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Primary care manager career development framework

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Background

Evolving primary care environment

In recent years, primary care and the wider health and social care system has gone through a period of rapid change.

One major change for general practice was the introduction of primary care networks (PCNs) in 2019. This change required individual practices to work collaboratively together to deliver services and care at scale for a local population. Each PCN should have a clinical director, who is accountable for working with the network's member practices to deliver the [network contract Direct Enhanced Service \(DES\)](#). PCNs are seen as the building blocks of [integrated care systems](#) and should be the representative link between general practice and the wider system.

One of the most significant aspects of the DES was the introduction of the [Additional Roles Reimbursement Scheme \(ARRS\)](#). This initiative was introduced to enable PCNs to build a diverse workforce to make general practice more resilient and support the delivery of new service specifications. PCNs received funding to recruit a range of direct patient care roles that would work across the network.

There is no 'one size fits all' solution to what primary care management roles should be across practices and networks. This is due to differences, for example, in how a network and its member practices are structured and what the independent and collaborative needs of member practices are for meeting local population health needs.

Common primary care management roles

The information below gives a summary level overview of the main roles and responsibilities in the primary care management workforce. As there is variability in how these roles are structured and used, the specific tasks each role is likely to perform are not covered.

The summary aims to demonstrate that these two roles should provide adaptable support that ensures both strategic and day to day primary care management needs are met.

Table 1: Overview of common roles in the primary care management workforce

Practice manager A well-established role that has been continually evolving. Focused on managing day to day	<ul style="list-style-type: none">• Managing day to day operations• Managing practice workforce (including integration of ARRS workforce)• Business and strategic planning• Implementing processes to achieve deliverables• Patient experience• Working with partners
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<p>operations to deliver patient care.</p>	<ul style="list-style-type: none"> • Working collaboratively with PCN leadership team • Working with provider services • Exceptional problem solvers, high levels of accuracy and intuition • Focus on estates, HR, finance, health and safety, information governance, business planning, monitoring service delivery, reporting • Change management and service improvement • Autonomous decision making and leadership
<p>Primary care network manager</p> <p>An evolving role that has not yet had the opportunity to fully realise its potential due to the pandemic. Focused on working at scale across member practices.</p>	<ul style="list-style-type: none"> • Strategic planning • Project management • Translating contracts to deliverables • Managing groups and organisations • Working with clinical director • Bringing together member practices • working collaboratively with practice managers • Connecting with integrated care boards (ICB) • Change management at scale. • Managing ARRS workforce • Limited company set-up • Collaborative decision-making • Delegated leadership for the clinical director
<p>Other primary care management roles</p>	<p>Specialist roles are emerging to meet the evolving needs of primary care. These include specific business, finance, and HR managers. Several areas have developed strategic or operational director level roles at the PCN level, reflecting the highly specialised skills that are needed to manage changes in primary care. Several managing partners are emerging by progressive practices who recognise the value of combined clinical and non-clinical leadership within their organisation.</p>

Workforce overview

The largest and most established profession in primary care management is the practice manager who traditionally oversees all aspects of the day to day running of general practice businesses. There is a growing recognition of the need to diversify the primary care management workforce to ensure the role of practice manager is realistic and sustainable.

As PCNs have continued to develop, having a mix of specialist and generalist roles can be advantageous, allowing specialists to focus on their area of expertise and generalists to manage operational and strategic priorities. There is also evidence that some practices and PCNs are forming teams (irrespective of organisational legal status), rather than relying on one individual, including the introduction of more junior

staff to enable experienced primary care managers to focus on responsibilities at the top of their capabilities and aid succession planning.

The structure of the primary care management team, the mix of specialist and generalist roles and introduction of more junior roles will be dependent on the size and structure of the PCN member practices and the level of investment by member practices in this workforce. However, it is likely these trends will continue, and general practice should collectively cultivate this workforce to achieve the benefits to the strategic and operational objectives of the PCN.

