



Gofal Cymdeithasol **Cymru**  
Social Care **Wales**

Royal College of Occupational Therapists  
Coleg Brenhinol y Therapyddion Galwedigaethol



# Occupational therapists in social care: A learning and development framework

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### Other formats:

This document is also available in Welsh.

# Foreword

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Foreword by

**Rebecca Evans,  
Minister for Social Services  
and Public Health**

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The Social Services and Well-being (Wales) Act 2014 was introduced to transform the way that care and support are delivered to the people of Wales. It focuses on promoting a person's well-being as an individual, as part of a family, and as part of their community. I welcome this emphasis on prevention and early intervention, and the focus the Act puts on giving people more influence and control over their care.

Occupational therapists have a vital role to play in the transformation of social care. People of all ages who experience illness, are disabled, or have care and support needs, value the particular contribution that occupational therapists make to their recovery, maintaining their independence and quality of life. Their knowledge and expertise is essential for the modernisation of these services, and provides a valuable resource for people and colleagues. Occupational therapists share a commitment to improving support services for people, and to developing a better evidence base to underpin their interventions. This learning and development framework for occupational therapists working in social care is a major contribution to achieving that goal.

The learning and development framework for occupational therapists is not intended as a detailed blueprint for an individual's future, but rather it sets our ambitions and expectations for the occupational therapy workforce in social care. Following the principles set out in this framework will deliver real benefits for the people of Wales by improving the outcomes, developing the skills and working practices of the professionals delivering those services.

I have great pleasure in endorsing this framework and I expect it to be a key reference document for occupational therapists, managers and directors in social care. It contributes to what is already happening within the social care workforce, by linking individual career needs with organisational workforce requirements and describes both the development of occupational therapists and their increasing role as part of multi-disciplinary teams driving improvement in social care in Wales. This document supports and encourages their leadership in promoting aspirational thinking and challenging assumptions about how occupational therapy should be delivered in social care.

# Purpose and structure

## Purpose

The purpose of this framework is to provide guidance for occupational therapists (OTs) working in social care in Wales. It will facilitate occupational therapists' professional, clinical and management development to ensure skills are maximised and services are effective. It will assist in meeting the career needs of occupational therapists and in shaping future occupational therapy careers in Wales, to maximise the impact of the occupational therapy workforce in their delivery of social care services. It also aligns with the NHS Allied Health Professions (AHP) post-registration framework to allow facilitated movement towards more integrated health and social services.

## Structure of the framework

The framework has two main parts: **levels of practice** and **pillars of practice**.

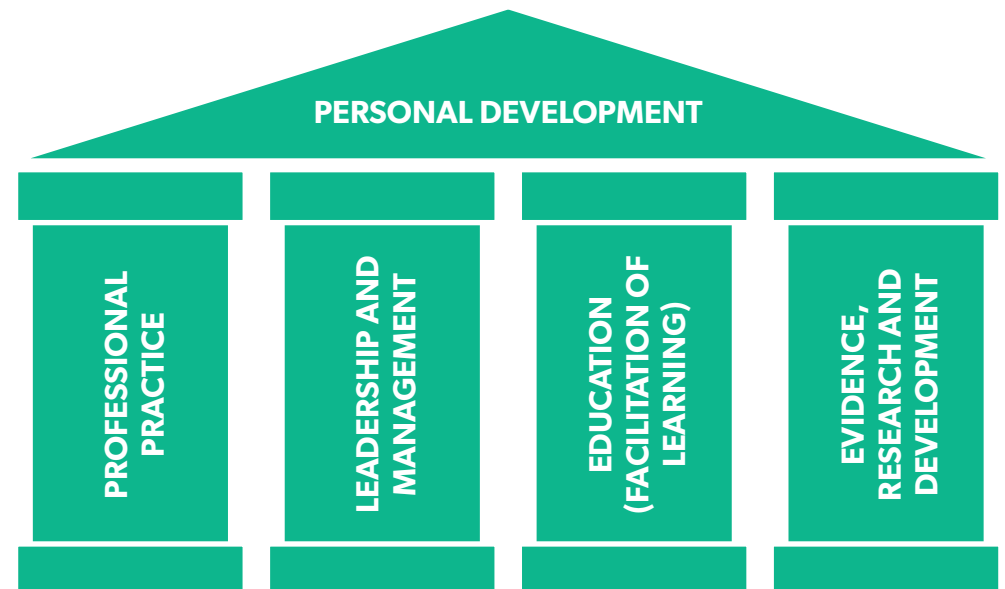
**Levels of practice:** This career development framework is based on levels 5-9 of the career framework for health (Skills for Health, 2006; Scottish Government, 2009). This will aid workforce flexibility, providing a common currency to map employees' competence portfolios, and to identify areas of transferability to other job roles. This allows progression in directions that may not have been identified through traditional routes and may allow development into the next level prior to, or even without, attainment of higher pay banding. The **overview** of each level provides a description of the attributes expected and suggests the qualifications levels that should be undertaken to support the development. Each level of practice builds on the one before so as to avoid repetition.

## Pillars of practice

The four pillars of practice are:

- Professional practice
- Leadership and management
- Education (facilitation of learning)
- Evidence, research and development

The proportion and expertise associated with each pillar will vary according to the role and level.



Each pillar of practice is divided into **aspects of practice**:

Pillar of practice	Aspects of practice
Professional practice	<ul style="list-style-type: none"> <li>• Maintain occupation at the centre of practice</li> <li>• Safe, effective and person-centred care</li> <li>• Professional judgement and decision making</li> </ul>
Leadership and management	<ul style="list-style-type: none"> <li>• Identify, monitor and enhance own knowledge and skills</li> <li>• Team work and development</li> <li>• Professional and organisational leadership</li> </ul>
Education (facilitation of learning)	<ul style="list-style-type: none"> <li>• Teach, mentor, supervise and/or assess others</li> <li>• Facilitate practice learning</li> <li>• Learning, teaching and assessment</li> <li>• Creation of the learning environment</li> </ul>
Evidence, research and development	<ul style="list-style-type: none"> <li>• Influence broader socio-economic and political agendas</li> <li>• Create, use and/or translate evidence to inform practice</li> <li>• Design, implement, evaluate and disseminate research</li> <li>• Evidence into practice</li> </ul>

Within this framework sphere of responsibility, key knowledge, skills and behaviours, and opportunities for educational and professional development have been outlined for each aspect of practice.

For occupational therapists working at any of the levels within the framework, it is important their role contains an element of all the pillars of practice based on the aspects of practice. As an individual's career progresses, the proportion of their role under each pillar will change. Some thought will therefore need to be given by organisations and managers as to how individuals can be developed across all four pillars and so facilitate the development of career pathways away from the more traditional routes and towards future areas of practice that will meet the future health and social care needs.

# Benefits

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The learning and development framework for occupational therapists in social care will benefit both the organisation and its employees. Evidence shows the link between staff engagement, including training and development, and improved quality of care and outcomes. It must fit with the culture of the organisations, set realistic expectations for employees, and help individuals develop their required competences for safe practice. The framework will:

- support occupational therapists in developing and evidencing they have the necessary knowledge and skills to respond to people's evolving health and social care needs
- outline professional development that provides assurance of up-to-date, effective and safe practice regardless of care setting
- support the development of occupational therapists across all four pillars
- provide robust and consistent guidance for education and training to ensure future resources are targeted and utilised in line with the prudent health and social care agenda, and meet future service needs more effectively
- help organisations understand where the workforce talent is concentrated: how prepared, or ill prepared, they are to meet future needs and challenges
- ensure talent management and succession planning is maximised
- demonstrate how occupational therapists can be developed and retained, while simultaneously improving the performance of the organisation
- support managers as they seek to workforce plan to meet future service delivery
- better articulate the education requirements of individuals at a local level
- better articulate wholesale workforce development and changes that can both inform planning colleagues in relation to existing plans, and help guide and underpin new service plans (i.e. ensure workforce plans are integrated).

# Aligning the framework

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An occupational therapist's career in social care should be seen as a continuum from the point of entering pre-registration education to the point the individual leaves the profession. Post-registration AHP careers therefore build from the initial preparation that leads to registration and should not be seen in isolation from it.

The learning and development framework for occupational therapists in social care links individual career needs with organisational workforce requirements and supports the integration agenda by providing a common language that can be used to link it with the post-registration framework for AHPs in the NHS (WG/NHS, 2016).

It has regulatory fit with the Health and Care Professional Council (HCPC) through the standards of continuing professional development and standards of proficiency, recognising the scope of practice is the area or areas of the profession in which you have the knowledge, skills and experience to practise lawfully, safely and effectively, in a way that meets the HCPC standards and does not pose any danger to the public or to the registrant.

It also links with the Career Development Framework published by the Royal College of Occupational Therapists, enabling the individual to develop their career across the whole health, social care and housing sector, and across a range of employers. The focus on occupation-centred practice in the Career Development Framework is present in this document enabling occupational therapists to relate their professional body's Standards of Practice and Code of Professional Conduct and Ethics into their professional development and career planning.

