

Pre EOI Trailblazer Investigations for Porters/Housekeepers/Ward Clerks

Executive Summary

Health Education England asked Skills for Health to investigate into whether the roles of Porter, Housekeeper and Ward Clerk meet the requirements for Apprenticeship Standard development. Pre-Expression of Interest (EOI) investigations were carried out to ensure any new Standard development does not significantly overlap with any other existing Standard, or Standard in development and that there is employer support for any proposed new Standard development.

A questionnaire (Appendix 1) on each job role and its suitability for Apprenticeship Standard development, was drafted and sent out to all employers who had expressed an interest in the development of new Standards for these roles.

Twelve completed questionnaires were returned from employers, 4 relating to Housekeepers, 5 to Porters and 3 to Ward Clerks.

At this present time, from the findings of the investigations, it is not clear that the three occupations would meet the DFE criteria for Apprenticeship standard development, specifically:

- being an occupation that requires a minimum of 12 months development
- being an occupation requiring at least 20% off the job learning
- having a minimum of 10 employers across the country willing to support the development of a new Standard

For employers who wish to develop employees in these roles using an Apprenticeship however, there are other existing Apprenticeship Standards or Standards in development which may be suitable. These include Customer Service Practitioner, Business Administrator, Hospitality Team Member and Cleaning and Support Services (in development).

The recommendation following this investigation would be to use the Apprenticeship Standards that already exist to train Porters, Housekeepers, and Ward Clerks as Apprentices if employers wish to develop their employees via an Apprenticeship, unless further evidence is forthcoming from employers in the near future.

1. Aims of Investigation

The aims of this investigation are to:

- investigate the suitability of Apprenticeship Standards for the roles of Porter, Housekeeper and Ward Clerk
- explore the scope of the roles of Porter, Housekeeper and Ward Clerk
- determine whether there is employer support for the development of new Apprenticeship Standards for these roles
- conclude whether the role of Porter, Housekeeper and Ward Clerk are provided for by existing Standards, or whether there are gaps, and therefore whether new Apprenticeship Standard provision is required and an Expression of Interest (EOI) should be drafted

2. Background

Health Education England have contracted with Skills for Health to take on the 'strategic overview' of Apprenticeship development in Health. To fulfill this remit, Skills for Health now receives all the enquiries from employers and others, regarding interest in new Standard development. Skills for Health manage a 'log of interest' and are therefore able to advise Health Education England which roles employers are keen to be developed into an Apprenticeship Standard.

Health Education England has asked Skills for Health to investigate into whether the roles of Porter, Housekeeper and Ward Clerk meet the requirements for Apprenticeship Standard development. Pre-Expression of Interest (EOI) investigations have been carried out to ensure any new Standard development does not significantly overlap with any other existing Standard, or Standard in development and that there is employer support for any proposed new Standard development.

2.1 Requirements for Apprenticeship Standard Development

For a job role to 'meet the requirements' for Apprenticeship Standard development, it must meet the Department for Education's criteria for approval following an Expression of Interest submission. This will include:

- being a distinct occupation that can be easily defined and agreed upon
- not significantly overlapping with other occupations that are defined in an Apprenticeship Standard or Standard in development
- being an occupation that requires a minimum of 12 months development
- being an occupation requiring at least 20% off the job learning
- having a minimum of 10 employers across the country willing to support the development of a new Standard

3. Methodology

To carry out this investigation, e-mails were sent to all employers who have been 'logged' as registering an interest in Apprenticeship development, for the roles of Porter, Housekeeper and Ward Clerk, to confirm their involvement in the investigations. The Steering Groups of the Healthcare Support Worker and Allied Professionals Trailblazer Groups were also e-mailed to establish whether any members wished to contribute to the investigative work.

A questionnaire (Appendix 1) on each job role and its suitability for Apprenticeship Standard development, was drafted and sent out to all employers who had expressed an interest (see Contacts Section 6). Employers were asked to complete a separate questionnaire for each job role and to send in current job descriptions for the three roles under investigation. Employers were offered the option to complete the questionnaire over the phone to enable further discussion.

