



A REVIEW OF  
**Delegation  
in Practice**



Enabling People  
to Live Well  
'Closer to Home'

**ANNEX  
1**

**Scoping of HSC Trust Delegated Healthcare  
and Nursing Tasks Under Direct Payments**





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# 1.0 Introduction

## Background

Delegation of healthcare and nursing tasks takes place across many professional groups and across third party agencies. Registered nurses are guided by professional and regulatory frameworks, such as; the Nursing & Midwifery Council *The Code; professional standards of practice and behaviour for nurses, midwives and nursing associates* (NMC, 2018)<sup>1</sup>, *Deciding to Delegate: A Decision Support Framework for Nursing and Midwifery* (NIPEC, 2019)<sup>2</sup> and the Royal College of Nursing (RCN) *Accountability and Delegation guide* (RCN, 2023)<sup>3</sup> along with all other existing local HSC Trust operational policies and governance arrangements.

Recently, some concern and issues have been raised in relation to the delegation in particular, delegation of complex tasks by registered nurses and the associated implications for the delivery of safe and effective care, consistent with professional regulation requirements. Understanding more about the extent of these tasks being carried out within organisations relating to direct payments and within the different programmes of care was considered a priority by Chief Nursing Officer (CNO).

In August 2024 NIPEC agreed to support the CNO Group and work with the HSC Trusts, to capture this information and collate these findings.

# 2.0 Aim and Objectives

## Aim

To establish the current scale of delegated healthcare and nursing tasks which are supported by direct payments across the HSC Trusts.

## Objectives

- I. To gain an understanding of the number of clients where healthcare and nursing tasks are being supported through direct payments.
- II. To identify types of tasks being delegated and the programmes of care and services involved.
- III. To capture the current governance arrangements and quality assurance mechanisms around delegation of healthcare and nursing tasks across these key areas.

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<sup>1</sup> Nursing and Midwifery Council [NMC] (2018) *The Code: professional standards of practice and behaviour for nurses, midwives and nursing associates*. London

<sup>2</sup> Northern Ireland Practice & Education Council for Nursing and Midwifery (NIPEC) (2019) *Deciding to delegate: A Decision Support Framework for Nursing and Midwifery*. Belfast

<sup>3</sup> Royal College of Nursing (RCN) (2023) *Accountability and Delegation guide*. RCN: London



IV. To inform further discussions and decision making.

## Scope

This work focused only on healthcare and nursing tasks which are associated and aligned to direct payments in each HSC Trust.

## Methodology

To achieve the aim and objectives a twenty-seven item, electronic scoping survey was developed and shared with the HSC Trusts via Micro Soft Forms platform, in August 2024. (Appendix 1) (hereafter referred to as the survey). The survey was designed with space for free text to encourage more extensive responses.

Nursing Governance Assistant Directors (or relevant nominated person) were nominated by each HSC Trust, to complete the survey and progress the work.

The identified contributors were fully engaged and provided timely completion of the survey. A focused group meeting was arranged by NIPEC with the HSC Trust Nursing Governance Leads (or relevant nominated person) via MS Teams to enable further clarification on the information and exploration of the received data from all HSC Trusts.

## 3.0 Findings

All HSC Trusts completed this exercise and provided both valuable and comprehensive information. The findings demonstrate a marked variation and differences in the information reported from across the HSC Trusts. In particular, in relation to the approximate number of reported clients, where healthcare and nursing tasks are being supported through direct payments. These have been quality assured by each of the HSC Trusts, to confirm accuracy in the reported numbers and to strengthen the validity of this information.

It is worth noting from the outset that the SHSCT no longer use direct payments for nursing tasks, however there are historical cases.

