working with information – such as IT skills and managing information

The programme was delivered over 9 months with students attending a weekly evening session at the local college.

What results have you seen?

By January 2012, eleven of the twelve participants had completed the programme and the feedback was very encouraging. While the course reinforced what students already knew, they had learned new skills too. And by asking the students about their feelings of confidence before, during and after the course, the project has been able to show a marked increase in confidence in all of the skills areas.

Importantly, staff are seen as having more flexibility now and this may have something to do with another outcome from the project. The skills map work prompted the development of a toolkit which gives practical advice on the organisation's working processes, providing clarity and consistency for the PA and secretarial community. This has been made available to all staff via the intranet.

This development highlights a key issue. The whole project has shown that it isn't just about having better skills, but also knowing what's expected of you. By clarifying what knowledge and skills are important, the course and toolkit have helped staff to understand the requirements of their role. Crucially, the skills map relates to the KSF too, completing the picture for administrative staff, helping them to understand how their knowledge and expertise can be demonstrated during their Joint Development Review Process.

What were the main challenges of the project?

Designing the project so that the return on the investment of time and resource can be measured is crucial. It took time and a lot of effort to get the

evaluation process right at the beginning of the project. But it was worth it. In particular, asking the staff about their confidence levels, before, during and after the course really helped us identify what staff and their managers – and their work – were gaining from the programme.

What are the next steps?

At the time of writing, a new group of staff are working their way through the PDA and those who have completed the course are reaping yet more benefits as they begin to take part in the Productive Leader programme which is being rolled out across NHS Borders. PAs and secretarial staff are bringing their experience and new learning to wider discussions about the management of meetings, email traffic and workload. And the toolkit continues to help existing and new staff to understand work procedures.

We also have plans in place to use the **Administrative Skills Map** in workforce planning and the recruitment process in the future.

We are also looking to pilot it as a competency framework for PAs/ secretarial staff, so the benefits of the map are embedded in the organisation. The map's usefulness doesn't stop at the demonstrator project.

KEY POINTS

Julie sees the Administrative Skills Map as an important tool for:

- Workforce planning
- Supporting recruitment
- Developing a competency framework
- Providing examples of evidence for KSF
- Providing learning & development to staff in these roles

For more information about the Professional Development Award (PDA) in Office Administration and other qualifications for administrative staff, see the **VQ Finder**: www.vqfinder.nes.scot.nhs.uk

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Case Study 2

NHS Dumfries & Galloway: SVQs for Administrative Staff



NHS Dumfries & Galloway used the Administrative Skills Map to help identify the knowledge and skills needed by administrators in different roles and how these linked to Scottish Vocational Qualifications (SVQs) in Business and Administration.

The project was led by Alison McConnachie who describes the NHS Dumfries & Galloway project and how it has benefited both staff and the health board itself.

Tell us a bit about the problem or opportunity which prompted the project:

The Development team at NHS Dumfries and Galloway were aware that Administrative and Clerical staff tend to get left behind when it comes to development opportunities.

We wanted to look at how we could extend the range of SVQs offered to include this vital staff group.

The demonstration project was a great opportunity for us to look at Administrative and Clerical staff training as a whole. If we were going to offer an SVQ in Business & Administration, we would need trained assessors and a good understanding of the development needs of administrative staff.

This was a challenge because administrative staff perform a range of roles in different areas of the organisation so it's difficult to pin down a definitive set of skills that they need. By using the skills map, the assessors and candidates were able to identify what was really needed by way of knowledge and skills to undertake the various SVQ units.

What did you decide to do?

The SVQ units chosen by the staff reflected the work that they actually undertake within their jobs so, by mapping the chosen units against the skills map, we were able to build a good picture of the knowledge and skills required by admin staff in the various roles across NHS Dumfries and Galloway.

The work allowed us to develop a much deeper understanding of the knowledge and skills of our administrative staff, helping us to develop skills profiles for staff. As the units are chosen according to what staff actually do, this information has been fed into the organisation's learning needs analysis.

This, in turn, will help us to make the learning programmes we deliver more targeted and focussed, to the benefit of both existing and new members of staff.

What results have you seen?

The skills map has brought a number of benefits. In terms of qualifications offered, six candidates and four work-place assessors have achieved their awards and the organisation has extended the range of SVQs it delivers. NHS Dumfries and Galloway now has qualified and experienced assessors. There has been an increase in the uptake of courses that provide the underpinning knowledge, for example, Active Listening and Note Taking, and Communicating with Confidence.

