



Evaluation of the guiding principles and supporting resources for delegated healthcare activities

Summary report

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1. Overview

In May 2023, Skills for Care published the co-developed [guiding principles for delegated healthcare activities](#) and a suite of [supporting resources](#).

A delegated healthcare activity is an activity that a regulated healthcare professional, such as a nurse, nursing associate, occupational therapist or speech and language therapist (amongst others), delegates to a paid care worker or personal assistant (PA). Delegated healthcare activities are not new to social care and are usually, although not exclusively, of a clinical nature.

The principles support person-centred, safe, clinically appropriate and effective delegated healthcare activity, aligning to legislation, regulation and professional codes of conduct. They are designed to be adapted locally to complement existing best practice and local protocols.

This is a summary report from an independent evaluation of the principles from June 2023 – January 2024 into the use and potential impact of the guiding principles and supporting resources. The findings from the evaluation have informed a revised version of the guiding principles, published on the Skills for Care website in November 2024.

2. About the evaluation

In June 2023, Skills for Care commissioned York Consulting to undertake an independent evaluation of the [guiding principles for delegated healthcare activities](#) and [supporting resources](#).

Since publication in May 2023, the principles and supporting resources website pages have been accessed over 17,000 times. Feedback on what works well and what needed to improve was gathered via an online survey and qualitative consultations which together generated responses from 117 individuals across a range of audiences, settings and organisation size and geography.

Survey respondents by role

	No. respondents
Registered manager or deputy manager	41
Senior manager or director	29
Training and development role	12
Registered nurse	11

Social worker	5
Allied health professional	6
Care worker	2
Individual employer	2
Commissioner	1
Family member of someone drawing on care and support	1
Other	7
Total	117

Source: York Consulting. 'Other' includes a Health and Social Care Integration Programme Lead, an Integrated Care Board Programme Lead, a Local Authority Contracts Quality Manager and a former clinician.

A regular dialogue was also maintained with nine test sites that agreed to trial the guiding principles and/or supporting resources within their organisations or networks and feedback was gathered at a face-to-face learning event in February 2024.

Whilst the respondents' feedback was often consistent or similar, it cannot be assumed that it would necessarily be echoed by others that have used the principles and resources but who did not take part in the evaluation. However, the report findings provided a useful foundation for updates to the guiding principles, published in November 2024.

3. Key findings

Feedback on the guiding principles

Most respondents found the guiding principles to be useful, clear and comprehensive. They are being used to help providers and social care workers deepen their knowledge of delegation, make better decisions about delegation and establish new conversations and relationships with people drawing on care and support and with healthcare professionals.

At least seven in ten respondents agreed with the following statements:

The guiding principles have...

- Improved my knowledge of, and confidence in, undertaking delegated healthcare activities (75%)
- Enabled better decision-making and consent (71%)
- Enabled better conversations and relationships across health and social care (78%)
- Made delegation more person-centred, enabling more choice and control for people drawing on care and support (71%)

- Reduced the risks associated with delegated healthcare activities (70%)
- Enabled a better care experience and outcomes for people drawing on care and support (73%)
- Increased my understanding of safe and effective delegated healthcare activities (79%)

Some social care providers have updated their internal policies and procedures in accordance with the principles and/or have incorporated them within joint assessments of care needs. Improved quality and consistency of care was mentioned. Others spoke of hospital discharge delays either reducing or being avoided following the adoption of the principles.

Whilst the guiding principles are there to support person-centred, safe and effective delegation of healthcare activities, the evaluation highlighted the complexity of decision-making across the integrated health and social care system and that situations and challenges will arise that are outside of the scope of the principles.

Feedback on the supporting resources

Three-quarters of the fifty-five respondents who provided feedback on one or more of the supporting resources agreed that they had improved their knowledge and/or confidence of delegated healthcare activities, had reduced risk and were making delegation more person-centred. A similar proportion said the resources were helping them to provide a better care experience for people drawing on care and support.

At least seven in ten respondents agreed with the following statements:

The supporting resources have...