Using the framework

This framework should be used as guidance and a mechanism for enhancing current offers and identifying the current gaps that could make the difference to supporting primary care managers.

Employers

The framework enables employers to ensure that staff they employ/manage meet core skills and capabilities. It can be used as part of the appraisal process and to review and recognise how core skills and capabilities are shared across teams.

Education and training providers

Education and training providers can use the framework to inform the design of their programmes and the delivery of education and training.

The framework can help to inform those who design and deliver training and development opportunities to focus on the core skills and capabilities that learners need to achieve, maintain and develop.

It should also help to increase consistency in knowledge and skills development and prevent unnecessary duplication in education and training delivery as well as offer better value for money.

Current and future staff

The framework promotes both practice and primary care network roles as career options and progression for a wide range of individuals.

It provides clarity about the core skills and capabilities required and offers stages of progression. It can be used to conduct formal or informal appraisal, alongside a training needs analysis, comparing current skills and knowledge with those required.

Career pathways and skills

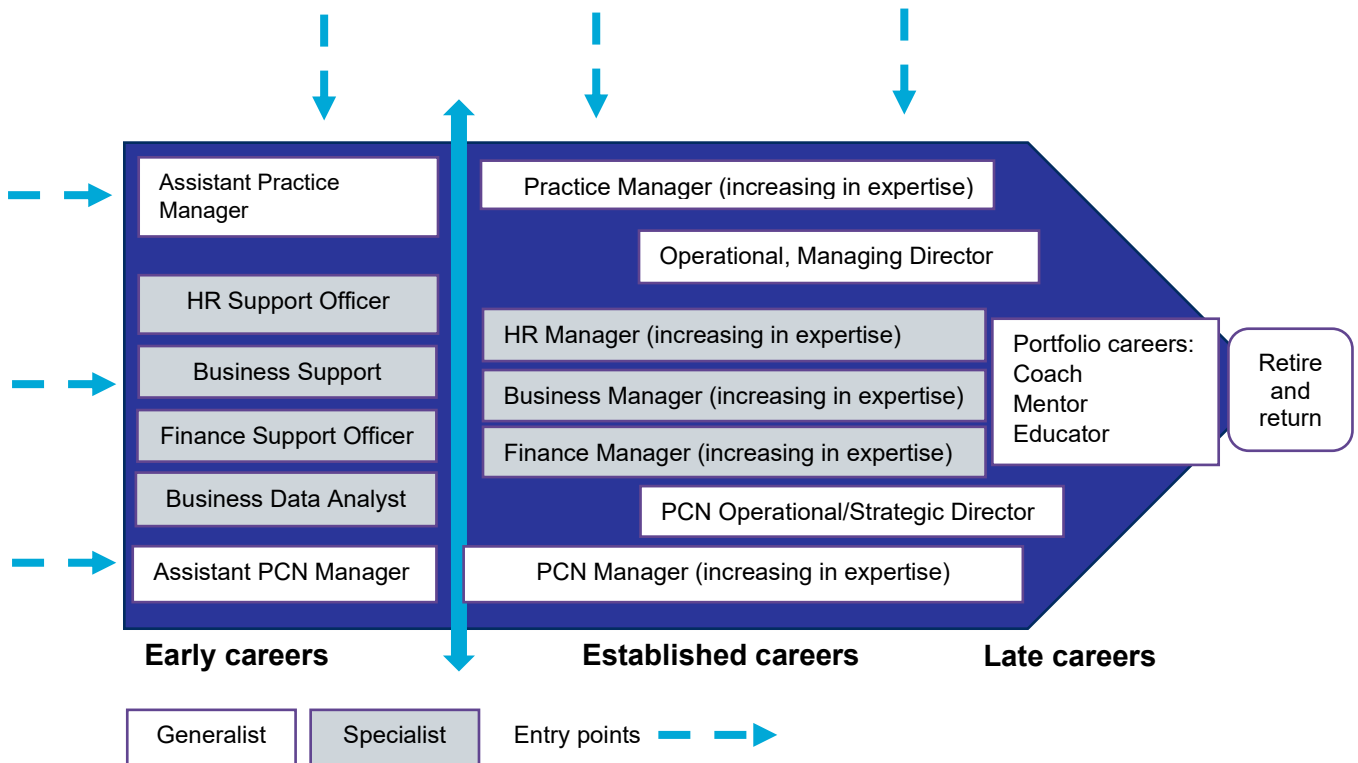
Career pathway

The current primary care management workforce may not mirror diagram 1. There is potential and an increasing trend towards primary care management functions aligning with the roles in the administration and management functions in the wider NHS.

This approach would attract a wider pool of talent that could complement the existing primary care management workforce, while also bringing in new ways of working and a fresh perspective on the challenges faced by general practice. It is not suggested that every PCN or practice has all the roles shown. Instead, it is about having a range of roles and entry points to attract, retain and succession plan for general practice.

Diagram 1: Career Development Framework for future primary care management

Diagram 1 shows the type of roles available at early, established and late career points which can be accessed by talented professionals, both recruited from within or outside the primary care career pathway. Generalist and specialist roles are clearly identified.



Career drivers

A career can be loosely defined as an 'evolving sequence of a person's work experiences over time'. A key part of creating this career development framework is understanding and reflecting what motivates managers in their roles. Some of the key drivers identified are listed below:

- career progression
- passionate about making a difference
- pride in professional identity
- wanting to find solutions to complex problems
- loyalty to general practice
- variety of roles and responsibilities
- wanting to develop future generations of primary care managers
- working autonomously as well as collaborating with others.

Table 2: Overview of common career directions and intentions for primary care managers

Table 2 provides an overview of the most common career directions and intentions developed from the qualitative analysis of workshops (n=120) held with primary care managers during February-March 2022.

Career direction	Outcomes
Moving in	Individuals moving into primary care from outside or moving into management from within understand the primary care landscape and culture and an awareness of the wider health and social care system and its influence on primary care management.
Building up	Individuals are equipped with opportunities to develop their knowledge, skills, and abilities to reach their potential in their current role and have a clear understanding of how to achieve this.
Maintain and refresh	Individuals have access to flexible opportunities to maintain their expertise and refresh on any changes to key areas of practice management. Achieving accreditation/professional registration can be used to provide a career pathway of opportunities as well as to highlight training and development needs to support ongoing professional development.
Moving up	Individuals have a clear understanding of how to progress to the next level of seniority through career planning conversations and action plans access to training and development support to help them
Moving across	Individuals have a clear understanding of any skills gaps they might have for making a lateral career move, for example moving from a specialist to a generalist role or vice versa or moving between a PCN and practice level role. Individuals have access to training and development support to help them
Winding down	Individuals have a clear plan for retirement or reducing their hours to pursue other career goals which includes succession planning. Individuals have access to support to develop portfolio careers or prepare for retirement.
Legacy	Individuals are supported to identify opportunities for creating a legacy and being recognised for their contribution to primary care management. Individuals have access to opportunities to shape future generations of primary care managers.

Core knowledge, skills and abilities

Results from the survey highlighted primary care management roles require both breadth and depth of knowledge, skills, and a high level of technical expertise in core areas. In addition, the roles required an approach that demonstrates high levels of practical and relational skills.