A further benefit to administrative staff has been the development of an Admin Focus Group. The project meant that we brought managers of administrative services together to discuss skills development - this hadn't happened before. Now we have a new network we can use to keep staff up to date with developments on the project. Through discussions with the members of the Admin Focus Group, the skills map is being used to inform PDPs, with this being recorded on e-ksf. Those candidates who achieved their SVQ units are using their evidence in their KSF conversations with their reviewer to show that they are applying skills and knowledge consistently.

What were the main challenges of the project?

It's not easy to keep up the momentum. I noticed that, after a good amount of time and effort to get things going - and initial enthusiasm from management - it was a challenge to retain support for continuing the various outputs of the project. For example, SVQ units change and I need to put the time aside to see how this might change the skills profiles. That's a big commitment - it takes time to keep things going and everyone is under pressure. My advice to someone thinking of doing a similar project would be to seek advice. Find out more about what it takes to make something like this happen and plan for it.

Final thoughts?

Overall, this project has given us a deeper understanding of the knowledge and skills of administrative staff, and has provided us with a tool to discuss development. The skills map has also been useful for informing staff who wish to aspire to other jobs about the knowledge and skills that are required to help them do so.

KEY POINTS

Alison suggests that the skills map can help with the following issues:

- Use the skills map to identify underpinning knowledge and skills - this can help individuals to prepare before attempting the SVQ units
- Skills profiles can be used to support staff working within the various administrative services to identify their learning needs, and to develop a development plan for new members of staff.
- Through the identification of learning needs, learning solutions can be more tailored and resources more targeted within the organisation

For more information about qualifications for administrative staff, see the **VQ Finder**:
www.vqfinder.nes.scot.nhs.uk

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Case Study 3

NHS Lanarkshire: Using Coaching to Develop IT Skills



NHS Lanarkshire used the Administrative Skills Map to help identify gaps in the IT skills of staff in different administrative roles and used their project to trial a new approach to addressing those gaps.

The project was led by Agnes Robb, Training Manager in NHS Lanarkshire's Organisational Development Directorate. In this case study Agnes describes the NHS Lanarkshire project and how it has benefited both staff and the health board itself.

Tell us a bit about the problem or opportunity which prompted the project:

Using IT systems to communicate and manage data is a normal part of daily life for most administrative

staff, but assumptions are often made about the specific skills that staff possess. Many have developed their skills on the job and, as a result, have found ways around problems – but may not be able to use IT systems as efficiently as possible.

The Administrative Skills Map provided us with very clear guidance on the range of IT skills administrative staff might need at different levels. As a result, we decided to look at how we could help individuals identify gaps in their IT skills and address those skills gaps effectively.

What did you decide to do?

We used the funding for the demonstrator project to purchase some external IT training. We then set up a 'nomination' process that would allow staff to request a training session to deal with specific IT issues. This involved developing an online form that allowed staff to book one-to-one coaching sessions on IT topics they were unsure about or tasks they needed to carry out more efficiently.

The online requests were screened against the skills map to help us ensure that the support which was being requested was appropriate to the level of the individual's role. In the vast majority of cases, we found that there was a clear match.

When the application for coaching was approved, the coach would arrange a one-hour session with the individual staff member at their desk.

The sessions were very focused and designed to cause as little disruption as possible, requiring no travel and therefore reducing the costs to the organisation. Training was delivered on the staff member's own PC, using their documents, concentrating on specific issues that they needed help with - from learning about mail-merge to using a database.

What results have you seen?

We've had very good feedback about this new approach to IT training. Staff found the booking process simple to use and the direct contact with the training provider enabled them to arrange a suitable date and time to meet their specific individual needs and the needs of the department.

Feedback indicates this one-to-one coaching has helped administrative staff to change practices and processes, helping to reduce the time taken to complete tasks. Many say they are more confident in using IT and, in particular, specific software. They have also identified time saved in arranging meetings using Outlook, creating and using contact lists, producing data, figures, reports and PowerPoint presentations.

In addition, the organisation has a clearer picture of its staff development requirements and skills gaps. By showing the generic nature of the tasks involved at various levels, the map has brought the need for specific skills into sharp focus - and given the organisation a structure in which to record this. The online application process provided information about the numbers and grades of staff requesting IT coaching, where they were based, their area of work and the specific area of IT where they required training. It was easy to see patterns in the requests received for IT coaching sessions around specific areas of knowledge and skills at the different bands.

What were the main challenges of the project?

The project wasn't without its challenges. Administrative staff are employed in almost every department within the Board, some part-time, some working evenings only. Negotiating work schedules with the external training supplier was difficult.

Importantly, a key part of a demonstration project was evaluation and this required planning ahead. It was very difficult to measure the larger impact on departments and the organisation as a whole as we didn't have a base line of information to start with. Knowing how much time people spent on specific tasks before they had the training would have helped with this.