- Improved my knowledge/confidence of undertaking delegated healthcare activities (74%)
- Enabled better decision-making and consent (73%)
- Enabled better conversations and relationships across health and social care (76%)
- Made delegation more person-centred (75%)
- Reduced the risks associated with delegated healthcare activities (72%)
- Enabled a better care experience and outcomes for people drawing on care and support (72%)

4. Recommendations

Recommendations included:

- **Update the guiding principles** to include more detail on the responsibilities and expectations around training, competency assessment and ongoing supervision.
- Continue to promote the guiding principles and supporting resources across **both health and social care audiences**. They have the potential to be widely used and well-trusted documents.
- The evaluation evidence suggests that ongoing dialogue with health colleagues will help to build trust and confidence to delegate **across organisational and professional boundaries**.
- Further discussion and engagement is required about the training, competency and support required for **individual employers and personal assistants** from the delegating healthcare professionals.
- Place-based system conversations should be considered to prompt discussion and agreement of **sufficient resourcing** to support person-centred, safe and effective delegation.

The findings and recommendations are being used to inform the direction of Skills for Care's Department of Health and Social Care (DHSC) programme of work for 2024/25. It is also guiding content and themes for the bi-monthly 'National learning exchange for delegated healthcare activities' sessions, as well as in discussions at the insight steering group for delegated healthcare to consider challenges, solutions and levers from a strategic perspective.

In response to the recommendations, the guiding principles and supporting resources have been updated in November 2024 and the appendices below provide an overview of the updates.

Overall, there have been minimal updates to the guiding principles. Changes made mainly relate to strengthening the themes of resourcing, learning and development, supervision and clinical oversight of healthcare activities and the importance of integrated system approaches.

5. Acknowledgements

Skills for Care and York Consulting would like to thank the 117 individuals who completed the online survey, gave feedback at the national event or took part in qualitative consultation.

We would also like to thank the nine test sites who trialled the resources:

- Achieve Together
- Flexicare UK
- Hertfordshire Care Providers Association
- Home Instead
- Kent and Medway Integrated Care Board
- NHS South Yorkshire Integrated Care Board
- Suffolk County Council
- The Good Care Group
- Turning Point

Appendix A

Updates to the guiding principles as a result of the evaluation findings:

There has been a change to the language throughout the principles from people accessing care and support to people drawing on care and support and to clarify where a delegating healthcare professional is being referred to.

The evaluation highlighted that the inclusion of a list of delegated healthcare activities in the section 'What delegated healthcare activity can be delegated?' would be helpful. However, through discussion with regulators and DHSC, it was determined that this was not appropriate due to the potential level of risk and significant harm this could cause. The text has therefore been updated to reflect that this is not supported or advocated.

The requirement for a collaborative and inclusive approach, with health and care system conversations being essential to decide appropriate resourcing and training has been strengthened. There's a recognition that local conversations and agreement will differ depending on the activity, proportionality and complexity.

The principles now state that learning and development needs should be agreed when planning delegated healthcare activities along with consideration of the associated funding, resourcing and agreement to support and sustain the delegation. It is the responsibility of the regulated healthcare professional and the social care provider to

ensure that the care workers are competent to carry out the healthcare activity delegated to them. They should also be able to demonstrate that learning and development and support has been provided for them to deliver the activity to the required standard.

A link to the CQC's [The scope of registration May 2022](#) has been included to clarify the registration requirements for delegated healthcare activity.

A link to [guidance published by NHS England](#) has been included which may be useful to consider for joint commissioning arrangement discussions.

The term 'supervision' has been clarified. The principles now refer to supervision by a healthcare professional, either directly or indirectly, for example observing how an activity is being carried out, providing an opportunity to ask questions and to assess competency on how to carry out the activity safely. The arrangements for how and by whom the supervision of the activity will be carried out, should be agreed with the delegating regulated healthcare professional, the social care provider, the manager and the care worker. This should be reviewed regularly throughout the cycle of delegated activity.

Appendix B

Updates to the supporting resources as a result of the evaluation findings¹

The [National Care Forum decision tree](#)

- **Section 4** – the recommendation has been changed to:
Care providers must ensure they have the right governance, support and regulation to support where delegation occurs within their own organisation, as well as across external organisations and the system.
- **Section 7** – the recommendation has been changed to:
Ensure there is sufficient evidence of how the learning and development, skills and competency required has been agreed and assessed between the care provider and the delegating regulated healthcare professional, including how and when these will be refreshed.

¹ No updates were suggested to the Lincolnshire Care Association Governance toolkits and no feedback was received on the ADASS top tips for commissioners.

The [National Care Forum sample policies](#):

- The language has been updated through the policies to reflect people drawing on care and support.
- There has been an update included across the policies in relation to social and clinical judgement and ensuring appropriate arrangements are in place for a care worker to raise concerns or changes and know who to contact for support and guidance.
- Consideration and agreement between health and care systems should be given to how additional and/or refresher training is funded and delivered to enable sustainable delegation.