

Lead Nurse Toolkit



AVON LOCAL
MEDICAL COMMITTEE

SOMERSET
LMC

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Introduction

This document has been jointly developed by Avon & Somerset LMCs to support lead nurses in general practice in meeting compliance requirements. Every primary care practice or organisation is different, and each will operate differently. It is important to note that the information included within this toolkit is designed to complement or support existing policies and procedures rather than replace them. Practices will remain responsible for determining working methods; therefore, discussing any proposed changes with your management team is essential before implementing.

CQC

The Care Quality Commission (CQC) is England's independent regulator of health and adult social care. Its primary role is to ensure that health and social care services deliver safe, effective, compassionate, and high-quality care while encouraging these services to continually improve. CQC's activities include monitoring, inspecting, and regulating services, and its findings are made public.

CQC provides a range of [MythBusters](#), which you might find useful when seeking information on a specific subject.

One Care also has a CQC readiness, which you may find useful in conjunction with this document; you can access it [here](#).

As a lead nurse, you will have responsibility for meeting CQC requirements relevant to your role, and as part of practice inspection, in collaboration with colleagues, you may be required to provide the following evidence (please note this list is not exhaustive):

- ❖ Audit log/record
- ❖ Fridge temperature log ([dating back 5 years](#))
- ❖ PGD/PSD records
- ❖ Health and Safety Risk Assessment (including any action log)
- ❖ Infection, Prevention and Control audit and action log
- ❖ List of staff, including specific roles, i.e., safeguarding lead, cervical screening, immunisations, etc.
- ❖ Minutes of meetings (to include MDT meetings, meetings during which IPC, premises, cleaning of premises, and significant events have been discussed)
- ❖ Record/log of emergency medicines and equipment checks
- ❖ Record of quality improvement activity within the last 48 months
- ❖ Record of staff feedback and action(s) taken (within the last 12 months)
- ❖ Safeguarding risk register (names redacted)
- ❖ Staff HR matrix (to evidence CV, interview notes, contract of employment, photo ID, references, DBS, qualifications, registration, performers list, immunisation status, induction)
- ❖ Staff immunisation matrix (supported by evidence of immunisation statuses)
- ❖ Staff training matrix (incorporating all mandatory and necessary training)

- ❖ Summary of complaints (12 months), compliments (6 months) & significant events (12 months) and actions taken

Policies, Protocols & Processes

There is no definitive list of policies or protocols you should have; it is important to ensure that practices are safe, effective, and evidence-based, and you should risk assess when a policy or protocol is required

On inspection, CQC may request to see a range of policies. Here are some examples of what they may ask to review (please note that this list is not exhaustive).

- Chaperone policy
- Clinical supervision
- Cold chain policy
- HCA protocols and/or HCA Handbook
- Home visits policy
- Induction policy
- Infection, Prevention and Control policy
- Medical Emergencies policy (incorporating details of emergency medicines and equipment held, frequency of checks, etc.)
- Medicines and medical gases storage protocol
- Prescribing policy (incorporating medicines management, high-risk medicines, prescription form security)
- Safeguarding policy
- Clinical policies /processes / SOPs

When implementing a policy, you should identify its need, determine its content, obtain stakeholder support, communicate with employees, and update and revise it as needed.

Every practice in BNSSG has access to Practice Index provided by OneCare, and the [Policy Manager](#) gives you access to over 900 policies and procedures. The policy manager updates these regularly, and you will be automatically notified. This helps ensure that your policy library and staff members are updated; however, it is important to ensure that these are relevant to your practice area and personalised where required.

Features and benefits of Practice Index Policy Manager:

- ❖ Create a library of policies that your staff can view at any time
- ❖ Assign policy owners
- ❖ Categorise your policies
- ❖ Schedule reminders and review dates for policies
- ❖ Track and report on whether staff have read policies
- ❖ Access ready-made quiz questions on key policies
- ❖ Add your own policies and documents
- ❖ Keep all policies in one safe, secure, and accessible place

Clinical Guidance

NICE Guidance: Evidence-based recommendations for the health and social care sector, developed by independent committees, including professionals and lay members, and consulted on by stakeholders. You can sign up for updates [here](#).

BNSSG Remedy: the GP Referral Support Tool provides quick and easy access to clinical pathways and guidelines for GPs across BNSSG. Remedy has been developed in collaboration with local clinicians and specialists to help GPs provide their patients with the care they need in the right place with minimal delays. On this site, you will find a range of useful resources, including local care pathways, clinical guidance, referral forms, service information, and links to community resources.