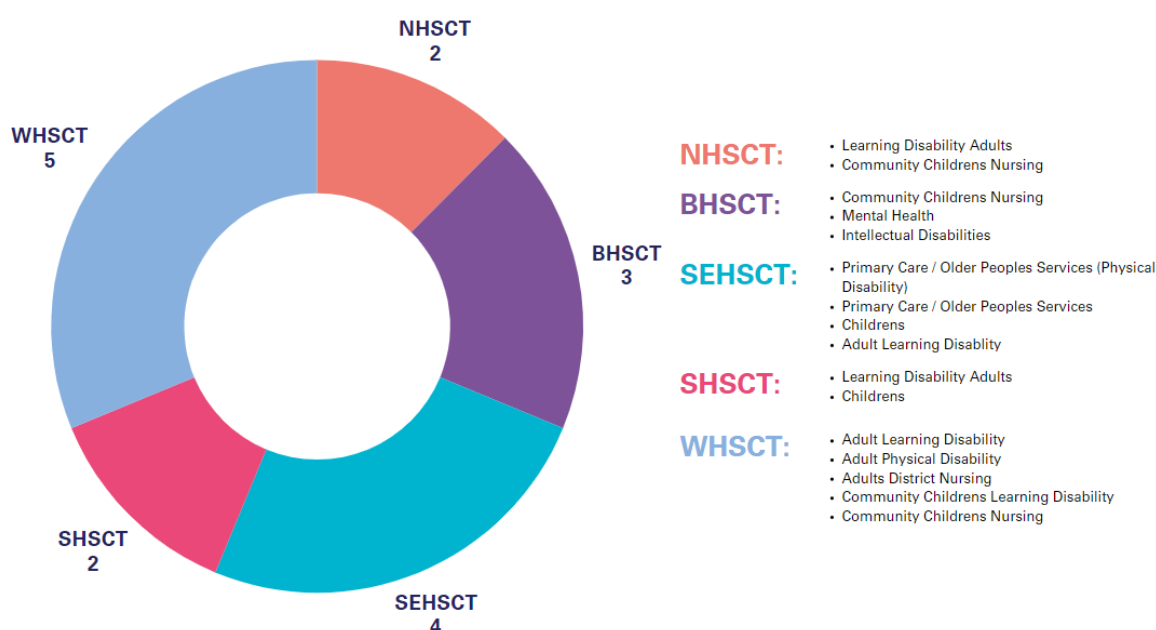
WHSCT has a Delegation Nursing Panel which is chaired by the Assistant Director of Nursing. The role and function of the panel is to review what the nurse is proposing to be delegated, to ensure it is:

- Safe for the patient;
- Protects the nurse and their registration;
- Is covered by the appropriate organisational governance requirements.

## **1. HSC Trusts and programmes of care identified where healthcare and nursing tasks are being supported through direct payments**

All of the HSC Trusts engaged in the completion of the survey. Figure 1 below identifies each of the HSC Trusts and the number of programmes of care, where healthcare and nursing tasks are being supported through direct payments within each of the HSC Trusts.

**Figure 1: HSC Trusts identified programmes of care where healthcare and nursing tasks are being supported through direct payments**