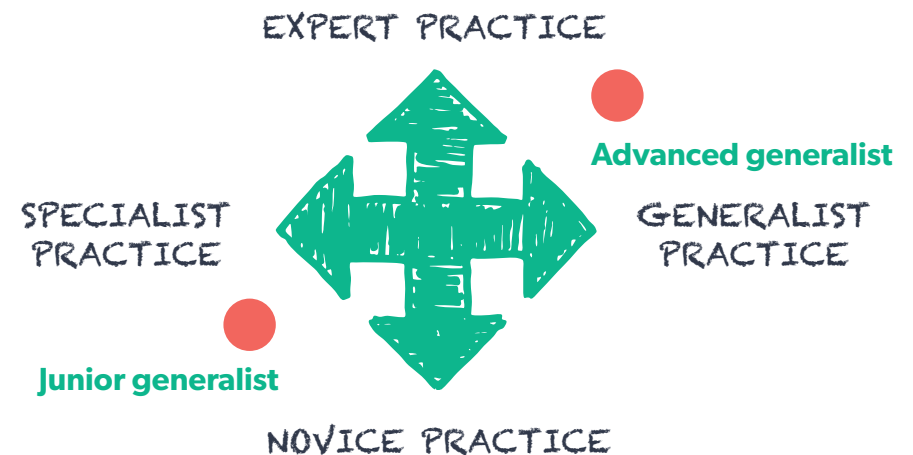
It should be noted that the nine levels of the career framework do not automatically read across to any particular pay bands in either social services or the NHS. The career framework is presented as an enabling tool that provides a common language and currency to support career development in identifying the expectations at each level and the competences expected of the post holder.

# Terminology and definition

It has been suggested that advanced practice acts simply as a broad term that refers to all practice roles at a level above that of initial practice, including under its umbrella both 'specialist' and 'consultant' roles. This approach is unhelpful in that it adds little in terms of clarity or consistency, may further confuse both professionals and the public, and as a result compromises governance in relation to expectations of practitioners and the service as a whole.

Practitioners working with a 'specialist' title contribute in important ways to healthcare provision in NHS Wales. However, it is recognised that there is not a shared understanding of the 'specialist' role among stakeholders, and this may reduce the impact and effectiveness of such roles. The terminology issues around 'specialist' practice titles continue to create difficulties and confusion for the public, service leads and practitioners themselves.

Considerable debate has focused on whether 'specialist' practice is at a lower level than 'advanced'. It is increasingly widely accepted that 'specialist' should be considered as one pole of the 'specialist – generalist' continuum (as illustrated opposite) rather than on the developmental continuum from novice to expert. This approach defines 'specialist' practice as that which is particular to a specific context, be it a client group, a skill set or an organisational context.



It is argued that 'advanced' practice is a particular stage on a continuum between 'novice' and 'expert' practice. The 'advanced' role profile is characterised by high levels of clinical and research skills, competence, autonomous decision-making, alongside a leadership and educational element to the role and reflects a particular benchmark on the career development ladder as exemplified in the Career Framework for Health.

The NHS Career Framework differentiates the level between practitioner level and advanced level using the term 'senior'. This helps remove the ambiguity over the specialist title. For this reason, the terms 'senior' and 'advanced' will be used in this framework when describing benchmarked developmental levels, and the term 'specialist' will be used if required to define specific contextually-focused role types. This is not to devalue 'specialist' knowledge or skills, but to recognise that such skills, in themselves, do not characterise an advanced level of practice.



# Newly-qualified occupational therapist

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## Career framework Level 5

### Generic description of job

As a newly-qualified practitioner, this role would expect to actively engage in a consolidation period, such as preceptorship, and in their first year would be likely to have to deal with manual handling or disability issues with appropriate levels of support.

The job role will include:

- enabling people to do the things they want, need or are expected to do to support their well-being
- undertaking holistic assessments, working autonomously with a mixed and unpredictable caseload, which might include lone working in people's own homes where they are in community teams
- the ability to demonstrate appropriate clinical reasoning and be able to complete task analysis
- plan occupational outcomes with a person, provide the full range of 'usual' interventions. These would be individualised and person specific but not highly complex/specialist
- having a comprehensive range of knowledge and a clear understanding of the boundaries of their skill
- having a comprehensive understanding and application of the legislation and criteria affecting their work
- responding to a range of routine referrals and managing a varied caseload, which may include access to the home, bathing, undertaking

capacity and risk assessments, safeguarding, data protection, etc, with appropriate levels of support.

After an appropriate period of consolidating knowledge and practice into experience, the following can be added:

- training carers and informal carers with appropriate levels of support
- assessing, planning, writing and reviewing care packages, planning goals in reablement
- advising for Welsh Housing Quality Standard (WHQS), homes for life adaptations and environmental adaptations
- taking students on placement on consolidation of their new graduate skills.

## Career framework Level 5

Registered practitioners consolidating pre-registration experience and patient/citizen-centred care, and getting ready for a higher level of functioning. The Level 5 practitioner is on a journey from novice, when initially registered, to practitioner.

People at Level 5 will have a comprehensive, specialised, factual and theoretical knowledge within a field of work and an awareness of the boundaries of that knowledge. They are able to use knowledge to solve problems creatively, make judgements that require analysis and interpretation, and actively contribute to service and self-development. They may have responsibility for supervision of staff or training (©Skills for Health).

Practitioners have a broad knowledge base in a particular field of practice, which enables them to work with a considerable degree of autonomy. They may have line management responsibilities but will not be responsible for service delivery. They actively use research findings to enhance and underpin their practice. A practitioner is competent in their area of practice and will seek opportunities to improve the service they offer (Skills for Health).