Audit and Regular Checks

As a lead nurse, you will be responsible for undertaking a range of regular checks and audits; below is a table summarising a range of checks/audits that you may be required to undertake.

Key: X: Recommended !: Best Practice Guidance *: Suggested

	Twice Daily	Daily	Weekly	Monthly	2 monthly	Quarterly	6 monthly	Annually
Fridge temperature	x	!						
Room cleaning		x						
Dressing Stock check				*				
Emergency Equipment & Defib			!					
Oxygen		x						
BM Machine			x					
GP bag				x				
Drug cupboard Check				x				
Fridge stock check (exp/stock levels)			Ensure capacity for clinics	x				
IPC audit (National Cleanliness Standards)			FR1	FR2	FR3	FR4	FR5	FR6
Curtains							x	
Hand Hygiene								x

Please note that this list is not exhaustive, and your practice processes may reflect different timescales and/or requirements. All practices within BNSSG have access to TeamNet, which can be used to log and record this information and create diary reminders. If you need any help with this, please contact enquiries@onecare.org.uk.

Clinical Audit

A clinical audit is a way to determine if healthcare is being provided in line with standards and helps care providers and patients identify where their service is doing well and where improvements could be made.

CQC will look at participation in relevant local audits and other monitoring activities, such as reviews of services, benchmarking, peer review and service accreditation, you can find further information [here](#).

Staff performing cervical screening are responsible for maintaining their records, fail safes, and audits. You can find further information [here](#).

Additional information



Nurse%20Audit.docx

Resuscitation & Medical Emergencies

All GP practices must be equipped to deal with a medical emergency, including resuscitation.

CQC states “Practices should have:

- ❖ immediate access to appropriate resuscitation equipment and drugs when needed
- ❖ a way for all staff to call for help
- ❖ staff who are trained to use equipment according to their roles
- ❖ local risk assessment is overseen by a designated resuscitation lead
- ❖ personal protective equipment (PPE) and sharps boxes
- ❖ a reliable system to check and replace equipment that follows the manufacturer's instructions.”

The Resuscitation Council UK has [quality standards](#) for cardiopulmonary resuscitation (CPR) practice and training, including a suggested list of emergency medicines; you can also find information on the [CQC myth-buster](#).

Medicines Management

The BNSSG ICB has a dedicated Medicines Optimisation team that is responsible for the clinical and cost-effective use of medicines.

The [website](#) includes a range of policies and procedures for medicines and prescribing resources for medicines and prescribing.

[BNSSG Joint Formulary](#)

The Medicines Optimisation team can be contacted by emailing bnssg.medicines-optimisation@nhs.net. You can also email them if you wish to sign up to receive updates.

Please find attached the Avon LMC Medicines Management slide set, which covers further key information relating to medicine management for nurses.



Medicines%20Management.pptx

Nurse Management & Leadership

There is a distinct difference between management and leadership, and as a Lead Nurse, you are likely to fulfil both roles. Having the necessary knowledge and skills to fulfil these roles is imperative in supporting a well-led, successful team.

There is a [Management & Leadership toolkit](#) available on eLearning for health that you might find useful to undertake when taking on a new management and/or leadership role covering the following subjects:

- ❖ Appraisal Skills
- ❖ Assertiveness in the Workplace
- ❖ Behavioural Based Interviewing
- ❖ Coaching Skills
- ❖ Coaching to Support Change
- ❖ Dealing with Difficult People
- ❖ Delivering and Receiving Effective Feedback
- ❖ Empowering the Manager – Managing Upwards
- ❖ Innovation in the Workplace
- ❖ Large Scale Change – Managing Personal Transition
- ❖ Leading, Managing and Dealing with Change
- ❖ Managing Absence
- ❖ Managing Stress in the Workplace
- ❖ Performance Management
- ❖ Service Improvement
- ❖ The Situational Leader

The [NHS Leadership Academy](#) has developed a model, tools and resources designed to develop and support non-clinical and clinical leaders and aspiring leaders.