4. Findings

4.1 Questionnaire and Job Description Returns

Twelve completed questionnaires were returned from employers, 4 relating to Housekeepers, 5 to Porters and 3 to Ward Clerks. Eight job descriptions were returned, one for the role of Housekeeper, 2 for Porters and 5 that were thought to relate to the Ward Clerk position.

4.2 Scope of Roles

Information on the scope of each of the three roles can be found in Appendix 2

4.3 Questionnaire Feedback

4.3.1 Porter Feedback

Five questionnaires were completed for the role of Porter. This job role usually has the title Porter but may be combined to be Porter/Driver. There was a lack of consistency in the responses to the question regarding the time it would take to train a new entrant to become competent in this profession. Responses included 'less than one month', '1-3 months', '6-12 months' and 'don't know'. Training of current Porters tends to be on the job following local mandatory/induction training. In one Trust, some porters have gone through a one year, level 2 Facilities Management Apprenticeship. Most respondents thought that, if there were to be an Apprenticeship for Porters, it should be at academic level 2. In response to the question regarding whether 20% of the required training would be 'off the job', one respondent replied 'yes', 3 'no' and one 'no but would do if on an Apprenticeship'.

4.3.2 Housekeeper Feedback

Four questionnaires were completed for the role of Housekeeper. In response to the question about how long it takes to train a new entrant to become competent, answers varied from '3-6 months', to '6-12 months' with one respondent saying 'don't know'. Current training and education for Housekeepers includes mainly on the job training with some off the job training and for some Trusts includes completion of the Care Certificate. In one Trust, Housekeepers have undergone the current Support Services Apprenticeship Framework. Respondents were agreed that any potential new Apprenticeship Standard should be at academic level 2. One respondent highlighted that Apprenticeship Standards in Cleaning and Support Services have been approved for development and that these may be applicable to Housekeepers. In response to the question about whether 20% of the required training would be 'off the job', two respondents answered 'yes', one 'no' and one 'no but would do if on an Apprenticeship'.

4.3.3 Ward Clerk Feedback

Three questionnaires were completed for the role of Ward Clerk. When asked whether 'this occupation is known by a different job title in your organization', respondents answered yes 'medical secretary' and 'medical administrator'. There were a variety of responses to the question regarding the length of time it would take to train a new entrant to become competent, from '3-6 months' to '12-24 months' and one respondent answering 'don't know'. Current education and training was described as 'on the job' or 'in house'. Two respondents agreed that any Apprenticeship should be at level 2, with one suggesting levels 2/3/4/5. In response to the question about whether 20% of the required training would be 'off the job', two respondents said 'no' and one 'yes'.

5. Conclusion

In assessing whether the roles of Porter, Housekeeper and Ward Clerk 'meet the requirements' for Apprenticeship Standard development, it was necessary to see how far, in the case of each role, it goes towards meeting the Department for Education's (DFE) criteria for approval following an Expression of Interest submission, as listed in section 2.1 Requirements for Apprenticeship Standard Development.

There is not yet evidence that there is a minimum of 10 employers across the country, in the case of each job role, who would be willing to support the development of a new Standard. In the cases of the Porter and Housekeeper roles, there does appear to be a distinct occupation that can be easily defined and agreed upon, however the role of a Ward Clerk does not appear to be as easily defined, since a range of job descriptions, with different job titles and activities, were supplied by employers.

When examining the questionnaire responses regarding how long it would take to train a new entrant to become competent in the occupation, the answers given indicate that the majority of employers think it could take less than 12 months for each job role, with a couple of exceptions. This would need exploring further if an Expression of Interest were to be developed for these job roles, as the DFE criteria for Apprenticeship standards need an occupation to require a minimum of 12 months development.

The responses for the question regarding whether a minimum of 20% off the job learning would be required for the training period for each occupation also indicated that most employers thought this would not be required for these three job roles, with exceptions from a minority of employers.

At this present time, it does not appear that the three occupations under investigation would meet the DFE criteria for Apprenticeship standard development. For employers who wish to develop employees in these roles using an Apprenticeship however, there are other existing Apprenticeship Standards or Standards in development which may be suitable. These include Customer Service Practitioner, Business Administrator, Hospitality Team Member and Cleaning and Support Services (in development).