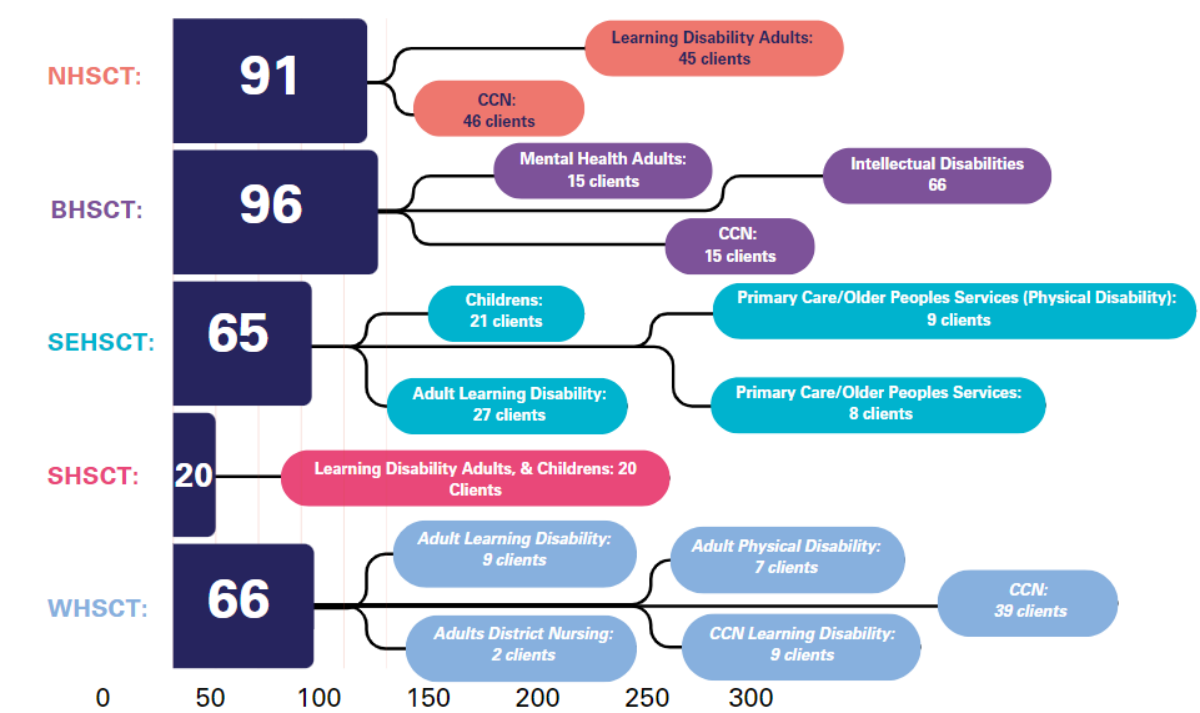
## **2. Approximate number of clients reported where healthcare and nursing tasks are being supported through direct payments**

Survey question 3, asked each HSC Trust to provide the approximate number of clients where healthcare or nursing tasks are being supported through direct payments.

### **Summary of key findings: Approximate number of clients reported where healthcare and nursing tasks are being supported through direct payments**

As figure 2 outlines, the key findings from the responses submitted suggest there is a marked variation across the HSC Trusts in the reported number of clients where healthcare and nursing tasks are being supported through direct payments; ranging from Number=20 to Number=96. It also identifies a difference within the reported programmes of care and across service areas.

**Figure 2: Approximate number of clients reported where healthcare and nursing tasks are being supported through direct payments**



### **3. Programmes of care and services across HSC Trusts**

Survey question 4, asked for a high-level breakdown of programmes of care and services where healthcare or nursing tasks are being supported through direct payments from each of the HSC Trusts.

#### **Summary of key findings: Programmes of care and services across HSC Trusts**

As presented in figure 1, each HSC Trust programmes of care and community services where healthcare and nursing tasks are delegated, supported by direct payments. These included; Childrens Community Nursing Learning Disability, Learning Disability Adults, Physical Disability Services, Childrens Community Nursing (CCN) and Paediatric Epilepsy Nursing (community) and Mental Health Services. The only Programme of Care, common to all Trusts, where healthcare and nursing tasks are delegated, supported by direct payments are Children's and Learning Disability.

HSC Trusts reported in the comments sections that CCN and Paediatric Epilepsy Nursing (community) and Physical Disability Services also delegate healthcare and nursing tasks, supported by direct payments.

#### **4. Types of healthcare and nursing tasks carried out by personal assistants employed through direct payments per HSC Trust**

Survey question 6, asked each HSC Trust to provide information regarding the type of healthcare or nursing tasks that are being carried out by the personal assistants employed through direct payments.