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Professional practice</b> <ul style="list-style-type: none"> <li>• Safe, effective and person-centred care</li> <li>• Professional judgement and decision making</li> </ul>	<p>Continues to develop competence in meeting the holistic, occupational needs of citizens and the wider public</p> <p>Uses comprehensive specialised factual and theoretical knowledge to solve problems, with an awareness of limits of their knowledge base</p> <p>Evaluates own practice and identifies own development</p> <p>Has a comprehensive range of cognitive and practical skills required to develop creative solutions to abstract problems</p> <p>Makes judgements requiring analysis, interpretation and comparison of options</p> <p>Assesses risk and acts on findings to ensure citizen safety</p> <p>Works autonomously within scope of practice to exercise judgement about actions, while accepting professional accountability and responsibility</p> <p>Consolidates own knowledge, skills and attitudes through mentoring and reflective practice</p>	<p>Effectively manages a designated caseload for a delegated area of practice</p> <p>Performs a broad range of clinical, technical, managerial or scientific procedures</p> <p>Reviews and develops performance of self and others</p> <p>Shares information effectively and concisely for a range of situations and contexts to ensure citizen safety and continuity of care</p> <p>Develops effective relationships to gather information and deliver care in partnership with citizens and carers</p> <p>Draws on a range of sources in making judgements, guided as necessary by senior colleagues regarding management and delegation to others</p>	<p>Demonstrates an awareness of own values and beliefs</p> <p>Facilitates health enhancing and behaviour change activities</p> <p>Facilitates shared ownership of decision making and supports the delivery of care</p> <p>Recognises the importance of enabling people to do what matters to them</p> <p>Assesses situations and contributes to the identification of the root cause of a problem</p> <p>Develops and implements reflective skills and evidences changes to practice to improve outcomes for citizens, service, profession or organisation</p> <p>Evidences the continued use and development of the skills and behaviours of dignity, compassion and respect in all aspects of care and interactions with others</p> <p>Uses critical thinking, analysis and evaluation in making clinical judgements</p>	<p>Blended learning</p> <p>Will have completed accredited training programme for student supervision</p> <p>Fully comply with all mandatory training requirements</p> <p>Meet professional re-registration needs</p> <p>Professional competency frameworks</p> <p>Professional codes of conduct</p> <p>Shadowing</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Leadership and management</b> <ul style="list-style-type: none"> <li>• Team work and development</li> <li>• Professional and organisational leadership</li> </ul>	<p>Acts as a positive role model</p> <p>Promotes good health and well-being</p> <p>Works independently, planning, organising and prioritising own work, activities and more complex tasks</p> <p>Can work effectively in teams and understands the roles of other members of the team</p> <p>Can communicate clearly and effectively and translate complex professional issues in a lucid way</p> <p>Consolidates own performance and contributes effectively to the delivery of the service</p> <p>Identifies priorities, and manages time and resources effectively to ensure the quality of care is maintained or enhanced</p> <p>Recognises own accountability to act where the performance and practice of self and others should be improved</p> <p>Develop and maintain communication with people about difficult matters and/or in difficult situations</p> <p>Recognises early signs of poor performance and takes appropriate measures</p> <p>Contributes proactively to the aims and organisation of a team</p> <p>Responds autonomously and confidently to complex planned and uncertain situations, managing self and others confidently</p> <p>Emotional resilience</p>	<p>Actively engages in the clinical supervision and appraisal of self and others e.g. support workers</p> <p>Has a responsibility to contribute to administration and management of processes and policies of work area or department</p> <p>Understands the basic concept of leadership and followership</p> <p>Works independently, as well as in teams, to co-ordinate, delegate and supervise care for a designated group of individuals</p> <p>Works effectively across professional and agency boundaries, actively involving and respecting the contribution of others</p> <p>Responsible for aspects of clinical effectiveness and management of resources</p> <p>Identifies unacceptable or unfair treatment of self or colleagues and acts to inform senior colleagues</p> <p>Engages in any required change management</p> <p>Participates in monitoring the effectiveness and impacts of change</p> <p>Builds professional networks, promoting exchange of knowledge, skills and resources in relation to work and health</p> <p>Works within codes of practice and professional guidelines</p> <p>Alerts managers to resource issues that affect learning, development and performance</p>	<p>Contributes to the improvement of services, incorporating the unique contribution of occupational therapy in promoting occupation for health and well-being for everyone</p> <p>Understands own role in identifying and escalating concerns regarding citizen care and dignity</p> <p>Develops clinical leadership behaviours and skills</p> <p>Gives and receives feedback in an open, honest and constructive manner</p> <p>Develops skills in:</p> <ul style="list-style-type: none"> <li>• negotiation</li> <li>• influencing</li> <li>• organisation</li> <li>• problem solving</li> <li>• resource management</li> </ul> <p>Consolidates:</p> <ul style="list-style-type: none"> <li>• critical thinking skills</li> <li>• analytical skills</li> <li>• evaluation skills</li> <li>• interpersonal skills</li> </ul> <p>Blends personal objectives with organisational objectives</p> <p>Understands the organisational employment policies in relation to team performance at work</p> <p>Demonstrates independent critical judgement and an ability to take a leading role in developing critical thinking in others</p>	<p>Management certificate</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Education (facilitation of learning)</b></p> <ul style="list-style-type: none"> <li>• Learning, teaching and assessment</li> <li>• Creation of the learning environment</li> </ul>	<p>Participates and contributes to in-service CPD</p> <p>Is responsible and accountable for keeping up-to-date through continuing personal and professional development and engagement with clinical supervision and mentorship</p> <p>Able to facilitate and evidence self-directed learning and problem solving skills</p> <p>Can evidence understanding of theory and practical application of team working skills, and professional and organisational leadership</p> <p>Supports learning networks</p>	<p>Supports the training of others and contributes to team performance</p> <p>Facilitates students and others to develop their knowledge and competence, using a range of professional and personal development skills</p> <p>Provides education to citizens and families to ensure active involvement in their care</p> <p>Conducts a fair, objective and timely assessment of learners</p> <p>Contributes to the creation of an effective learning environment ensuring facilitation opportunities for students</p> <p>Participates in educational audit</p> <p>Demonstrates application of learning theories that are appropriate for adult and professional learners</p>	<p>Presentation skills</p> <p>Consolidates understanding of theories and principles about humans as occupational beings and of basic learning principles</p> <p>Learns from experience through supervision, feedback, reflective practice techniques and evaluation</p> <p>Motivates, stimulates and encourages others to facilitate the learning process</p> <p>Applies core skills in practice assessment/teaching/facilitation techniques</p> <p>Develops educational materials</p> <p>Understands improvement approaches such as learning audit and appreciative enquiry</p> <p>Uses models of supervision/mentorship</p> <p>Collaboration with relevant higher education institutes for students' learning experience and assessment</p> <p>Demonstrates knowledge and application of curriculum requirements and learning outcomes</p>	<p>Reading professional journals</p> <p>Participating in induction, in-service training, presentation and development opportunities</p> <p>Identifies learning needs through pro-active participation in regular professional supervision, mentoring and reflective practice</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Evidence, research and development</b> <b>• Evidence into practice</b>	<p>Able to formulate research hypotheses</p> <p>Assesses practice</p> <p>Evaluates research outcomes</p> <p>Undertakes desktop research</p> <p>Analyses basic research data</p> <p>Positively questions own and others' practice to create new opportunities to generate new knowledge</p> <p>Assesses own practice and interventions against person-centred outcomes</p> <p>Consolidates understanding and application of different research approaches</p> <p>Demonstrates a critical awareness of the role of research, and an ability to describe and comment on particular aspects of current research</p>	<p>Evaluates equipment techniques and procedures, and makes recommendations</p> <p>Active involvement in clinical audit/surveys</p> <p>Assists in the development of clinical trials or research and development projects</p> <p>Accesses databases about research and evidence, and uses to underpin own practice</p> <p>Identifies ideas for research/development activity from own practice</p> <p>Contributes to data gathering activities such as audit and evaluations</p>	<p>Evidence of research activity</p> <p>Uses research findings to demonstrate the development of practice</p> <p>Maintains and develops research skills</p> <p>Ability to search databases and apply information literacy skills</p> <p>Accesses and applies research to support practice</p> <p>Evidences the development and/or maintenance of basic research skills by applying theory into practice</p> <p>Ability to demonstrate knowledge of:</p> <ul style="list-style-type: none"> <li>• local processes that contribute to quality improvement</li> <li>• research governance – ethics, data protection, confidentiality</li> </ul> <p>Consults with an experienced researcher in relationship to research design and data analysis</p>	<p>Contribute to service evaluation (audit, research, review)</p>

# Experienced practitioner

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## Career framework Level 6

### Generic description of job

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The role will include:

- critical understanding of the unique contribution of occupational therapy in promoting occupation for health and well-being for everyone, knowledge of people as occupational beings
- reviewing and 'rightsizing' care packages i.e. making a case to increase or reduce care packages; planning and implementing programmes to improve people's skills so the level of dependence on carers can be altered
- dealing with more complex manual handling situations
- complex risk assessments (this includes evaluation of carer provision, advising on boundaries of safe practice)
- demonstrating use of equipment and complex techniques to enable carers to maintain care provision
- complex problem solving and dealing with more multifaceted situations, working with people with deteriorating conditions
- dealing with access issues in the community, including long-term care services, residential and domiciliary care
- providing support to students on placement, supervising support workers
- in reablement, assessing suitability for programmes, assessing potential and providing support and advice to colleagues, planning programmes
- facilitating and enabling team development through providing leadership and support to team members
- provides mentoring, supervision and guidance to less experienced staff
- more experienced staff may be required to deputise for line managers and develop their skills in project management.

## Career framework Level 6

People at Level 6 require a critical understanding of detailed theoretical and practical knowledge, are specialist and/or have management and leadership responsibilities. They demonstrate initiative and are creative in finding solutions to problems. They have some responsibility for team performance and service development, and they consistently undertake self-development (Skills for Health).

Experienced practitioners have developed a high level of knowledge and skill in a specific area of practice. They have a depth of knowledge and understanding that enables them to perform at a high level of practice, take a leadership role, use and develop evidence to inform their practice, and deal with complex unpredictable environments. They will have their own caseload or work area responsibilities (Skills for Health).

Level 6 practitioners have a higher degree of autonomy and responsibility than a Level 5 practitioner in the clinical area. The focus of the role is on the development of the more specialised aspects of their profession, while starting to consider career choices and undertaking development opportunities to underpin those career aspirations.

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Professional practice</b> <ul style="list-style-type: none"> <li>• <b>Safe, effective and person-centred care</b></li> <li>• <b>Professional judgement and decision making</b></li> </ul>	<p>Further develops competence and innovation in the management and delivery of care, and interventions appropriate to citizen need</p> <p>Demonstrates mastery and innovation in methods and tools used in a complex and specialised work area</p> <p>Makes judgements involving a range of facts, options, analysis and interpretation</p>	<p>Assumes accountability and responsibility for specific elements of service delivery</p> <p>Works independently, leads work activities of a team or others</p> <p>Works autonomously with freedom to exercise judgement about actions guided by professional accountability and responsibility</p> <p>Provides specialist clinical, technical, managerial or scientific services and advice</p>	<p>Uses detailed theoretical and practical knowledge of a work area involving a critical understanding of theories and concepts</p> <p>Uses theories and principles about the importance of enabling people to do the things they want, need or are expected to do to support their well-being</p> <p>Evaluates own practice and identifies development needs within a complex environment</p>	<p>Evidence of development that includes advanced clinical reasoning and decision making</p> <p>Commences Level 7 education</p> <p>Basic level of skills evidenced in extended scope practice and/or complex care</p> <p>Self and professional development</p> <p>Team manager's development programme</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Professional practice (continued)</b></p> <ul style="list-style-type: none"> <li>• <b>Safe, effective and person-centred care</b></li> <li>• <b>Professional judgement and decision making</b></li> </ul>	<p>Draws on a range of sources in making judgements</p> <p>Manages a team/co-ordinates a group of people and resources in environments that are unpredictable, taking responsibility for decision making in unpredictable work or study contexts</p> <p>Exhibits the skills of advanced clinical decision making</p> <p>Escalates concerns/clinical risk issues appropriately (attribution of risk)</p> <p>Provides evidence that specialist interventions are based on current research</p> <p>Manages complex ethical issues, dilemmas and conflicts</p>	<p>Implements policy and guidance, proposes changes to working practices or procedures</p> <p>Plans complex activities involving liaison with others and/or over a long time period</p> <p>Takes responsibility for the purchasing/maintenance of assets, equipment and/or resources</p> <p>Understands the limits of their professional practice</p> <p>Supports others to incorporate quality improvement processes into practice</p> <p>Incorporates clinical governance into own practice and supports others to do so</p>	<p>Uses the ability to devise and sustain arguments to solve problems and implement solutions</p> <p>Uses ability to conduct interventions, to discharge and to refer on as appropriate</p> <p>Has understanding of and can evidence partnership working</p> <p>Applies specialist knowledge, skills and behaviours appropriate to occupation-centred practice</p> <p>Contributes to the development and review of policies and procedures for own area</p> <p>Appraises and identifies significant aspects in conversations with others and responds appropriately</p> <p>Reflects in practice own values and beliefs, and supports others in ethical decision making</p> <p>Uses critical thinking to explore and analyse evidence, cases and situations in clinical practice</p>	



Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Leadership and management</b> <ul style="list-style-type: none"> <li>• Team work and development</li> <li>• Professional and organisational leadership</li> </ul>	<p>Demonstrates leadership for a work area taking responsibility for managing professional development of individuals and groups</p> <p>Leads work activities of a team or others</p> <p>Promotes teamwork within a defined area of responsibility</p> <p>Encourages staff to contribute ideas and solutions for quality improvement and innovation</p> <p>Actively contributes to a variety of professional networks e.g. managed knowledge networks, professional learning</p> <p>Provides leadership, direction and motivation to achieve the vision and objectives for the area of responsibility</p> <p>Acts to promote a positive climate, good morale and co-operation within the team</p>	<p>Manages others and/or elements of a service area</p> <p>Able to develop and implement effective ways of working in networks across organisation and professional boundaries</p> <p>Develops a wider understanding of organisational and political issues and priorities</p> <p>Understands the wider hierarchy and organisation structures affecting their workplace</p> <p>Contributes to and manages other members of a team by sharing information and expertise</p> <p>Engages in clinical supervision/ preceptorship</p> <p>Act where performance of self and others should be recognised, reported or improved</p> <p>Brings team conflict out into the open and encourages or facilitates a beneficial resolution by responding in a transparent and structured way</p> <p>Engages in the recruitment of professional staff and support workers</p> <p>Engages in professional supervision and reviews profession-specific performance</p>	<p>Develops innovative solutions to service improvement imperatives</p> <p>Takes initiative for instituting small scale service improvement</p> <p>Ability to organise and implement change</p> <p>Supports others to improve and enhance practice</p> <p>Displays creativity and innovation in exploring and implementing possible solutions to problems and evaluate their effectiveness</p> <p>Leads, persuades and influences others effectively</p> <p>Contributes to effective management of a budget in conjunction with others</p> <p>Ability to effectively manage others</p> <p>Is receptive to the contribution of others</p> <p>Implements suggestions for own improvement and that of others</p> <p>Demonstrates clear self-management strategies</p> <p>Supports others in understanding the need for, and making agreed, changes</p> <p>Demonstrates active engagement in developing policy and procedure for own area</p>	<p>Understanding of management of change</p> <p>Understanding of leadership skills</p> <p>All Wales Managers' Passport</p> <p>Development of team members</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Education (facilitation of learning)</b></p> <ul style="list-style-type: none"> <li>• Learning, teaching and assessment</li> <li>• Creation of the learning environment</li> </ul>	<p>Identifies and supports the achievement of the learning needs of individuals/teams in response to service need and personal development planning</p> <p>Consolidates own assessment skills and supports others in making assessment judgements</p> <p>Creates an effective learning environment that ensures learning opportunities for staff and students</p> <p>Uses regular supervision, mentoring and ongoing learning to identify personal learning needs and articulates these to ensure they are met</p> <p>Understands the principles of professional education and development</p>	<p>Plans, organises and delivers learning events</p> <p>Facilitates workshops, conferences, events</p> <p>Evaluates the effectiveness of educational interventions</p> <p>Participates in uni/multi-disciplinary teaching and student selection in HEIs and/or other education organisations</p> <p>Leads/participates in educational audit and learning needs analysis</p> <p>Develops and supports learning networks</p> <p>Facilitates learning and assesses the practice of students and mentors, and supports students and/or colleagues</p> <p>Demonstrates active involvement in training programmes, personal tutoring and assessment of undergraduate students and clinical supervision of more junior staff</p> <p>Evaluates the planning and implementation of specific modules</p>	<p>Actively involved in action learning/research and/or academic research</p> <p>Involved in research papers, posters and publications</p> <p>Consolidates skills to support workplace learning</p> <p>Reflects on practice and supports reflection in others</p> <p>Demonstrates a high level of skill in facilitation, support, supervision and developing learning needs analysis</p> <p>Uses a range of information to review/evaluate the learning environment</p> <p>Demonstrates development and support of a learning culture within the organisation</p> <p>Demonstrates involvement in presentations and seminars with colleagues for shared development</p>	<p>Development of skills in the facilitation of teaching and learning</p> <p>Undertakes appropriate clinical education training</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Evidence, research and development</b> <b>• Evidence into practice</b>	<p>Uses reflective practice</p> <p>Identifies and uses skills and knowledge of staff to support or undertake research-related activity such as audit, evaluation and wider research for the benefit of the organisation</p> <p>Positively questions own and others' practice to create opportunities to generate new knowledge</p> <p>Contributes to the development of guidelines and policy at a local and, where appropriate, a regional and national level</p> <p>Shares research activity findings through local bulletins, team meetings, professional journals</p> <p>Develops a basic understanding of securing grants and college awards</p> <p>Provides evidence that specialist interventions are based on current research</p> <p>Continues to develop own skills by reading others' approach to critique/others' research</p>	<p>Undertakes clinical trials and research projects where this activity is a significant part of the job description</p> <p>Uses research-related approaches to assess how evidence is being used to inform the quality of care of individuals by self and others</p> <p>Observes and records data using appropriate methods, tools and technology for complex audits, or clinical trials or projects</p> <p>Participates in research-related activity including analysis of information</p> <p>Identifies and disseminates information about NHS board/university programmes of research, forums, special interest groups, networks relevant to area of practice</p> <p>Demonstrates involvement in developing and implementing new methods of teaching to reflect changes in research</p>	<p>Ability to understand different research approaches, methods and analysis</p> <p>Adheres to research governance for self and others</p> <p>Supports others to understand audit/evaluation and quality improvement approaches</p> <p>Assists others to access, use and apply evidence from databases relevant to area of practice</p> <p>Demonstrates ability to critically appraise journal articles</p> <p>Demonstrates an ability to submit an abstract/poster for local/national conference</p> <p>Offers contribution to a peer-reviewed journal</p> <p>Applies ethical principles in their own behaviour, treatment of human subjects, and in data reporting</p>	<p>Contributes to/leads service evaluation (audit, research, review)</p>

# Senior practitioner

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## Career framework Level 7

### Generic description of job

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The role will cover various aspects of advanced practice including:

#### Management

- management of staff, including disciplinary, sickness, capability
- service development and providing a strategic overview i.e. understanding and influencing the strategic direction of service and linking with integrated teams, attending partnership meetings to plan new services
- overview of quality standards and addressing skills gaps
- supervising qualified occupational therapists, allocating work/cases and doing personal development plans for junior staff
- deputising for the team manager
- providing second opinions in complex cases, undertaking joint visits as consultancy, and supporting staff to keep increasingly complex cases as those staff develop
- dealing with informal complaints and representation.

#### Clinical

- highly specialised and/or expert knowledge of humans as occupational beings
- expert decision-making skills in occupational therapy within general setting or specialist setting

- managing complex cases and working with people with a complex range of services and interventions (case management)
- providing an occupational therapy service in homes (residential or nursing) with escalating concerns
- safeguarding and investigation management
- preventing escalation e.g. keeping people in their existing home and preventing a move to nursing home care
- manual handling reviews and training advisors
- continuing health care decisions, including providing opinions regarding innovative solutions and complex nursing care
- in housing, identifying accessible housing, allocation determinations and very complex adaptations, working with surveyors, design and building teams
- providing specialist occupational therapy advice for new build specification
- lead projects, pilots, extending scope and innovations such as single handed carer projects, in-reach to health, rehousing and working on ambulances with Welsh Ambulance Services Trust (WAST) keeping people out of A&E (wider care provision, as well as occupational therapy-specific interventions)
- children's services: transition children with complex/life limiting disabilities
- very specialist/bespoke equipment, seating or adaptations
- best interest assessors and approved mental health practitioners (AMHPs).

## Career framework Level 7

People at Level 7 of the career framework have a critical awareness of knowledge issues in the field and at the interface between different fields. They are innovative, and have a responsibility for developing and changing practice and/or services in a complex and unpredictable environment (Skills for Health).

Senior/advanced practitioners are experienced professionals who have developed their skills and theoretical knowledge to a very high standard, performing a highly complex role and continuously developing their practice within a defined field and/or having management responsibilities for a section/small department. They will have their own caseload or work area responsibilities (Skills for Health).