Core areas of technical expertise	Example activities
Day to day operations	Managing clinics, managing appointments, organising duty rota (staff and rooms), monitoring inventory, and ordering stock, opening, and closing, maintaining equipment, managing minimum staffing level, understanding a 'session', local contact lists, succession planning, role of ICB, NHS overall, NHS abbreviations, basic medical understanding additional to terminology
Communications	Keeping up to date with emails, writing briefings for leadership, updating staff on key issues or changes, communicating with patients, managing complaints
Population health management	Understanding population health determinants, conducting audits, and identifying patient cohorts to improve outcomes, where to get and use population health management information (PHM) to support their own role,
Information and technology	Managing systems, hardware, and phones, overseeing digital transformation, overseeing digital patient access, managing patient records, using patient record systems and other systems for financial, HR and service delivery.
Safety and risk management	Health and safety, clinical governance, information governance, safeguarding, infection control, Infection, building reg, fire regulations
Quality assurance and governance	Understanding of quality improvement processes, managing policies and procedures, Care Quality Commission (CQC), meeting targets
Financial management	Budget management - revenue and expenditure, invoicing, financial forecasting, making claims, making business profitable, VAT, insurance. Liability, MPS, various ways of getting income, IIF, claims, CRS, understanding payroll, basic accounting practices
Contract management	Translating contracts to operational deliverables, monitoring contract indicators (QOF, DES, IIF), writing reports, managing staff, understanding GMS/PMS
HR and people development	Recruitment, induction and onboarding, workforce planning, training and development, employment law, contracts, knowledge of provider companies, ARRS
Business/strategic planning	Bid writing, writing business plans, strategic thinking, writing a strategy paper, delivering matrix working, feasibility of projects
Partnership working	Working with partners, working with ICB, working with secondary care providers to improve care pathways
Estates and facilities management	Plan and execute the overall management of property, ensuring that working environment is up to standard, planning space, risk management, rent review, rates reimbursements, CRM1 form, CQC Inspection

Early career

Individuals defined as being in an early career stage in primary care management are defined by their level of experience, knowledge, skills, and abilities that can be applied to the primary care environment.

Individuals tend to be in the first five years of working in primary care management or within the first five years of an equivalent role but transitioning to the ways of working within primary care. On entering the profession, early career individuals are expected to be able to demonstrate an overall foundation level of knowledge, skills and abilities during their first two years in post and will then develop towards an intermediate level.

They must also develop a good understanding of the primary care environment, the wider health and social care system and a basic understanding of how changes in external environment may impact on the day-to-day functioning of the PCN or practice.

Table 3: Knowledge, skills and abilities overview – early career

Practical knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Problem-solving • Organisation and planning • Creativity • Ideation • Adaptability 	<p>Individuals should demonstrate the ability to prioritise competing demands and identified a range of strategies for managing challenges. Individuals should show an openness to new ways of working and ability to change their approach with changes in circumstances. Individuals are working towards autonomous decision-making but seek support from experienced staff as they develop.</p>

Relational knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Social awareness • Communication • Relationship Management • Leadership • Managing others 	<p>Individuals should show an awareness of the needs and expectations of others and demonstrate empathy and regard in their approach to working with others. Individuals should be developing a political awareness and strategies for managing relationships with staff and</p>

	external stakeholders. Individuals are less likely to be in leadership or managerial roles.
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Personal knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Self-awareness • Self-management • Wellbeing • Resilience • Goal-orientated 	<p>Individuals should be developing their abilities to reflect on how they feel, think, and behave in the workplace and identifying self-management strategies to maintain high levels of professionalism. Individuals should demonstrate increased levels of confidence in their abilities and are able to learn from situations that might not go to plan. Individuals should actively identify goals to achieve their development potential.</p>

Table 4: Training and development options - early career

Individuals in the early career stage will need to develop and demonstrate the fundamental skills in primary care management and a good overall level of competency.

Before progressing to the next stage of their career, they will need to develop their confidence, therefore, opportunities to grow in confidence will be essential to their future success.