#### **Summary of key findings: Types of healthcare and nursing tasks carried out by personal assistants employed through direct payments per HSC Trust**

Table 2a, presents the broad range and types of healthcare and nursing tasks carried out by personal assistants employed through direct payments per HSC Trust, identified from the list provided in the survey. Table 2b, provides some additional examples.

**Table 2a: Types of healthcare and nursing tasks carried out by personal assistants employed through direct payments per HSC Trusts**

|         | Medication Administration           | Feeding                             | Complex Manual Handling             | Tracheostomy Care                   | Enteral Tube Feeding                | Management of challenging behaviour | Wound Dressing/ Compression Hosiery | Bowel Management / Enemas Etc       | Urinary Catheter Care               | Diabetes Management                 | Palliative and End of Life Care | Vital Signs Monitoring              | Emergency Medication or interventions for epilepsy | Other                               | Total: |
|---------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------------|-------------------------------------|----------------------------------------------------|-------------------------------------|--------|
| NHSCT:  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>            | <input checked="" type="checkbox"/>                | <input checked="" type="checkbox"/> | 11     |
| BHSCT:  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>        | <input type="checkbox"/>            | <input checked="" type="checkbox"/>                | <input checked="" type="checkbox"/> | 10     |
| SEHSCT: | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>                | <input checked="" type="checkbox"/> | 11     |
| SHSCT:  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>        | <input type="checkbox"/>            | <input type="checkbox"/>                           | <input checked="" type="checkbox"/> | 4      |
| WHSCT:  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>        | <input type="checkbox"/>            | <input type="checkbox"/>                           | <input checked="" type="checkbox"/> | 9      |

**Table 2b: Additional reported healthcare and nursing tasks carried out by personal assistants employed through direct payments per HSC Trust**

|                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>NHSCT, additional tasks</b></p> <ol style="list-style-type: none"> <li>1. Oxygen</li> <li>2. SaO2 monitoring</li> <li>3. BiPAP/ CPAP</li> <li>4. Oral hygiene</li> <li>5. Nebulisers</li> </ol>                                                           | <p><b>BHSCT, additional tasks</b></p> <ol style="list-style-type: none"> <li>1. Social care tasks</li> <li>2. Personal care</li> <li>3. Oxygen</li> <li>4. Suction</li> <li>5. BiPAP/CPAP</li> </ol> |
| <p><b>SEHSCT, reported additional tasks:</b></p> <ol style="list-style-type: none"> <li>1. Use of cough assist humidifier</li> <li>2. Use of nebulisers</li> <li>3. Oral suction</li> <li>4. Use of ventilator/BiPAP</li> <li>5. Use of SATS machine</li> </ol> | <p><b>WHST, reported additional tasks:</b></p> <ol style="list-style-type: none"> <li>1. SaO2 monitoring</li> <li>2. Oxygen</li> <li>3. Nebulisers</li> </ol>                                        |

**Summary of key findings: Additional reported healthcare and nursing tasks carried out by personal assistants employed through direct payments per HSC Trust**

Key findings from the responses submitted suggest tracheostomy care, medication administration, enteral tube feeding and vital signs monitoring were common to all Trusts. Information submitted would suggest that the NHSCT and SEHSCT jointly delegate a significant number of tasks. Closely followed by BHSCT and WHSCT, then SHSCT who delegate the least number.

Other additional healthcare or nursing tasks reported across four Trusts, commonly include; administration of oxygen, SaO2 monitoring, nebulisers, suction and BiPAP/CPAP. SHSCT did not report any additional tasks.

