Menu for Practice Management Development

This Menu is a supportive resource which is accessible and relevant to all those working in a Practice Management role.   There are now greater expectations and demands on the Practice Manager and their professionalism, capabilities, knowledge and skills, which has been driven by the increased awareness of the need to improve quality across health care.

If Practice Managers are to meet the challenges of the ever-changing NHS, they have to be able to identify their strengths and weaknesses. This then allows them to know which areas to focus on to develop the knowledge and skills required to deal with the quantity and complexity of information relevant to the Practice Manager's role and responsibilities.

Effective Practice Managers don't have to "know it all", but they do need to be aware of where they can find information on issues, they are not 100% confident about.

Using the Learning Needs Analysis (LNA) Tool will help to identify what you know and what you don't know, which will help guide and highlight areas for personal development.

Learning Needs Analysis

The LNA will help to determine the gap between existing skills, identify current knowledge and abilities, and help to clarify learning objectives and help set goals.

Following the completion of the LNA tool, you should produce a report that identifies and prioritises objectives that you can focus on in your personal development plan.

Learning Needs Analysis Scoring Guidance and Prioritising

LOW	• You don't know what you don't know. • You have very little experience on this particular subject. • You know this is a weakness and know you need to develop knowledge on this subject. • You do not feel at all confident in this area.
MEDIUM	• You understand or know how to perform the skill without assistance. • You can demonstrate the skill or knowledge. • It requires conscious thought and concentration. • You would benefit from developing the relevant skills further. • You feel reasonably confident in this area.
HIGH	• You have had so much practice with a skill that it becomes "second nature" and can be performed easily (often without concentrating too deeply). • You may or may not be able teach it to others, depending upon how and when it was learned. • You have complete confidence in your knowledge and skills on this subject. • You are aware that although you are comfortable with this, you do still need to refresh your skills and have protocols in place to do this routinely.

ACTION PLAN	• You now know what you don't know and have identified areas to focus on.
	• Consider which areas are a priority for you compared to others and use this column to prioritise your personal development plan.
	• Discuss with your line manager whether you just need to be aware of this area or if you need to know more.
	• Ask yourself if this is a realistic priority;
	   o Is there a training opportunity?
	   o Are you able to resource the information for self-directed learning?
	   o Will you have the opportunity to practice your new knowledge and develop the relevant skills?
	   o What level of skill is required for you to effectively carry out your role?

Practice Operation and Development	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
The 2018 General Medical Services (GMS) Contract and other contracting arrangements; eg Memorandum of Understanding (MoU)					
National Legislation and when/how to implement changes					
Local and National Health Policy and Targets					
Health & Social Care Partnership					
Leadership v Management					
Organisational Culture					
Strategic Management					
Change Management					
Project Management					
Significant Event Management					
Services and Health Promotion					
Development Plans/Reports					
Practice Policies and Procedures					
Meetings: Management and Facilitation skills					

	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
Ethical Practice and Professional Standards					
Clinical and Organisational Audit					
Quality Improvement					
Time Management					

Risk Management and Assessment	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
Clincial and Staff Governance: Issues and Statutory Requirements					
Health & Safety: Compliance with Statutory Requirements					
Policies: Develop, Monitor and Evaluation					
Developing a Safety Culture promoting Quality Improvement					
Occupational Health: Statutory Requirements					
Disaster Planning. Business Recovery/Continuity Planning, Insurance					
Infection Control					
Confidentiality and Disclosure:Policy and Legal Requirements					
Medicines Act 1971: Understanding and Management of Controlled Drugs, Emergency Drugs and other Treatments					

Partnership Issues	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
GMS Contract Requirements					
Statutory Requirements and Partnership options					
Partnership Agreements					
Partnership Changes and Recruitment					
Partnership Finance and Taxation					
Partnership Disputes					
Continuing Professional Development (CPD) Requirements, GP Appraisal, Revalidation					
Duty of Care: Good Practice					
GMC and Defence Union Resources					
GP Time Management: Rota, Capacity and Demand etc					
Non Principle GPs, Salaried, Retainer, Locums					
Partnership Meetings					
Drawings and Personal taxation					

Patient and Community Service	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
Reception Services and Practice Administration					
Patient Rights					
Patient Participation Groups					
Patient Information: Practice Leaflet, Practice Website, Waiting Room Notices.					
Complaints Handling					
Duty of Candour					
Patient Protection inculding Capacity and Child Protection					
Advance Directives: Adults with Incapacity & Power of Attorney etc					
Freedon of Information Act etc					

Finance	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
The Role of the Bank, Lawyer and Accountant					
Statement of Financial Entitlement					
Income Streams; Global Sum, Essential, Additional & Enhanced Services					

	Low	Medium	High	Priority (√)	Action Plan (Comments)
Practitioner Services					
Budgeting for Practice Development / Management of Financial Resources					
Private Investment.					
Insurance: Building, Practice, Legal, Locum, Tax etc					
Practice Accounts	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
• Establish processes and ensure financial/security control.					
• Payroll					
• Pensions					
• Monthly Invoices, receipts and petty cash					
• Claims, Targets and Quarterly payments (PSD)					
• Annual Accounts					
• Financial Planning, Managing Budgets, expenditure, deficiency					

Human Resources	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
Employment Law					
Workforce Planning: Skill Mix Review.					
Workload Anaylsis					
Recruitment and Selection,					
Induction and Training/Mentoring					
Team Working and Skill Development: Identifying Learning Needs					
Staff Appraisal: Effective Feedback, Personal Development Plans					
Pastoral Care					
Promotion of Health and Well Being; Prevention of Adverse Effects					
Conflict and Dispute Resolution					
Disciplinary Procedures					
Performance Review and Managing Poor Performance					
Commission/Facilitate training					
Staff Contract and Job Descriptions					

Premises and Equipment	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
Surgery Insurance					
Service Level Agreements					
Equipment and Facilities Management and Maintenance					
Electrical Safety and PAT Testing					
Security					
Business Case Development.					
Improvement Grants: Premise Development Opportunities.					
IT Managment	Current Understanding			Priority (√)	Action Plan (Comments)
	Low	Medium	High		
GDPR Regulations and Data Protection Act 2018					
Access to Health Records: Confidentiality and Disclosure					
Caldicott Guardianship					
Security and Risk Assessment					
Using Data as a Management Tool.					
Information Governance					

Population Care		Current Understanding			Priority (√)	Action Plan (Comments)
		Low	Medium	High		
Health Needs Assessment						
Service Performance and Prioritisation						
Cluster Groups						

Additional Subjects		Current Understanding			Priority (√)	Action Plan (Comments)
		Low	Medium	High		
Value of profession working relationships with peers and colleagues from other practices and other external organisations						
Dispensing Practice income and organisation.						