A role requiring a registered practitioner to have acquired an expert knowledge base, complex decision-making skills and clinical competencies for expanded scope of practice, the characteristics of which are shaped by the context in which the individual practices. Demonstrable, relevant master's level education is recommended for entry level (Wales AP document).

Advanced practice should be viewed as a 'level of practice' rather than a specific role and it is not exclusively characterised by the clinical domain, but may also include those working in research, education, management/leadership roles (Wales AP document).

Senior practitioners with a high level of skill and theoretical knowledge who will make high-level clinical decisions and manage their own workload.

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Professional practice</b> <ul style="list-style-type: none"> <li>• Safe, effective and person-centred care</li> <li>• Professional judgement and decision making</li> </ul>	<p>Develops advanced competence, innovation and leadership in the management and delivery of care interventions appropriate to the citizen</p> <p>Demonstrates critical awareness of knowledge issues in the work area and at the interface between different work areas</p> <p>Demonstrates independence in the direction of practice responding appropriately to social, scientific, clinical and ethical issues encountered</p> <p>Clinical governance</p>	<p>Provides specialist clinical, technical, managerial and/or scientific services across a work area involving complex judgements</p> <p>Takes responsibility for a work area, specialist services or clinical pathways</p> <p>Assesses, diagnoses, refers and discharges</p> <p>Assesses situations, identifies the root causes of a complex problem and takes a lead in clinical governance in specific areas of practice</p>	<p>Uses highly specialised theoretical and practical knowledge, some of which is at the forefront of knowledge in occupational therapy, covering a range of procedures and underpinned by relevant broad-based knowledge, experience and competence. This knowledge forms the basis for originality in development and/or applying ideas</p> <p>Decision making/clinical judgement and problem solving</p>	<p>Develops new skills in response to emerging knowledge and techniques</p> <p>Evidences knowledge to master's level qualification in subject area or is working towards one</p> <p>Master's/CQFW level 7 education must underpin all senior practitioner role developments in Wales</p> <p>Achievement at this level may be demonstrated either by academic award, credit, or through mapping portfolio outcomes against the level</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Professional practice (continued)</b></p> <ul style="list-style-type: none"> <li>• <b>Safe, effective and person-centred care</b></li> <li>• <b>Professional judgement and decision making</b></li> </ul>	<p>Promotes respect and supports others to consider the dignity, wishes and beliefs of all citizens involving them in shared decision making</p> <p>Understands the structure of health organisations and policy influencing health and social care</p> <p>Practices autonomously and as part of a team, using advanced knowledge, skills, critical thinking and evidence</p> <p>Developing confidence</p> <p>Demonstrates high levels of reflective and reflexive practice</p> <p>Acts on feedback from citizens and the wider public to inform and improve practice</p> <p>Supports and challenges practitioners about specific aspects of their practice</p>	<p>Leads/participates in a wide range of effective healthcare interventions, including assessment and problem solving, to manage actual or potential risk</p> <p>Promotes and influences others to incorporate values-based care into practice</p> <p>Contributes to strategies and practices that promote service users' and carers' rights and participation in line with their choices, and supports others to do so</p> <p>Contributes to the development of organisational objectives and creates opportunities to involve other practitioners</p> <p>Identifies and shares more complex information effectively and concisely for a range of situations and contexts to ensure citizen safety and continuity of care</p> <p>Works as part of a team with other services and across multi-agency boundaries to access hard to reach groups</p> <p>Identifies trends and changes in the needs of a population, and the effectiveness of meeting those needs</p>	<p>Quickly analyses complex situations, identifying important aspects and taking appropriate action</p> <p>Demonstrates independent critical judgement and an ability to take a leading role in developing critical thinking in others</p> <p>Uses information to make critical decisions</p> <p>Shares and defends own viewpoint succinctly and appropriately in a range of situations</p> <p>Manages complexity</p> <p>Higher level communication skills</p> <p>High level influencing skills</p> <p>Develops advanced psychomotor skills</p> <p>Utilises decision-making mechanisms e.g. committees</p> <p>Involved in clinical networks, communities of practice</p> <p>Applies advanced skills, knowledge and behaviours relevant to specific area of practice</p> <p>Assesses, diagnoses, plans, implements and directs care, interventions and evaluates effectiveness</p> <p>Develops and supports the implementation of policies, protocols and standard operating procedures to reflect national policy and legislation</p> <p>Leads on implementation of organisational clinical governance framework in own area of practice and supports others to use it</p>	<p>Non-medical prescribing</p> <p>Evidences CPD in evidenced-based learning</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Leadership and management</b></p> <ul style="list-style-type: none"> <li>• <b>Team work and development</b></li> <li>• <b>Professional and organisational leadership</b></li> </ul>	<p>Demonstrates leadership and innovation in work contexts that are complex and unpredictable, and require new strategic approaches</p> <p>Solves problems by integrating complex knowledge sources that are sometimes incomplete, and in new and unfamiliar contexts. They will make complex judgements</p> <p>Understanding of self and others</p> <p>Creates a culture of support and empowerment for the team</p> <p>Critically reviews team performance and uses results to enhance person-centred care</p> <p>Acts where performance and practice of self and others should be recognised, reported or improved</p> <p>Leads and monitors clinical effectiveness and efficiency to enhance the management of resources</p> <p>Identifies poor performance and takes responsibility for ensuring appropriate development opportunities are available to address concerns</p> <p>Ensures that organisational goals are reflected in personal and team objectives</p> <p>Takes an active and prominent role in providing direction to staff and others</p> <p>Is proactive and uses initiative when problems arise or progress is slow</p>	<p>Demonstrates experience of managing change within a complex environment</p> <p>Proposes changes to practices or procedures that impact beyond own work area</p> <p>Manages staff and/or services ranging in size and complexity, reviewing and prioritising work activities as necessary</p> <p>Plans and/or organises a broad range of complex activities or programmes with formulation of strategies</p> <p>Identifies the need for change, leading innovation and managing change, including service development and promoting the involvement of others and the impact of the change</p> <p>Monitors the delivery of high quality person-centred care by the team and acts on the results</p> <p>Provides timely feedback to the team that recognises good performance and identifies areas for improvement</p> <p>Participates and influences local (and, where appropriate, national) policy and strategy development by supporting and developing lateral thinking in self and others</p> <p>Involvement in developments in professional practice, and transforming service delivery</p> <p>Provides leadership for a multi-professional team providing direction, motivation and co-ordination to support members to achieve both team and personal work objectives</p>	<p>Makes judgements based on incomplete or limited information</p> <p>Negotiation and influencing skills</p> <p>Can demonstrate high levels of skill in collaboration and communication in teams</p> <p>Applies models of team building and group working</p> <p>Applies workforce and workload assessment tools to build a business case and present evidence for team workforce development</p> <p>Creativity and innovation in exploring and implementing possible solutions</p> <p>Management and leadership skills that contribute to successful change</p> <p>Ability to demonstrate partnership working</p> <p>Shows awareness of the effects of own behaviour on others</p> <p>Develops and implements operational plans for area of responsibility</p> <p>Presents complex information effectively in written and oral reports</p> <p>Assists the organisation to develop and implement policies</p> <p>Provides direction to people to enable, inspire, motivate and support them to achieve what the organisation has set out to do and apply different styles of leadership appropriate to different people and situations</p>	<p>Managing teams and complex care</p> <p>Can demonstrate an understanding of health economics</p> <p>Can demonstrate an understanding of public health issues</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Leadership and management (continued)</b></p> <ul style="list-style-type: none"> <li>• <b>Team work and development</b></li> <li>• <b>Professional and organisational leadership</b></li> </ul>	<p>Demonstrates provision of opportunities for staff to extend and develop their management skills and to undertake appropriate professional development</p> <p>Identifies patterns between current and past situations, points out patterns, trends or missing information to others</p>	<p>Engages in supervision and management of staff</p> <p>Identifies and evaluates areas for potential service improvement</p> <p>Appraises draft policies and strategies for their effect on users and the public, and makes recommendations for improvement</p> <p>Demonstrates capability in financial and equipment management</p>	<p>Facilitates discussions effectively to achieve clear outcomes</p> <p>Shows resilience under pressure and does not let setbacks affect performance</p> <p>Evidences the appraisal of, or manages the appraisal of, staff performance</p> <p>Demonstrates originality in the application of knowledge</p> <p>Demonstrates an ability to develop and implement effective ways of working in networks across organisation and professional boundaries</p>	



Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Education (facilitation of learning)</b></p> <ul style="list-style-type: none"> <li>• Learning, teaching and assessment</li> <li>• Creation of the learning environment</li> </ul>	<p>Principles of teaching and learning</p> <p>Develops service user/carer education materials</p> <p>Builds capability and capacity to support learning in practice settings</p> <p>Creates a positive learning culture through assuring and improving the quality of educational opportunities within the work environment</p> <p>Demonstrates active involvement in training programmes for specialist area</p> <p>Demonstrates active involvement in personal tutoring of undergraduate and postgraduate students</p> <p>Contributes and assists in curriculum development and in reviewing and reforming modules, subjects and programmes at university department and cross-university department level</p> <p>Demonstrates development of assessment to meet the level of requirement and effectively utilising theories of teaching and learning</p> <p>Evidence of effective use of marking strategies at all levels of undergraduate study</p> <p>Demonstrates active involvement in developing others, and enables others to develop and apply their knowledge and skills in practice</p>	<p>Designs, plans, implements and evaluates learning and development programmes</p> <p>Provides advice and support to other practitioners to develop knowledge and skills coaching</p> <p>Engages with education providers to contribute to curriculum development, and delivery and evaluation</p> <p>Takes a lead role in ensuring the application of standards and guidelines that underpin a quality learning experience</p> <p>Analyses the range of factors that influence learning and take account of these when planning and managing learning experiences</p> <p>Advises service/education providers about capability and capacity for student experience in placements</p> <p>Contributes to the development of postgraduate and CPD provision</p> <p>Demonstrates awareness of current educational and social issues</p> <p>Designs programmes to meet training needs of staff</p> <p>Enables others to develop and apply their knowledge and skills</p> <p>Gives specific feedback – positive and corrective – and assesses competency of others so as to delegate full responsibility when they are ready</p>	<p>Acts as an experienced mentor, clinical coach, supervisor</p> <p>Role model, encourages and supports teaching, supervision and mentorship skills in others</p> <p>Acts on intelligence from educational audits to strengthen the workplace as a positive learning environment</p> <p>Understands principles of the learning environment and complex organisations</p> <p>Acts as an experienced work-based learning educator/assessor</p> <p>Develops and facilitates the use of educational materials for students, staff and service users</p> <p>Role model skills in assessment of competence</p> <p>Demonstrates continued involvement and contributions to associated developments in practice</p> <p>Demonstrates collaborative links outside the university with industrial, commercial and public organisations</p> <p>Demonstrates advanced knowledge and application of curriculum requirements and learning objectives</p> <p>Evidences provision of academic support to students, both informally and formally, through the system of progress reviews, and the provision of appropriate and timely feedback on assessments</p> <p>Actively promotes the workplace as a learning environment, encouraging everyone to learn from each other and from external good practice</p> <p>Encourages others to make realistic self-assessments of their application of knowledge and skills, challenging complacency and actions that are not in the interest of the public and/or service users</p>	<p>Facilitating staff development and promotion of the student learning environment</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Evidence, research and development</b></p> <ul style="list-style-type: none"> <li><b>Evidence into practice</b></li> </ul>	<p>Ability to access research/use information systems</p> <p>Be a role model for the wider team by promoting a positive research culture</p> <p>Identifies, promotes and embeds evidence, and identifies impact measures, using findings to enhance future activity</p> <p>Educates others about critical appraisal to reinforce/clarify own skills</p> <p>Communicates own viewpoint succinctly and defends it appropriately</p> <p>Demonstrates active involvement in supervision of undergraduate research activity</p> <p>Provides evidence of peer-reviewed published research and participation at professional conferences and seminars</p>	<p>Horizon scanning</p> <p>Building of the evidence base</p> <p>Contributes to the wider research agenda through initiating or supporting research activity</p> <p>Collates evidence-based reports to inform service improvement</p> <p>Uses the specialised problem solving skills required in research and/or innovation to develop new knowledge and procedures, and to integrate knowledge from different fields</p> <p>Design audit in a specialist field</p> <p>Undertakes ethically approved research</p> <p>Seeks/increases collaboration with other researchers, both within and beyond own area of research interest in UK and beyond</p> <p>Writes research proposals directed at small funding resources</p> <p>Identifies trends and changes in the needs of a population, and the effectiveness of meeting those needs</p> <p>Provides mentorship for novice researchers</p> <p>Teaches or guides others about the implications of research for practice</p> <p>Undertakes personal research projects and actively contributes to the institution's research profile</p>	<p>Demonstrates understanding of research proposal application development, ethical approval process and funding sources</p> <p>Use of understanding of research and information governance to support others in the research processes</p> <p>Critically evaluates data and information with accuracy and perception, and is able to synthesise and use data drawn from a variety of different methods appropriately</p> <p>Ability to implement research findings into practice – including use and development of policies/protocols and guidelines</p> <p>Further enhances knowledge of research approaches, including advanced evaluation methods</p> <p>Demonstrates a comprehensive understanding of techniques applicable to own research</p> <p>Demonstrates successful contribution to a peer-reviewed journal</p> <p>Demonstrates successful submission of an abstract/poster for local/national conference</p> <p>Demonstrates knowledge of the major codes, statements of ethical principles, and laws/regulations that prescribe responsible conduct in research</p> <p>Offers contribution to a peer-reviewed journal</p> <p>Presents research-based reports or summaries at regional and national conferences</p>	<p>Conference presentations</p> <p>Publications</p> <p>Collaborate with HE on research</p>

# Consultant

(also includes service managers and/or people in strategic development or leadership roles)

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## Career framework Level 8

### The job will include:

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- leading on strategy and policy at regional and/or national level in specific areas
- leading on the most advanced and complex occupational therapy practice, consultancy on practice issues, plus education and training for occupational therapy personnel, and/or leading practice-based research and/or development
- accountable for the operational and professional delivery of occupational therapy services within or across organisations
- dealing with formal complaints
- developing, collating and disseminating the evidence to demonstrate the contribution of occupational therapy to the health and well-being of people in the community
- driving forward implementation of legislation and guidance to change and develop practice. Developing the practice of others within and beyond occupational therapy to promote and embed integration.

## Career framework Level 8

People at Level 8 of the career framework require highly specialised knowledge, some of which is at the forefront of knowledge in a field of work, which they use as the basis for original thinking and/or research. They are leaders with considerable responsibility, and the ability to research and analyse complex processes. They have responsibility for service improvement or development. They may have considerable management responsibilities and be accountable for service delivery or have a leading education or commissioning role (Skills for Health).

The consultant practitioner is an expert practitioner with a high level of responsibility and delivery of services. There is a strong element of research within the role. They will carry out research, and may have overall responsibility for the co-ordination of research and development programmes, as well as ensuring that current research findings are used by all staff to inform their practice. The consultant practitioners will lead by example in developing highly innovative solutions to problems based on original research and inquiry. They will apply a highly developed theoretical and practical knowledge over a wide range of clinical, scientific, technical and/or management functions (Skills for Health).

The consultant practitioner is an expert in professional practice, bringing innovation and influence to clinical leadership, as well as strategic direction in a particular field for the benefit of service users/clients. The consultant practitioner would not normally be undertaking day-to-day operational management of services. A consultant practitioner will exercise the highest degree of professional autonomy and decision making, and will work beyond the level of practice of clinical specialists and others with extended or enhanced roles.

The consultant practitioner will play a pivotal role in the integration of research evidence into clinical practice. Exceptional skills and advanced levels of clinical judgement, knowledge and experience will underpin their expertise and ability to promote delivery of the clinical governance agenda. They will do so by enhancing quality in all areas of assessment, diagnosis, management and evaluation, delivering improved outcomes for service users/clients and extending the parameters of their field of practice.

Consultant practitioners will work strategically across a range of models of service delivery, and are expected to influence policy and decision making where the impact is on service users/client outcomes.

While consultant practitioners are autonomous professionals, they must work within ethical, legal and professional frameworks, and remain liable for their actions and omissions as registered practitioners. It is vital that the boundaries of responsibility, autonomy, authority and accountability of the post are clearly defined in any submission for approval (All Wales guidance for the development of consultant practitioner roles).

Staff working at a very high level of expertise and/or have responsibility for planning services.