Final thoughts?

The success of this project has meant that we have been able to expand it to other staff groups. IT skills are vital for all staff and other departments have looked on, somewhat enviously, wanting to offer similar training. Luckily, we have managed to secure funding to roll the coaching programme out to other staff groups.

So the skills map is set to play a wider role in workforce planning and development, helping NHS Lanarkshire to identify the skills needed for particular posts and relating them to relevant KSF levels and dimensions, job profiles and job descriptions.

KEY POINTS

Agnes gives the following suggestions for individual staff members using the skills map:

- Use the skills map to identify current skills and any gaps
- Discuss with your line manager how to address gaps
- Look at what skills you have that are transferable
- Look at what additional skills you need to develop to progress to other roles and how you can develop these skills

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Case Study 4

NHS National Waiting Times Centre:

Skills Development Programme for Administrative Staff



NHS National Waiting Times Centre used the Administrative Skills Map to underpin a new skills development programme for administrative staff.

In this case study, Donna Akhal, Learning & Development Manager, describes the project.

Tell us a bit about the problem or opportunity which prompted the project:

We know that all staff – including administrative staff – need to keep their skills up to date and need to have opportunities for development. However, with administrative staff working in such a wide range of areas in the organisation, it can be difficult

to define what skills really matter and which areas need more development. In the National Waiting Times Centre, we wanted to identify specific skills likely to be needed by administrative staff with a view to creating a Skills Development Programme.

What did you decide to do?

We devised a learning needs analysis using the administrative skills map. This had two main advantages. Firstly, the process of identifying skills gaps and training requirements was made simpler by the skills map. Rather than using a range of job descriptions to find out what staff were required to do in different roles, the map gave us one place to start from. It also gave all staff a common skills model to work from, which is important because administrative staff work in a wide range of settings, departments and have a wide range of responsibilities. Overall, using the skills map as the underpinning framework for the needs analysis made the development process much more efficient and focused.

What results have you seen?

The skills map provided the guidance we needed to identify the skills needs of staff. As a result of the learning needs analysis, we have been able to offer a suite of training modules for administrative staff, including various SVQs.

These are being taught on-site in association with Clydebank College and 8 staff are currently working through an SVQ programme. Not only will they gain a nationally recognised qualification, they also have a chance to get together and network with colleagues in other areas of administrative services.

An Essentials Administration Skills Toolkit has also been launched. The toolkit signposts staff to various learning and development opportunities including training courses, information on funding and other useful resources.

What were the main challenges of the project?

Our main challenge can be summed up in a single word - time! Take up for training courses has not been at the expected level, generally due to work pressures and the difficulty in releasing staff for training. Having created opportunities for staff to develop skills, the programme now needs support in the form of protected time to allow them to attend courses and study. We're looking at putting some of the materials onto our e-learning platform but again there are time and resource implications.

Another challenge has been evaluation. We would like to know how successful we have been overall, and the extent to which the programme helps individuals and the organisation. Evaluation would have been much easier with a baseline of information – that is, a picture of what skills development looked like *before* the skills map arrived. This would have really helped us to evaluate the real impact of the map on the wider organisation and demonstrated the project's return on investment.

I really recommend identifying tangible examples of changes and benefits that can be measured as the project progresses. Evaluation is so much easier when you have clear evidence of real, measurable benefit.

Final thoughts?

I think that it's important to provide learning materials in different formats. For example, by providing our new learning materials in e-learning form, we are hoping that staff will access training in a way that's most convenient for them.

KEY POINTS

Based on her team's experience of the project, Donna gives the following suggestions:

- Make managers / staff aware of the skills map, how it was developed and identify how it could be used locally.
- Consult with managers / staff / Learning & Development team / HR team on current training provision and skills mix to identify gaps in training.
- Plan your evaluation of all training so that evidence of return on investment can be generated
- Consider different modes of training (e-learning, self directed learning, classroom etc.)

For more information about qualifications for administrative staff, see the **VQ Finder:** www.vqfinder.nes.scot.nhs.uk

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Case Study 5

NHS Western Isles: Redesigning Patient Services



NHS Western Isles used the Administrative Skills Map to underpin the redesign of patient services to support the 18-Week Referral to Treatment (18 Week RTT) Standard.

Project Lead Stephan Smit, Patient Services Manager, describes the project.

Tell us a bit about the problem or opportunity which prompted the project:

Achieving the 18 Week RTT standard was very important for our health board as it was one of NHSScotland's HEAT targets.

Our Patient Services team had an important role in this work as this team are responsible for ensuring that the health records systems works effectively.