Nurse manager functions (please note this list is not exhaustive):

Function	Description	Resources
Appraisals	“Staff should receive regular appraisal of their performance in their role from an appropriately skilled and experienced person, and any training, learning and development needs should be identified, planned for and supported” (CQC, 2024)	Practice Index appraisal training 360 appraisal feedback People Performance Management Toolkit CQC Regulation 18: Staffing
Clinical Supervision	“Staff must receive appropriate supervision in their role to ensure they demonstrate and maintain competence in understanding the needs of people with a learning disability and autistic people, including knowing how to support them in the best way.” (CQC, 2024)	CQC Regulation 18: Staffing Supervision for Multi-Professional Teams programme RCN position on clinical supervision
Conduct and capability	There may be times when you are required to address the performance of your team members. This process should be managed fairly and correctly.	ACAS Conduct and capability procedures when managing performance People Performance Management Toolkit
Induction	Advice for employers on settling in a new employee once they have accepted a job offer. Providers must ensure that they have an induction programme that prepares staff for their role (CQC, 2024)	ACAS Guide to Induction CQC Regulation 18: Staffing NHSE Induction Resources for HCAs
Probation	Probationary periods are typically six months long and are used to assess a new employee's performance, conduct, and attendance. During this time, a manager monitors the employee's performance against the role's requirements and the organisation's values and behaviours.	NHS Employers People Performance Management Toolkit
Recruitment	It is essential to undertake all relevant HR processes and retain evidence. This may include a CV/application form, interview notes, contract of employment, relevant identity checks, references, DBS, qualifications, registration & immunisation status	ACAS Recruitment & Job applications CQC Regulation 19: Fit and proper persons employed
Sickness, Absence and Leave	Having clear absence policies can help you manage absences in your organisation. Policies will clarify what's expected of you and your employees if they need time off work.	NHS Employers Sickness Absence Toolkit ACAS Holiday, sickness and leave

		Practice Index Top tips for managing absence
Team Meetings	Your team meetings are to give direction to the work, to ensure everybody know what they are doing (and why), to translate strategy into actions and to agree who will do those actions and when. Team meetings keep the team informed about important initiatives and topics and you informed about the concerns of the team.	NHS Employers TEAM toolkit Supporting the wellbeing needs of NHS staff
Templates	Examples include letters, forms, policies, and HR documents for employers and HR managers to download and adapt for their organisations.	ACAS Templates for Employers

Staff Immunisation

[CQC](#) states, “GP practices must ensure that staff receive the appropriate immunisations for their role. You should be able to show that the practice has an effective employee immunisation programme. This includes demonstrating how you arrange this service. As well as this:

- ❖ all employees should be able to have an occupational health assessment
- ❖ new employees should have a pre-employment health assessment.
- ❖ These assessments should include a review of their immunisation needs.”

The 'Green Book' [Immunisation of Healthcare and Laboratory staff: The Green Book, chapter 12](#), gives information on immunisation for staff in general practice. This includes which immunisations may be appropriate for different staff groups, depending on their role and where they work.

There may be occasions where you vaccinate staff in house e.g. seasonal influenza, covid, it is important to ensure that you use the correct legal framework such as [written instructions](#).

Skills, knowledge and Training

Employers and employees are responsible for ensuring staff are appropriately trained with the knowledge, skills and capabilities required to undertake their roles.

CQC states, "Training, learning and development needs of individual staff members must be carried out at the start of employment and reviewed at appropriate intervals. Staff must be supported in undertaking training, learning, and development to enable them to fulfil the requirements of their role." ([CQC, 2024](#))

The BNSSG Training Hub and Avon Local Medical Committee have developed a training matrix that you may find useful.



Training%20matrix%
20for%20clinical%20:

The Royal College of Nursing also provides further advice and guidance on staff training, which you can access [here](#).

Scope of Practice and Career and Capability Frameworks

A range of resources are available that outline the scope of practice and capabilities of various nursing team members.

[Practice Index The Healthcare Assistant Handbook](#)

[RCN position statement on the role and scope of practice of the Nursing Associate](#)

[Primary Care & General Practice Nursing Career & Core Capabilities Framework](#)

[Core Capabilities Framework for Advanced Clinical Practice \(Nurses\) Working in General Practice / Primary Care in England](#)

[Multi-professional framework for advanced clinical practice in England](#)

Infection Prevention, Control and Management (IPC&M)

All health care and adult social care providers should meet or exceed the [Health and Social Care Act 2008 code of practice on preventing and controlling infections and related guidance](#).

The [CQC GP MythBusters 99: Infection Prevention and Control in General Practice](#) provides guidance on General Practice responsibilities and also provides key links and information relating to IPC&M.

The ICB Infection Prevention and Control team contact details are bnssg.ipcmgovernanceresponsegroup@nhs.net

There is a dedicated page on NHS Futures for South-West IPC leads. This includes a General Practice IPC toolkit; you can request access [here](#).