## 5. Nursing assessment and risk assessment prior to delegation of the task

Survey question 8, asked whether the nurse undertakes a nursing assessment and risk assessment prior to the delegation of the tasks carried out by personal assistants employed through direct payments. The responses submitted are presented, aligned to each HSC Trust below;

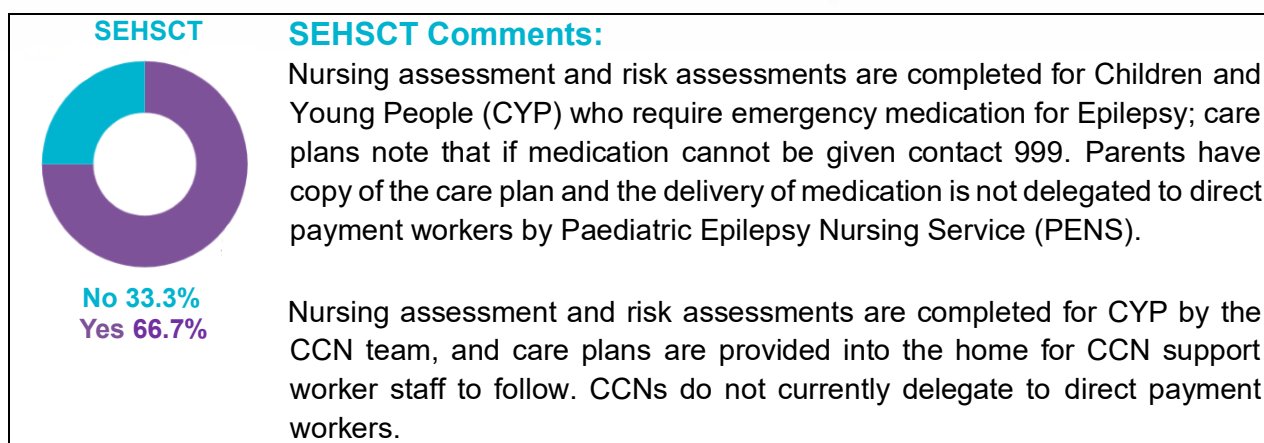
**Table 3a: Nursing assessment and risk assessment prior to delegation**

|                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>NHSCT</b></p>  <p><b>Yes 100%</b></p> | <p><b>NHSCT Comments:</b></p> <p>Yes, nursing and risk assessments are completed for all instances of delegated care to children using:</p> <ul style="list-style-type: none"><li>○ The NIPEC Delegation Framework (2019);</li><li>○ Northern Ireland Paediatric Nursing Assessment;</li><li>○ Trust policies and procedures.</li></ul> <p>Very often in relation to that risk assessment, input, discussion and clarity is required from Consultant Pediatricians and other specialist nurses in the Royal Belfast Hospital for Sick Children. Many of the children with complex physical healthcare needs are managed and clinically reviewed by tertiary services in BHSCT. This additional element of holistic risk assessment would be part of the decision-making process in respect of a child with significant clinical risk for whom delegation of nursing care may not appropriate.</p> <p>In addition, of note from Childrens Services NHSCT; all oxygen administration is prescribed by a Consultant Paediatrician and any monitoring of O2 saturations is within parameters that are predetermined by a Consultant Paediatrician and that forms part of the child protocol of care.</p> |
|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

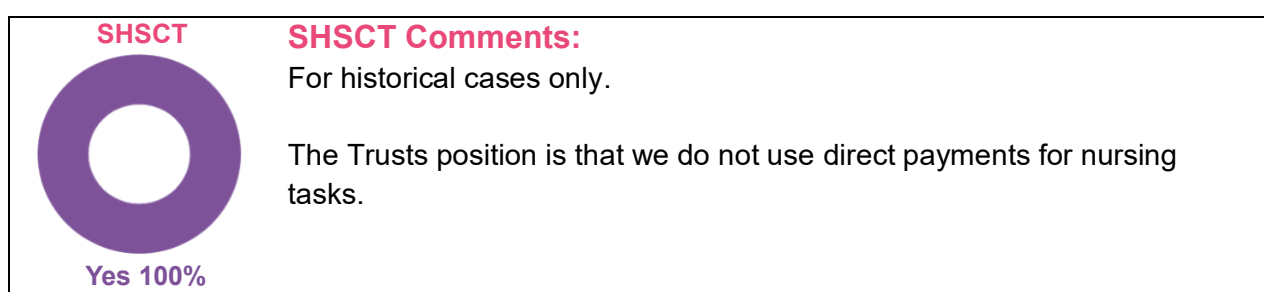
**Table 3b: Nursing assessment and risk assessment prior to delegation**