The recommendation following this investigation would be to use the Apprenticeship Standards that already exist to train Porters, Housekeepers, and Ward Clerks as Apprentices if employers wish to develop their employees via an Apprenticeship, unless further evidence is forthcoming from employers in the near future.

6. Contacts

The list of contacts below all registered an interest in Apprenticeship development for the roles of Porter, Housekeeper and Ward Clerk

Name	Organisation
Kay Butterfield	Leeds Teaching Hospital
Stephanie Smith	Sunderland Teaching Hospitals
Anna Smith	A logical Ltd
Darren Avery	Great Ormond Street Hospital for Children NHS Trust
Jane Hadfield	North Bristol Trust
Sue Crew	North Bristol Trust
Catherine (Cat) Rocks	Royal Devon and Exeter NHS Foundation Trust
Anne-Marie Varney	Central Manchester University Hospitals NHS Foundation Trust
Carly Bainbridge	Central Manchester University Hospitals NHS Foundation Trust (Saint Mary's Hospital)
Kerry Hill	Central Manchester University Hospitals NHS Foundation Trust-Soft Services Manager
Simon Jarvis	University Hospitals Birmingham

Katie Squire	University Hospitals Birmingham
Carolyn Pitt	University Hospitals Birmingham
Mandy Piper Killick	St Christopher's Hospice
Sally Garbett	St Christopher's Hospice
Lorraine Larman	LCCSS
Paul Shirley	Burton Hospitals NHS Foundation Trust
Lynn Weston	Black Country Partnership Foundation Trust
Lorraine Davies	The Pennine Acute Hospitals NHS Trust
Annie Dixon	Pennine Care Foundation NHS Trust
Gill Clark	Stockport NHS Foundation Trust

Appendix 1

Porter/Housekeeper/Ward Clerk Apprenticeship Standard Pre-Development Questionnaire

Some employers have registered an interest in having new Apprenticeship Standards for the roles of Porter, Housekeeper and Ward Clerk. To help us gauge demand and the feasibility of developing new standards in these areas, we would be very grateful if you could take some time to complete this questionnaire by 24th January 2017

Please could you use a separate form for each role that you wish to comment on?

1. The name of the occupation:	Porter Housekeeper Ward Clerk
2. Is this occupation known by a different job title in your organisation? If so what?	
3. Is there/are there (a) named professional bodies union(s) that represent(s) this occupation?	Yes No
4. If you answered 'yes' to Q 5 please give details	
5. How many people are recruited by your organisation to this occupation per year?	1-10 10-50 50-100 100-250 250-500 500+ I don't know
6. How long does it currently takes to train a new entrant to become competent in this occupation?	Less than 1 month 1-3 months 3-6 months 6-12 months 12-24 months 24-36 months 36+ months I don't know
7. Describe current education and training arrangements for this occupation. E.g. How long does the training last for? Is the training on or off the job? Does the training include completion of an accredited qualification? What level is the education and training at?	

8. The apprenticeship will/should be at academic level:	1 2 3 4 5 6 7 8 I don't know
9. I have a typical job description. If 'yes' please attach the job description(s) along with the questionnaire reply	Yes No
10. If there is not a typical job description you can send in for this occupation, can you outline the main tasks that would be carried out?	
11. Other apprenticeship standards, applicable to this occupation, are in development/available. Please check at https://www.gov.uk/government/collections/apprenticeship-standards	Yes No
12. If you answered 'yes' to Q7, which Apprenticeship standards do you consider may be applicable to this role? (Please give details)	
13. During the training period, this occupation requires a minimum of 20% off the job learning (i.e. equivalent to 1 day per week off the job)	Yes No
14. My organisation would be willing to be publicly named in an expression of interest of development of a new Apprenticeship standard to the Department of Education	Yes No
15. If accepted for new standard development, my organisation would be willing to work with other employers to develop the new Apprenticeship standard for this occupation	Yes No

Appendix 2-Scope of Roles

Porter-Scope of Role

The NHS Health Careers web site describes what an individual may do as a Porter in the following way:

As a porter, you could be moving

- patients on trolleys or in wheelchairs
- stores and equipment
- samples of patients' blood
- linens
- post and parcels
- waste
- cylinders of gas
- trolleys of food and drink

Depending on where you work in a hospital, you may have other duties including

- cleaning and tidying outside areas and gritting in cold weather
- cleaning indoors
- replacing curtains round beds in wards

(Taken from <https://www.healthcareers.nhs.uk/explore-roles/support-services/porter> on 09/02/17)

The description below of the main duties of a Porter has been compiled from the job descriptions and information that was sent in by respondents to the questionnaire.