Training and development	Information
Nationally recognised foundation qualification (portfolio approach)	A recognised national foundation qualification that is delivered in a modular approach to provide the skills needed to meet the core areas of technical expertise. Flexible delivery to allow candidates to complete at their own pace and submit examples of their own practice.
Level 6 Business Administration Apprenticeship	For those that might not have already completed a degree, a degree level business administration apprenticeship would allow candidates to gain a qualification for their future career at the same time as getting hands on experience. This could be developed to align with primary care requirements.
Mentoring programme	Early career individuals are likely to benefit from accessing support from an experienced mentor for at least the first 6-12 months of their experience as they build their confidence and develop their skills.

First5 Network	Like the GP First5 network, early career primary care managers could benefit from having a dedicated support network at a regional or local level, where they can come together to share learning and experiences and would allow for peer mentoring and networking.
Standardised induction and career development plan	A standard induction and career development plan template that could be administered and managed through a platform could support the structured approach that early career individuals require. This could be used to record CPD and learning (could be linked to national qualification).
Understanding primary care and the wider system training	Any 'new to primary care' training should provide an overview of the primary care landscape, an overview of the roles, an overview of the difference between PCN and practice level delivery and an overview of the wider system (ICB). Delivered at a local level.
Shadowing and increased responsibilities	As part of the structured induction and career development plan, practices and PCNs should be actively identifying opportunities for early career individuals to shadow and observe a range of professionals and identify opportunities for developed increased levels of responsibility.

Career development

Table 5: Overview of career development - early career

The table below outlines how the career directions, interventions and learning outcomes are linked for early career professionals. The table should be used by professionals, their employers, and wider stakeholders to identify development gaps and what types of support will aid the individual to meet their career goals.

Career directions	Proposed interventions	Learning outcomes
Moving in	Introduction to primary care and the wider system training	Building knowledge: <ul style="list-style-type: none"> • understanding the primary care landscape and wider system • understanding the fundamentals of primary care management

Moving in	Standardised induction and career development plan	Early support: <ul style="list-style-type: none"> • socialisation and integration to the workplace and wider system • opportunities for gaining experience.
Building up	Nationally Recognised Foundation Qualification (portfolio approach)	Meeting minimum standards: <ul style="list-style-type: none"> • developing technical expertise across the core elements of primary care management • developing practical skills in management.
Building up	Mentoring Programme PCM First5 Network	Building confidence: <ul style="list-style-type: none"> • developing confidence in abilities • developing relational and personal skills.
Moving up and across	Level 6 Business Administration Apprenticeship	Ensuring standards for next steps: <ul style="list-style-type: none"> • Qualification at level 6
Moving up and across	Mentoring programme	Psychological readiness for progression: <ul style="list-style-type: none"> • Exploration and readiness for career change
Moving up and across	Shadowing and increased responsibilities	Meeting standards for next steps: <ul style="list-style-type: none"> • Gaining experience in skills gaps

Established career

Most primary care managers will fall into the established career stage, which is the broadest stage, covering a wide range of opportunities for development.

Individuals at this stage are likely to have five or more years of relevant experience working in an operational or management role but not necessarily within Primary Care. There continues to be an increase in the talent pipeline of experienced individuals from other sectors with more strategic level experience.

Practical knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Problem-solving • Organisation and planning • Creativity • Ideation • Adaptability 	Individuals demonstrate a high effectiveness in anticipating and mitigating problems that may arise during their day-to-day activities. They can manage an array of complex and demanding prioritise with ease. Individuals are actively identifying and or implementing new ways of working. They are adaptable with aptitude for both proactive and reactive responses. Individuals are trusted to work autonomously.

Relational knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Social awareness • Communication • Relationship Management • Leadership • Managing others 	Individuals demonstrate a high level of awareness of the needs of others and empathetic and able to build rapport with ease. Individuals have a good political awareness and can influence and negotiate when working with others. Individuals are likely to manage others and ensure that they are performing effectively in their roles. Individuals are also likely to hold a leadership position.