|                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>BHSCT</b></p>  <p><b>Yes 50%</b><br/><b>No 50%</b></p> | <p><b>BHSCT Comments:</b></p> <p>CCN assessments, Northern Ireland Paediatric Nursing Assessment (NIPNA) and risk assessment are completed by the CCN team who work closely with Children with Disability Social Work Service and other Multi-Disciplinary Team (MDT) colleagues, primarily Physiotherapists and Consultant Paediatricians.</p> |
|-------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

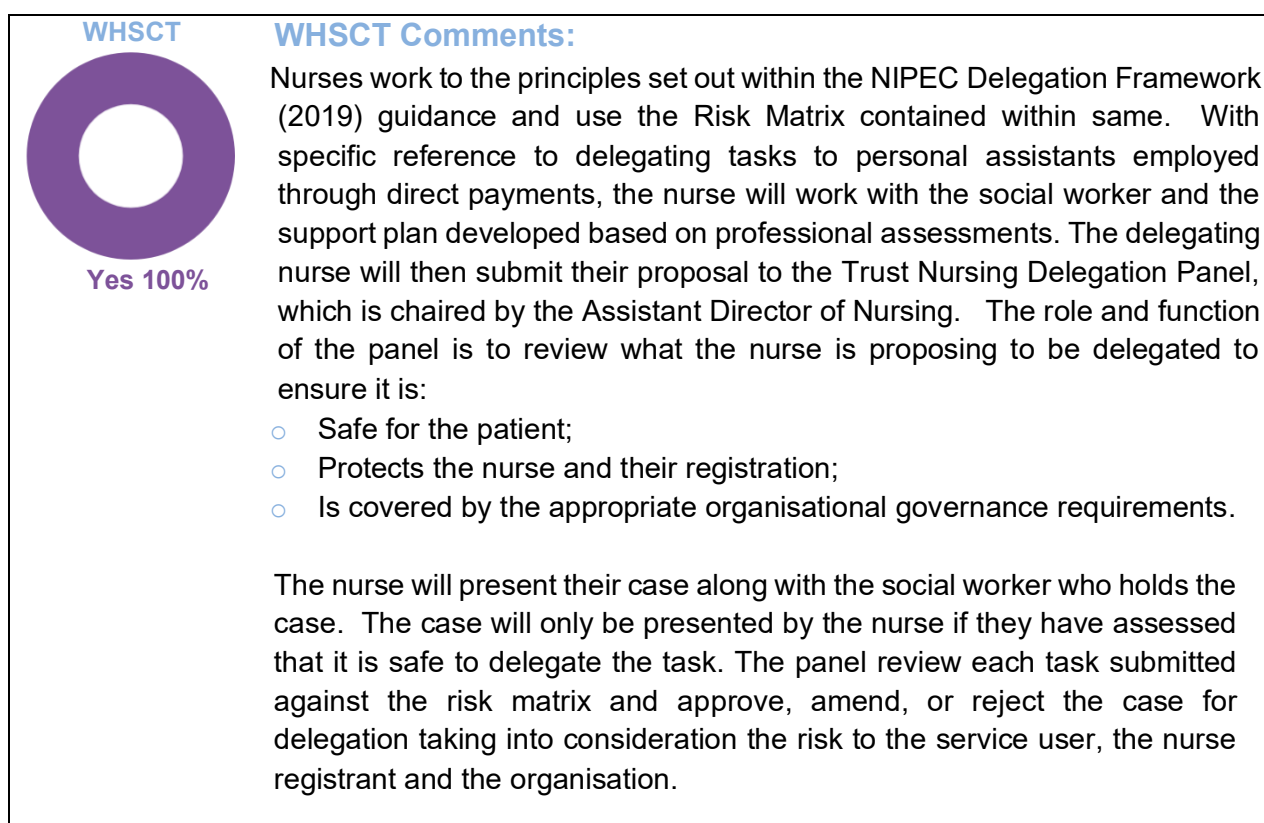
**Table 3c: Nursing assessment and risk assessment prior to delegation**