Other useful links:

[National Standards of Healthcare Cleanliness 2021](#)

[National infection prevention and control manual \(NIPCM\) for England](#)

[Infection Prevention Control, IPC resources for General Practice](#)



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Useful Contacts & Resources

Subject	Description	Contact and/or Website
Nursing queries	For any queries relating to General Practice Nursing, the Director of Nursing at Avon LMC can offer advice, support & guidance.	Nursing@almc.co.uk
Generic contractual, pastoral, DBS queries	The Avon LMC can offer advice, support, and guidance for any queries relating to General Practice contracts, DBS, or pastoral support.	info@almc.co.uk 0117 9702755 https://avonlmc.co.uk/
New to Practice Programme	 N2PP%20Revised%20PP%20(5.24)%20(1).	Legacy.nurses@almc.co.uk
SNA, NA & RNDA programmes	For any queries regarding student Nursing Associates, Nursing Associates, or registered nurse degree apprentices.	Legacy.nurses@almc.co.uk
Training and Education	The BNSSG Training Hub are the “go-to place” for primary care workforce education, training, and development in Bristol, North	bnssg.training.hub@nhs.net

	Somerset, and South Gloucestershire (BNSSG).	
Student nurse placements	Sarah Carlyon is the dedicated BNSSG General Practice PEF (Practice education facilitator) who manages queries relating to student nurse placements.	sarah.carlyon2@nhs.net
Student Nurse Associate Placements	BNSSG has dedicated Student Nurse Associate PEFs (Practice Education Facilitators) who manage queries relating to Student Nurse associate placements	sirona.bnssgplacementfacilitators@nhs.net
Immunisations & Vaccinations Team Net Page	A dedicated page for immunisation in General Practice which includes links to guidance, information and support.	Immunisations and Vaccinations (clarity.co.uk)
Immunisation Queries (including clinical advice and guidance)	The aim of the South West Immunisation Clinical Advice Response Service (ICARS) is to provide public health guidance to clinicians administering vaccines and to respond to	england.swicars@nhs.net https://www.england.nhs.uk/south/info-professional/public-health/immunisations/immunisation-clinical-advice-response-service-icars/

	clinical incidents as they arise in these programmes.	
Infection Prevention & Control Queries	For any queries relating to Infection Prevention Control and Management	bnssg.ipcmgovernanceresponsegroup@nhs.net
Child Health Information Service (CHIS)	SCW Child Health Information Services (CHIS) is an NHS-commissioned service responsible for collating immunisation and screening data from healthcare professionals for children aged 0-19 in a specified area, into a single child health record.	https://scwcsu.nhs.uk/services/child-health-information-services-chis?source=Confed21 scwcsu.bnsssg.swchis@nhs.net 0300 561 0595
One Care	One care is the local GP federation, which can support a range of areas, including digital, business intelligence and practice management.	https://onecare.org.uk/contact/enquiries@onecare.org.uk 0117 941 0900

Keeping up to date

Avon LMC Newsletter – sign up [here](#)

One Care Bulletin – sign up [here](#)

BNSSG Training Hub Newsletter – sign up [here](#)

Avon LMC Lead Nurse Community of Practice, contact Nursing@almc.co.uk.

BNSSG General Practice Nurse forum, contact elizabeth.mallett1@nhs.net.

South West Vaccination and Screening GP weekly Bulletin, contact england.swicars@nhs.net

Frequently Asked Questions

Do we have to offer a Travel Health Service?

NHS GP practices are required to offer certain vaccinations free of charge for travel purposes. The travel vaccines available on the NHS are provided because they protect against diseases considered the greatest public health risk if brought into this country. These are:

- polio (given as a combined diphtheria/tetanus/polio jab)
- typhoid
- hepatitis A
- cholera

Not all travel vaccines are provided on the NHS. See the [BMA's Travel medication and vaccinations guidance](#) for further information.

[CQC, 2024](#)

Jane Chiodini, a Travel Health Specialist nurse, has also produced some [FAQs](#).

Where can I access Training and Continued Professional Development funding?

NHS England occasionally allocates CPD funding to Training Hubs. To enquire about current CPD offers, please contact the [BNSSG Training Hub](#).

Regular education events are also available, and these are promoted in the Avon LMC, Training Hub, and One Care newsletters.

Other organisations that may be able to support with bursaries and education grants are as follows:

[The Queen's Nursing Institute Education Grant](#)
[RCN Foundation Education Grant](#)
[RCN Scholarships and bursaries](#)

The Practice Staff training budget was awarded to MA training for the financial year 24/25 please see below for details.

[Bookings](#)

Email: info@matrainingenterprise.co.uk

Telephone: 07866 491 183