When we started to look at how we could meet the standard, we realised we needed to see if existing roles were appropriate and if the staff had the skills and competences required by those roles. We needed to know what skills were needed and where gaps were in order to deliver the service more effectively.

What did you decide to do?

We started by mapping health records job descriptions against the administrative skills map. This provided us with a sense check about the level of skills which were needed. We also mapped administrative roles in patient pathways to the main areas of administrative work described in the map, and linked that back to job descriptions. This helped to identify gaps in job descriptions – there were things we were doing that weren't reflected in job descriptions.

Following on from this mapping activity, I worked with the 18 Week RTT Project Officer (a former member of records staff) to make sure that the roles and skills identified in this process were appropriate. I also asked staff to use the skills map to self assess their competencies.

As a result of this work, important skills gaps were discovered.

These included time management, supporting others and being supported, and effective team working skills. The map also helped people to understand their responsibilities regarding service improvement.

Being able to describe clearly the skills gaps in the team meant we could provide more targeted guidance and support. Guidance has been provided for staff around supervision skills and we have provided time management training to help with prioritising workloads. This has raised confidence and encouraged supervisors to support team development more effectively, freeing up senior management time.

What results have you seen?

The use of the skills map helped us change staff rotations to fit better with the demands of 18 Week RTT. It also resulted in greater staff awareness about service improvement and we were able to introduce a variety of small changes which resulted in a reduction in reported errors around filing and clinic preparation in particular. Comparing two six-month periods, the number of reported incidents of errors in clinic preparation dropped from 28 to 2. Filing errors reduced from 63 to 12 and RTT completeness figures went up from 74% to 98%. Although this can't be attributed to the project alone, the redesign of rotations greatly supported this.

One of the key benefits from a managerial point of view was that the administrative skills map provides an objective base for both staff and managers to discuss skills needed by administrators.

Final thoughts?

Participating in the demonstrator project has given us some immediate benefits for staff and patients as well as a longer term investment.

The skills map has informed the development of future job descriptions, showing what's actually needed in a role.

What the map gives you is an objective statement of performance – to help people understand what they need to do in easy-to-understand language.

KEY POINTS

- As well as using the administrative skills map to inform this project, Stephan and his team also used it to inform personal development planning and review (PDP/R) discussions.
- See Case Study 6 for more details of how this was done.

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Case Study 6

NHS Western Isles:

Using the Administrative Skills Map to Support PDP/R Discussions



NHS Western Isles used the Administrative Skills Map to help staff discuss their personal development planning and review (PDP/R) with their reviewers.

Project Lead Stephan Smit, Patient Services Manager, describes the project.

Tell us a bit about the problem or opportunity which prompted the project:

I was a member of the Knowledge & Skills Framework (KSF) implementation team helping to embed the Framework locally. As we introduced

PDP/R discussions with staff, I began to notice that reviews with my own team weren't as effective as they could be. People found it difficult to see how their work linked to the descriptors in KSF and I began to think about how we could use the skills map as a 'translation tool'.

What did you decide to do?

I started to provide staff with the skills map prior to meetings so that they could use it to identify evidence of what they do and where there might be gaps. They then used it during KSF discussions, helping them to identify evidence/gaps.

Initially, they were quite sceptical about the project and the skills map, and this didn't dissipate until we started using the map during KSF reviews, when a 'light bulb' moment occurred. Discussing KSF using the skills map meant that evidence could easily be linked to relevant dimensions, levels and indicators. The map provided relevant examples of administrative skills and administrative team roles, using clear language. This helped staff to easily identify gaps, discuss learning and development opportunities and then update their PDP.

What results have you seen?

The map has made KSF reviews easier for staff and reviewers as there's a common language to use to

describe what people do, clearly stating skills and roles that are specific to administrators. The fact that the map is also cross-referenced to the KSF mean that making links with dimensions, levels and indicators is easy. All in all, it means that staff can prepare for their reviews more effectively.

Final thoughts?

I see a lot of potential for the map to be particularly useful when the reviewer may be a member of clinical rather than administrative staff. This is because it clearly sets out the skills required by administrators.

It could also help to identify where skills could be developed to help individuals prepare for roles in other areas. This would help staff who may want to progress their careers by moving into other areas of administrative work.

Overall, I'd really recommend using the skills map - because it works!

KEY POINTS

Stephan has the following suggestions for making best use of the administrative skills map:

- Share and discuss the skills map with your team
- Compare job descriptions recursively with the map - this takes time! This helps to identify skills gaps, and also ensures that required skills are at the right level.
- Compare KSF outlines with the levels set out in the skills map. Adjust as necessary.
- Use the skills map as a 'prompt for evidence' during reviews

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