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Professional practice</b></p> <ul style="list-style-type: none"> <li>• <b>Safe, effective and person-centred care</b></li> <li>• <b>Professional judgement and decision making</b></li> </ul>	<p>Communicates with authority by engaging in critical dialogue with peers in a specialist community</p> <p>Extends and redefines knowledge and/or professional practice within a work area or at the interface between work areas</p> <p>The primary function of expert advanced practice will be central to the role of the consultant practitioner and should involve a minimum of 50 per cent of the consultant's time focused on provision of direct care</p> <p>The expert advanced practice element will involve the consultant practitioner working with citizens and/or communities to provide an exceptionally high level of clinical expertise. They will be able to make critical clinical judgements and decisions in circumstances where a precedent may not exist</p> <p>Manages work of less experienced colleagues and students</p> <p>Mentoring of senior professionals</p> <p>Challenges strategies and practice to promote service users' and carers' rights and participation in line with goals of choice, independence and empowerment</p>	<p>Be expert in one or more service areas</p> <p>Responsibility for management of a complex caseload that must include providing and managing an expert clinical advisory service</p> <p>Responsibility for delivering a whole system citizen-focused approach that incorporates the principles of co-production and shared decision-making</p> <p>Responsibility for ensuring there is adherence to the ethical and moral dimensions of practice</p> <p>Exercises the highest level of professional autonomy, involving complex situations that require analysis and interpretation of information, and making decisions where a precedent may not exist</p> <p>Creates and develops protocols and care pathways with the aim of providing best practice examples to others</p> <p>Ensures that local policies/practice/standards are evidence based to reflect the best available practice</p> <p>Uses a variety of mechanisms to critically examine and evaluate their own practice and performance, including self-reflection and validation by citizens, carers and colleagues.</p> <p>Fulfils a role in clinical governance, providing expert input and working to secure quality improvement across a wide spectrum of care provision</p>	<p>Uses specialised knowledge to critically analyse, evaluate and synthesise new and complex ideas at the most advanced frontier of occupational therapy</p> <p>Depth and breadth of knowledge, skills and expertise within their sphere of practice</p> <p>Promotes and demonstrates best practice</p> <p>Think critically and reflect when making professional judgements including those in the most complex and unpredictable contexts</p> <p>Facilitates integration of research evidence into practice</p> <p>Understands and applies new and emerging guidance and legislation</p> <p>Models and promotes expert level critical thinking to explore and analyse evidence, cases and situations enabling a high level of judgement and decision-making across a range of clinical, service delivery and developmental issues</p> <p>Uses the principles of clinical governance, clinical supervision and clinical audit to lead, manage, and develop the legal and ethical aspects of service development and delivery</p> <p>Exercises expert levels of clinical, operational and strategic decision-making</p> <p>Influences other professions and the wider organisation, including working across organisational boundaries and engaging in inter-agency collaboration</p> <p>Demonstrates visionary thinking and originality in the application of knowledge</p> <p>Interprets national professional policies in terms of specialist area</p>	<p>The nature of a consultant practitioner post requires a portfolio of career-long learning and development. A consultant practitioner must have a minimum of a master's degree. In addition, they should either have published research or have, or be working towards, a doctorate</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Leadership and management</b></p> <ul style="list-style-type: none"> <li>• <b>Team work and development</b></li> <li>• <b>Professional and organisational leadership</b></li> </ul>	<p>Demonstrates substantial leadership, innovation and independence in work contexts that are groundbreaking and require solving problems that involve many interacting factors</p> <p>Exercises a high degree of professional autonomy and acting as an expert resource</p> <p>Influences the development of organisational structures and processes to best suit the needs of citizens</p> <p>Facilitates the development of leadership qualities and management skills in others</p> <p>Provides leadership to influence strategic direction and effective ways of working across professional and organisational teams and boundaries</p> <p>Supports teams in their development by establishing and maintaining networks and sharing information</p> <p>Provides strong and effective leadership across professional and organisational boundaries with a focus on quality improvement and service excellence</p> <p>Monitors and demonstrates how organisational goals are reflected in own and others' objectives</p> <p>Initiates communities of practice/networks to disseminate resources and practice initiatives</p> <p>Demonstrates an ability to manage own workload and that of others within the service area</p>	<p>Ensures all staff within their area of responsibility deliver to the highest standards</p> <p>Is accountable for the delivery of one or more services that actively promotes the rights and responsibilities for self and others in relation to professionalism, health and well-being in the workplace</p> <p>Holds a budget for one or more services</p> <p>Makes and receives direct citizen referrals, undertaking an assessment of individual need and drawing on appropriate interagency and cross-boundary collaboration and expertise to best meet the needs of the citizen</p> <p>Acts as an advocate for citizen community involvement, co-production and empowerment</p> <p>Provides effective leadership and an example that inspires and sustains commitment of colleagues and facilitates empowerment of others</p> <p>Acts as an expert resource for citizen care and decision making</p> <p>Contributes to the strategic review of clinical effectiveness and management of resources</p> <p>Works collaboratively across boundaries to develop and raise awareness of relevant policies, guidelines and strategies, and influence change at a local and national level</p> <p>Identifies and acts on opportunities to influence and develop policy and guidelines at national level</p> <p>Co-ordinates and delegates work, and reviews people's performance</p> <p>Plans, develops, monitors and reviews the recruitment, deployment and management of people</p>	<p>Scrutinises and reflects on social norms and relationships, and leads action to change them</p> <p>Able to challenge existing structures and identify organisational and professional barriers that limit/inhibit services and provide solutions to overcome these</p> <p>Acts as a coach and mentor to a wide range of staff</p> <p>Advanced project planning and management</p> <p>Financial management</p> <p>Impact assessment</p> <p>Development of an outcomes-focused business case</p> <p>Reports effectively for a range of complex situations and contexts</p> <p>Readily uses highly specialised theoretical and practice knowledge to think, gain and share information, solve problems and make decisions</p> <p>Assesses situations and identifies the root cause of a complex problem in environments that are unfamiliar, complex and unpredictable, and have many interacting factors</p> <p>Leads and implements local, national and professional strategy and policy</p> <p>Interprets health information, statistics and research data</p> <p>Undertakes a lead responsibility for managing key aspects of complex change processes</p> <p>Challenges policies, practice and failures in the system</p> <p>Demonstrates application of knowledge and which areas of knowledge need to be transferred to others to achieve organisational goals</p> <p>Prioritises and manages the ongoing work of services and/or projects</p>	<p>Service evaluation (audit, research, review)</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Education (facilitation of learning)</b></p> <ul style="list-style-type: none"> <li>• <b>Learning, teaching and assessment</b></li> <li>• <b>Creation of the learning environment</b></li> </ul>	<p>Contributes to the strategic development of education for students, staff and service users at a local and national level</p> <p>Improves health care practice through evidence-based educational and curriculum development and delivery</p> <p>Promotes motivational ways to influence and optimise learning about humans as occupational beings</p> <p>Uses innovative ways to gather, consolidate and share information, acting as a resource across the organisation</p> <p>Evaluates the impact of educational/training interventions</p> <p>Demonstrates evidence of sustained, successful performance in a major academic, professional or administrative area of responsibility</p> <p>Provides evidence that specialist educational interventions are based on current research</p>	<p>Is responsible for overall delivery of teaching or training programmes</p> <p>Contributes to the development, delivery and evaluation of educational programmes, working collaboratively to ensure appropriate learning opportunities in the clinical environment</p> <p>Leads planning, implementation and evaluation of educational interventions at a local, regional and national level in response to policy and strategy</p> <p>Communicates scholarly activity, research and new developments to support the integration of evidence-based practice within the learning environment</p> <p>Responsibility for facilitating and promoting a learning culture within the organisation, enabling others to develop to their full potential</p> <p>Demonstrates involvement with a professional body at a local, regional or national level</p>	<p>Uses and promotes in others, assessment skills, critical analysis and synthesis of knowledge to enhance care delivery</p> <p>Creates opportunities for motivating others to learn, and develops their teaching and assessment skills across the organisation</p> <p>Influences organisational structures and culture to ensure delivery of continuous education and training for mentors and assessors</p> <p>Promotes and facilitates an active and positive learning environment to enable others to achieve their potential, particularly by encouraging and supporting reflective practice</p> <p>Initiates and provides skilled supervision/coaching of others</p> <p>Influences and implements organisational learning and development strategy in partnership with key stakeholders</p> <p>Evidence of effective use of marking strategies for undergraduate and postgraduate study</p> <p>Challenges complacency and actions that may not be in the best interests of citizens</p>	<p>Leadership and management in complex organisations</p> <p>Development of others</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Evidence, research and development</b> <b>• Evidence into practice</b>	<p>Creates and interprets new knowledge through original research or other advanced scholarship of a quality to satisfy review by peers</p> <p>Supports and encourages the dissemination of good practice, leading by example by seeking to have work published and supporting others in the publication and dissemination of project work results to enhance the service for users and to promote the service</p> <p>Contributes to the development and implementation of a local AHP research strategy</p> <p>Acts as a role model to develop a positive research culture within the AHP community</p> <p>Recognised as a scholar by others through citation</p> <p>Demonstrates effective award-winning research proposals</p> <p>Seeks opportunities to create research assistant posts or PhD studentships</p> <p>Demonstrates the pursuit of opportunities for research, publication and funded consultancy</p>	<p>Researches, conceives, designs and implements projects that lead to new knowledge and new procedural solutions</p> <p>Contributes to local and national guidelines for clinical practice, based on best evidence/research</p> <p>Promotes the development of theory from practice and practice from theory</p> <p>Ensures that high quality citizen services are based on the best available evidence</p> <p>Identifies gaps in the evidence base and communicates findings to appropriate clinical policy and research communities</p> <p>Collaborates with appropriate research partners and builds strategic links with leads for research forums and university programmes of research</p> <p>Initiates, facilitates or undertakes appropriate high quality research, acting as a principal investigator where appropriate</p> <p>Engagement in complex audit</p> <p>Undertakes research designed to address issues or problems in the context of professional practice</p> <p>Secures external funding to support research activities</p> <p>Writes research proposals directed at major funding sources</p>	<p>Generates research ideas relevant to practice and influences the organisation's research and development agenda</p> <p>Understands and supports the use of advanced research methods</p> <p>Understands the responsibilities of a principal investigator, including the functions and processes of ethical and research committees</p> <p>Writes critically, including analysis, synthesis and interpretation of the evidence base to underpin practice</p> <p>Establishes appropriate policies and ensures support for clinical research activity and adherence to research governance</p> <p>Initiates/co-ordinates local/regional/international research programmes</p> <p>Demonstrates successful presentation at local/regional/international conferences</p> <p>Demonstrates national/international profile as keynote speaker</p> <p>Publishes research-based reports in major journals</p> <p>Contributes to the development of theory within own area of study</p> <p>Provides supervision for PhD students</p> <p>Acts as an independent investigator or engages in scholarly activities that will contribute to the development of a body of knowledge relevant to their profession</p>	<p>Research to support organisational development</p>



Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Strategic service development</b>	<p>Makes strategic decisions based on new and complex ideas</p> <p>Carries out operational interactions with strategic decision-making capacity within a complex environment</p> <p>Leads and collaborates on the development of evidence-based protocols</p> <p>Takes the lead in initiating and developing cross-disciplinary services and inter-agency working that contribute to multi-professional standards, guidelines and audit</p> <p>Develops a culture that improves quality</p> <p>Thinks in strategic terms when evaluating own strategic actions against organisation's strategic goals</p>	<p>Develops and influences policy and service developments</p> <p>Directs and influences commissioning/ service provision</p> <p>Contributes to strategic planning and leading local implementation of relevant national policies and strategies</p> <p>Evaluates the provision of clinical services to determine needs, leading to development of new services and/or redesign if indicated</p> <p>Collates and presents statistical information for the purpose of audit and using audit information to inform service developments</p> <p>Uses the principles of prudent medicine, explores opportunities to improve clinical and cost effectiveness of services, working collaboratively to influence allocation of resources to best meet service needs</p> <p>Active involvement in implementing change/s in accordance with new evidence and/or strategic intent</p>	<p>Critically analyses, evaluates and synthesises new and complex ideas and strategic decision-making based on these processes</p> <p>Communicates specialist information about a range of service developments within the organisation and across other providers</p> <p>Engages with service planning and implementation for specialist service</p> <p>Reviews and enhances the organisation's strategic position</p> <p>Establishes strategies to guide the work of the organisation</p> <p>Promotes the organisation and its services to stakeholders</p> <p>Maintains and sustains direction, policies and strategies until they are firmly embedded in the culture inspiring others with values and a vision of the future, while acknowledging traditions and background</p>	<p>Research to support strategic professional and strategic organisational development</p>

# Director of services

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## Career framework Level 9

The job role would be expected to work beyond occupational therapy boundaries and might include:

- director level role in local government (would sit above the team manager)
- regional working and integrating services
- innovate and advance occupational therapy in the wider context
- leading, influencing and informing service delivery for a specified region
- accountable budget holder for specified resources
- accountable and answerable to elected members for service delivery
- accountable officer for governance, performance and quality of service delivered.

## Career framework Level 9

People at Level 9 apply advanced and highly developed theoretical and practical knowledge over a wide range of clinical, scientific, technical and/or management functions. They are the staff with the ultimate responsibility for decision making and full on-call accountability.

They are accountable for ensuring all staff within their area of responsibility have the required skills and knowledge to deliver products of the highest standard and facilitate effective knowledge management to ensure evidence-based practice and quality assurance.

People working at Level 9 require knowledge at the most advanced frontier of the field of work and at the interface between fields. They will have responsibility for the development and delivery of a service to a population at the highest level of the organisation (Skills for Health).

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Professional practice</b> <ul style="list-style-type: none"> <li>• Safe, effective and person-centred care</li> <li>• Professional judgement and decision making</li> </ul>	<p>Communicates the vision across the organisation, motivating and inspiring others</p> <p>Provides guidance to others about governance issues relating to ethical and legal issues</p> <p>Innovates and advances occupational therapy in the wider context</p>	<p>Provides professional, clinical leadership across the organisation to reduce risk and minimise the potential for adverse events</p> <p>Takes the professional lead for the organisation within the context of the current professional and legal frameworks, while remaining accountable for own practice</p>	<p>Ability to translate and lead the implementation of strategy into practice, demonstrating creativity and a vision for the future</p> <p>Acts as a role model and creates a culture that promotes values-based, person-centred care</p> <p>Demonstrates knowledge of the role that communities and others play in improving population health and well-being, and reducing inequalities</p> <p>Ability to interpret and lead implementation of new and current guidance and legislation that governs legal and ethical aspects of the service</p> <p>Uses expert knowledge of clinical governance, legal and ethical issues, and professional codes of conduct to make complex organisational decisions</p>	<p>Professional doctorate</p> <p>Wales/UK groups and fora</p> <p>Executive team development</p> <p>Peer group meetings</p>

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<b>Leadership and management</b> <ul style="list-style-type: none"> <li>• Team work and development</li> <li>• Professional and organisational leadership</li> </ul>	<p>Operates independently, manages department, develops and interprets organisational policies and impact of team performance using workforce intelligence</p> <p>Provides executive level leadership across the organisation</p> <p>Contributes to the setting of organisational goals that are reflected in own, others' and departmental objectives</p> <p>Works collaboratively across organisational boundaries, leading on development, implementation and awareness raising of relevant policies, guidelines and strategies</p> <p>Influences change at a local and national level</p> <p>Identifies and acts on opportunities to influence and develop policy and guidelines</p> <p>Shares NHS AHP expertise with non-NHS organisations</p>	<p>Maximises the potential of the team through the use of recognised workforce planning methodologies and skill mix</p> <p>Leads on the strategic reviews of the clinical effectiveness of services</p> <p>Develops and leads AHP audit and problem solving in an ethical, reflective and evidence-based manner</p> <p>Ensures delivery of a clinically excellent high quality service in own work and across health services</p> <p>Accountable for:</p> <ul style="list-style-type: none"> <li>• clinical and corporate governance</li> <li>• operational and workforce planning</li> <li>• developing effective organisational communication systems</li> </ul> <p>Leads and manages change at an organisational level</p> <p>Monitors the effectiveness and impacts of change</p>	<p>Ability to strategically manage teams by sharing information and expertise</p> <p>Uses specialist knowledge of the unique contribution of occupational therapy in promoting occupation for health and well-being for everyone</p> <p>Uses strategic organisational approaches to increase team effectiveness and outputs</p> <p>Responds and reports effectively for a range of complex situations and contexts</p> <p>Proactively anticipates and manages risk</p> <p>Demonstrates creativity and vision</p> <p>Interprets health information, statistics and research data at an advanced level</p> <p>Writes for publication nationally and internationally</p> <p>Demonstrates expert skills in:</p> <ul style="list-style-type: none"> <li>• change management</li> <li>• leadership</li> <li>• influencing and political lobbying</li> <li>• communication and interpersonal relationships</li> </ul> <p>Presentation of information to wide-ranging audiences</p>	

Pillar of practice	Characteristics	Role responsibility	Knowledge, skills and behaviours	Educational development
<p><b>Education (facilitation of learning)</b></p> <ul style="list-style-type: none"> <li>• Learning, teaching and assessment</li> <li>• Creation of the learning environment</li> </ul>	<p>Generates and operationalises ideas for enhancing the educational direction of the organisation</p> <p>Creates an ethos in the organisation that creates and values a positive learning environment</p>	<p>Provides strategic influence/guidance to support organisational learning and assessment</p> <p>Responsible for organisation adherence to the application of standards and guidelines</p>	<p>Ability to apply standards for ensuring the quality of the educational experience</p> <p>Transforms health care practice through evidence-based educational and curriculum development and delivery</p> <p>Initiates and leads on collaborative working with education providers</p> <p>Leads strategically to create a culture of learning within the organisation</p>	
<p><b>Evidence, research and development</b></p> <ul style="list-style-type: none"> <li>• Evidence into practice</li> </ul>	<p>Contributes the occupation and occupational therapy perspective to the development of the organisation-wide strategy for research and development</p> <p>Provides opportunities for appropriate members of the workforce to participate in programmes of research relevant to practice</p>	<p>Monitors the impact of the AHP research strategy</p> <p>Works with senior colleagues from partner universities to develop shared funding application for research linked to national priorities and programmes of work</p>	<p>Applies advanced knowledge of research governance</p> <p>Develops a research culture within the AHP community by acting as a role model, establishing appropriate policies and ensuring support for clinical-, person- and occupation-centred research activity across the organisation</p>	

# References

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**Health and Care Professional Council Standards for Continuing Professional development [online]**

Available at: [www.hcpc-uk.org/registrants/cpd/standards/](http://www.hcpc-uk.org/registrants/cpd/standards/)

**Royal College of Occupational Therapists Career Development Framework (RCOT 2017)**

Available at: [www.rcot.co.uk/practice-resources/learning-zone/career-development-framework](http://www.rcot.co.uk/practice-resources/learning-zone/career-development-framework)

**Welsh Government/NHS (2016) Modernising Allied Health Professions' Careers in Wales, a post-registration framework**

Available at: [gov.wales/docs/phhs/publications/160926postregistrationframeworken.pdf](http://gov.wales/docs/phhs/publications/160926postregistrationframeworken.pdf)

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