Personal knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Self-awareness • Self-management • Wellbeing • Resilience 	Individuals should have a good level of self-awareness and self-management strategies offering a high level of professionalism. Individuals show a good

<ul style="list-style-type: none"> • Goal-orientated 	<p>level of confidence in their abilities and reflect and learn on their approach to working with others. Individuals demonstrate a high regard for maintaining their wellbeing and are resilient in high pressured environments. Individuals are good at setting and achieving goals.</p>
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Table 6: Training and development options - established career

Nationally recognised advanced qualification (portfolio approach)	A recognised national advanced qualification that is delivered in a modular flexible approach to provide opportunities to develop an advanced level of expertise.
Level 7 specialist apprenticeships	For those that might want to specialise in a specific areas of primary care management. It would allow individuals to build advanced expertise and applying it directly to the working environment.
Coaching programme	Access to coaching would benefit individuals who are looking to work on specific aspects of their expertise or for making career decisions or transitions.
Primary Care Managers Network (local and national)	Access to a single platform and forum for share learning, templates or materials would offer a repository for primary care managers to connect nationally but also to develop local networks.
Mentoring programme	Established career Individuals are likely to also benefit from accessing support from someone who has made similar experiences or have made a career transition that the individual is contemplating.
Portfolio career opportunities	Established individuals could enhance their skills and experiences by exploring portfolio opportunities e.g., quality and innovation projects, data and research, supervising, leadership, or subject matter expert roles.
Career planning templates and workshops	Whilst organisations may take more responsibility for early career individuals, established individuals are likely to have more responsibility for self-managing their careers. Support with career planning through workshops would be beneficial.
Refresher/updates training	Many primary care managers would benefit from having a regular programme of targeted, specific training on core and new developments in primary

	career management e.g., changes to contracts and how to translate to core deliverables.
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Career development

Table 7: Overview of career development - established career

The table below outlines how the career directions, interventions and learning outcomes are linked for established career professionals. This table should be used by professionals, their employers, and wider stakeholders to identify development gaps and what types of support will aid the individual to meet their career goals.

Career directions	Proposed interventions	Learning outcomes
Moving in	<ul style="list-style-type: none"> • Introduction to primary care and the wider system training • PCM First 5 Network (new to primary care) 	<p>Translating knowledge, skills, and abilities to primary care:</p> <ul style="list-style-type: none"> • practical application of skills to primary care • understanding the primary care landscape and wider system • understanding the fundamentals of primary care management.
Building up	<ul style="list-style-type: none"> • Nationally recognised advanced qualification (portfolio approach) • Level 7 specialist apprenticeships 	<p>Advanced level of expertise:</p> <ul style="list-style-type: none"> • leading on complex technical aspects of the role • innovation and quality improvement • increased relational and personal attributes
Maintaining	<ul style="list-style-type: none"> • Refresher/updates training and drop-in sessions 	<p>Maintaining knowledge, skills and abilities:</p> <ul style="list-style-type: none"> • keeping up to date with changes to ways of working • keeping up to date with policy, contracts etc.
Maintaining	<ul style="list-style-type: none"> • Primary Care Managers Network 	<p>Connecting and sharing learning:</p> <ul style="list-style-type: none"> • offering and receiving informal support from peers and action learning sets to tackle shared issues.
Moving up or across	<ul style="list-style-type: none"> • Coaching or mentoring 	<p>Ensuring standards for next steps:</p>

	<p>programme (as a recipient or coach or mentor)</p> <ul style="list-style-type: none"> • Career planning templates and workshops • Portfolio career opportunities 	<ul style="list-style-type: none"> • gaining experience in skills gaps • exploration and readiness for career change.
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Late career

Table 8: Knowledge, skills and abilities overview – late career

Practical knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Problem-solving • Organisation and planning • Creativity • Ideation • Adaptability 	<p>Individuals demonstrate a high effectiveness in anticipating and mitigating problems that may arise during their day-to-day activities. They can manage an array of complex and demanding prioritise with ease. Individuals are actively identifying and or implementing new ways of working. They are adaptable with aptitude for both proactive and reactive responses. Individuals are trusted to work autonomously.</p>