Patients:

Assist with moving and handling of patients on all wards and departments.

Waste and Linen:

Collect, remove and transport of all waste and linen items. Ensure waste and linen storage area are kept safe, clean, tidy and secure. Receive linen deliveries and ensure they are correctly receipted. Carry out a daily count of linen delivered from the contract laundry. To check the clean linen received for quality. Load linen trolleys with clean linen and distribute to wards and departments according to requirements.

Post and Parcels:

Assist with the sorting of internal and external mail, delivery of mail to wards and departments. Ensure mail in transport remains secure and confidential. Collect post, parcels, case notes, request forms, pathology reports and other items and deliver them to the correct destination. Frank external mail ensuring correct date and payment; ensure or recorded mail is stored securely and signed for.

Pharmacy and Medical products:

Assist with the collection and delivery of all types of pharmacy products, specimens, medical gases. Supply medical gases to wards and departments, exchanging and connecting cylinders as required. When on Pharmacy Porter duties collect and deliver medicines (including controlled drugs).

Catering:

Delivery of all types of catering items, trolleys of food and drink

Moving Stock and Non Stock:

Move case request forms. Assist with the delivery of stock and non-stock items to all wards and departments e.g. equipment, consumables, case notes, specimens, medicines, equipment, furniture and other items between wards and departments in line with agreed procedures.

Operation of equipment:

Operate the Porter's electric vehicles in a safe manner in line with agreed procedures. Operate waste disposal machinery in line with agreed procedures. Operate any communications equipment which may be in use – e.g. telephones, pagers and two-way radios. Routinely return wheelchairs, trolleys and other equipment to correct storage areas and check that they are in safe working order.

Cleaning:

When on out-of-hours shift: undertake whatever range of cleaning duties is required –i.e. corridor cleaning, terminal clean of barrier rooms, theatres – in line with work schedules and procedures.

Spread grit and salt and clear pathways in the event of adverse weather. Clean wheelchairs and trolleys as require

Housekeeper-Scope of Role

The NHS Health Careers web site describes what an individual may do as a Housekeeper in the following way:

As a housekeeper, you will coordinate non-clinical ward services such as catering, cleaning, equipment and supplies. The work can include:

- talking to and reassuring patients
- ordering non-clinical supplies
- keeping the ward clean and tidy
- serving and clearing away meals
- preparing snacks and drinks
- reporting faults
- clerical and admin tasks
- ordering patient transport
- receiving visitors

With additional training, you may work with patients, taking on some of the duties of a healthcare assistant such as feeding patients, taking and recording blood pressure, temperature



(Taken from <https://www.healthcareers.nhs.uk/explore-roles/domestic-services/housekeeper> on 09/02/17)

The description below of the main duties of a Housekeeper has been compiled from the job description and information that was sent in by respondents to the questionnaire.

Cleaning:

Maintain a high standard of cleanliness within the ward area in particular, and in all other areas in general by:

- Cleaning all equipment after use
- Cleaning the bed areas after a patient has been discharged
- On a rotational basis, clean all trolleys and their associated equipment
- Cleaning the 'clean room' weekly
- Cleaning the sluice daily

Equipment:

Ensure all equipment is clean and in good working order by:

- Ensuring faulty medical equipment is taken for repair
- Ensuring that all equipment is repaired and returned promptly to the ward/department
- Reporting general maintenance faults to the estates department
- Liaise with the estates department to ensure timely repair or replacement of faults/breakdowns reporting faults

Supplies and Stock:

- Maintain a high standard of stock control
- Bring to the attention of the ward/manager, any slow moving stock or stock run out of, so stock levels can be adjusted accordingly
- Manage any shortfalls in the order, and bring to the attention of the ward /department manager any such shortfalls that cannot be managed
- Liaise with supplies department to ensure ordering and delivery of the supplies is of a satisfactory standard
- Check stock items against the original order, reporting any deficits to the supplies department, and arranging for the delivery to take place as and when required.
- Do the yearly Stock takes
- Inform the ward/manager of any changes in ordering, packaging or delivery of the supplies.
- Keep all storage areas stocked appropriately e.g. bed areas, clean room

Catering:

- Serving and clear away meals
- Prepare snacks and drinks

Clerical

- Answer the telephone and relay messages to the appropriate person in a timely manner
- Undertake general clerical duties, filing, photocopying & word processing
- Record all written information accurately, legibly and in a timely manner

- Provide a messenger service between departments as and when required
- Order patient transport
- Greet visitors to the unit in a friendly, helpful manner

Ward Clerk-Scope of Role

The NHS Health Careers web site describes what an individual may do as a Ward Clerk in the following way:

Depending on where you work as a clerk, you could be:

- booking patients in for appointments
- filing
- chasing up reports
- photocopying
- inputting data
- ordering stationery
- answering the phone
- helping to cover a reception area
- word processing
- booking patient transport

Some clerks may spend their time on a particular type of work. The job title often reflects this, for example:

- clerk/typist
- reception clerk/receptionist
- clinical coding clerk
- admissions clerk
- **ward clerk**
- clinic clerk

Clerks working on a ward or in a clinic or health centre have a lot of contact with patients. As a clerk working on a ward or in a clinic or health centre, you'll have a lot of contact with patients and their relatives and carers. You may also have contact with healthcare professionals including nurses and doctors. You'll work closely with other administrative staff and other members of the wider healthcare team.

(Taken from <https://www.healthcareers.nhs.uk/explore-roles/administration/clerk> on 09/02/17)

The description below of the main duties of a Ward Clerk has been compiled from job descriptions and information that was sent in by respondents to the questionnaire. Not all job descriptions that were provided had the job title of Ward Clerk. Job titles included Support Medical Secretary, Group Administrator, Appointments Officer, Generic Secretarial and Clerical Posts. The duties listed below might not therefore all be carried out by every 'Ward Clerk'.

General Administrative:

- Filing; chasing up reports; photocopying
- Data entry and retrieval
- Ensure that stationery/supplies are ordered as necessary
- Receive messages in person, by telephone, e-mail or letter and respond appropriately
- Provide secretarial support

Reception Service:

- Greet patients and visitors, including those with communication difficulties, on arrival to the ward
- Show patients to designated waiting areas and give information packs and/or leaflets where applicable
- Ensure the nurse/midwife in charge is informed of a patient's arrival in a timely manner

Patient Administration:

- Monitor and action items from the Appointments inbox
- Process referrals
- Allocate referrals where necessary to the appropriate clinics
- Booking patients in for appointments
- Dealing with "Did not Attend" clinic notes and reallocating appointments as appropriate
- Collate and maintain waiting lists, having regard to degree of urgency
- Maintain patient admission documentation and ensure record of clinical activity is kept
- Prepare patients' notes and other documentation as necessary
- Make patients' notes available prior to admission/day case appointments
- Arrange follow-up appointments
- Arrange tests and investigations requested by others, collating results and drawing these to the attention of the Consultant as appropriate.
- Return discharged patient notes promptly to appropriate secretaries or medical records department, including case note tracking
- Reviewing case-notes on discharge to arrange further follow up as appropriate
- Correctly cancel and rebook outpatient clinics as necessary
- Book transport for patients
- Book and record the use of bank staff as directed by the nurse/midwife in charge

Liaison with others:

- Liaise between the ward and other departments, including Pharmacy, Pathology and Stores.
- Liaise internally and externally with departments to arrange investigations and receive results and other information in a timely manner.
- Relay information appropriately to multi-professional and/or multiagency teams to ensure safe discharge and follow-up of patients
- Liaise with and deal with enquiries from patients/relatives, general practitioners Consultant medical staff, other hospital and community staff and other agencies as necessary