Relational knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Social awareness • Communication • Relationship Management • Leadership • Managing others 	<p>Individuals demonstrate a high level of awareness of the needs of others and empathetic and able to build rapport with ease. Individuals have a good political awareness and can influence and negotiate when working with others. Individuals are likely to manage others and ensure that they are performing effectively in their roles. Individuals are also likely to hold a leadership position.</p>

Personal knowledge, skills and abilities

Overall level of development	Foundation > Intermediate
<ul style="list-style-type: none"> • Self-awareness • Self-management • Wellbeing • Resilience • Goal-orientated 	<p>Individuals should have a good level of self-awareness and self-management strategies offering a high level of professionalism.</p> <p>Individuals show a good level of confidence in their abilities and reflect and learn on their approach to working with others. Individuals demonstrate a high regard for maintaining their wellbeing and are resilient in high pressured environments. Individuals are good at setting and achieving goals.</p>

Table 9: Training and development options - late career

Education and training design and delivery	Professionals could work collaboratively with training and education professionals to ensure content is specific to the needs of primary care managers and can bring this to life through participating in training.
Education supervisor	Professionals could be trained to be education supervisors for primary care managers who are completing the national qualification or apprenticeship opportunities and be able to assess individuals progress against minimum standards.
Coach/ Coach supervisor	Professionals could complete level 5 or level 7 coaching qualifications to support a coaching programme for primary care managers and other primary care professionals. This will also require the increase individuals able to offer coaching supervision.
Mentor	Professionals could be trained to be mentors for early career primary care managers and support them to upskill and navigate working at a practice or PCN level.
Flexible working options	As professionals start winding down or want to require their options, there will need to opportunities to work flexibility which could include working on specific projects or to cover leave for practices or PCNs which could be accessed through a flexible working platform.
Retire and return	Professionals will need support to prepare for retirement. Development of retirement guidance and planning templates could support a standardised approach. This could include options for returning to participate in other opportunities described.
Portfolio career opportunities	Professionals could enhance their experiences by exploring portfolio opportunities e.g., quality and

	innovation projects, data and research, supervising, leadership, or subject matter expert roles
Leadership positions	Professionals could influence the shape and development of primary care management through opportunities to advocate and be part of national, regional, or local decision making. This could include roles in the ICB to represent primary care priorities.

Career development

Career directions	Proposed interventions	Learning outcomes
Maintaining	<ul style="list-style-type: none"> • Refresher/updates training and drop-in sessions 	Maintaining knowledge, skills, and abilities: <ul style="list-style-type: none"> • keeping up to date with changes to ways of working • keeping up to date with policy, contracts etc.
Maintaining	<ul style="list-style-type: none"> • Primary Care Managers Network 	Connecting and sharing learning: <ul style="list-style-type: none"> • offering and receiving informal support from peers and action learning sets to tackle shared issues.
Moving up or across	<ul style="list-style-type: none"> • Coaching or mentoring programme (coach or mentor) • Career planning templates and workshops • Portfolio career opportunities 	Ensuring standards for next steps: <ul style="list-style-type: none"> • gaining experience in skills gaps • exploration and readiness for career change.
Winding down	<ul style="list-style-type: none"> • Retire and return • Flexible working options (project specific) 	Preparing for next steps: <ul style="list-style-type: none"> • preparing self for retirement • preparing others for your retirement.
Legacy	<ul style="list-style-type: none"> • Involved in education and training design and delivery • Education supervisor • Coach and coach supervisor 	Influencing the future of the profession: <ul style="list-style-type: none"> • supporting organisational and local succession planning • supporting education of early and established career professionals.

Acknowledgements

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- South, Central and West Commissioning Support Unit
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- Institute of General Practice Management
- National Association of Primary Care
- NHS Confederation
- Practice Managers Association
- Royal College of General Practitioners