**Table 3d: Nursing assessment and risk assessment prior to delegation**



**Table 3e: Nursing assessment and risk assessment prior to delegation**



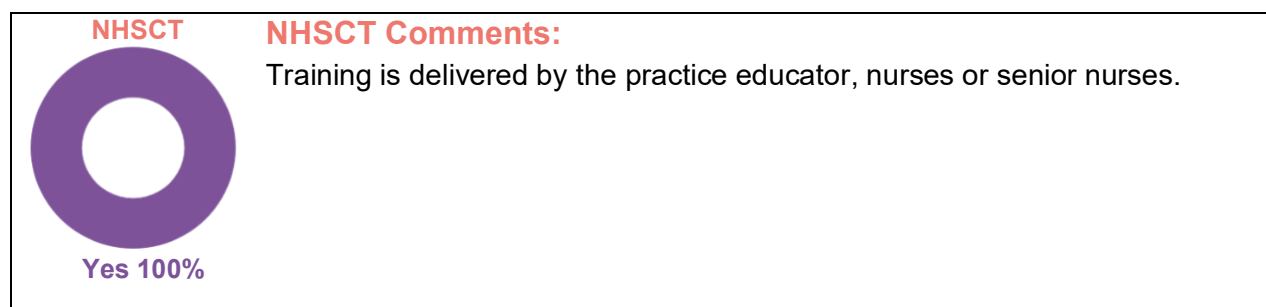
## Summary of key findings: Nursing assessment and risk assessment prior to delegation of the Task

Key findings from the responses submitted suggest a variation in local practices. Three Trusts reported that nurses undertake a nursing assessment and risk assessment, prior to the delegation of the tasks carried out by personal assistants employed through direct payments. Three Trusts reported assessments are undertaken by nurses. One Trust reported a mixed proportion; whilst recognising nurses undertake this for Childrens`, reported mostly not undertaken by nurses.

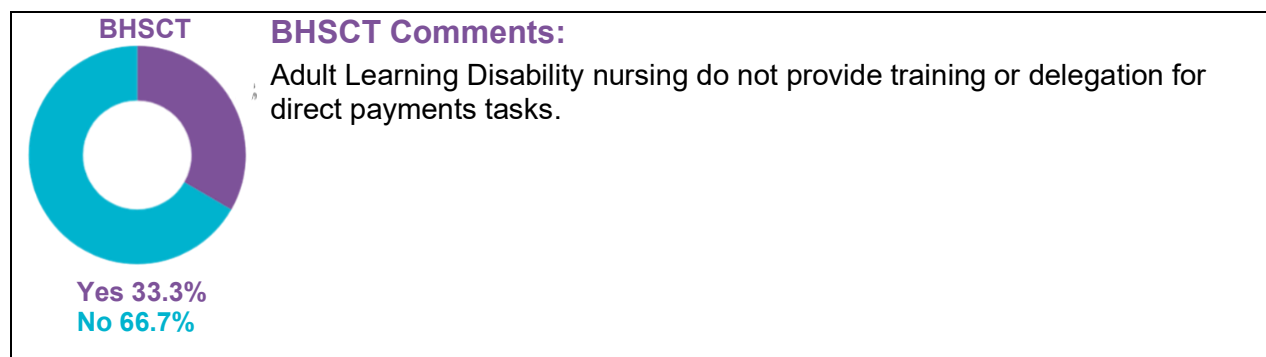
### 4. Nurse delivered training for personal assistants associated with the tasks or care delegated

Survey question 10, asked whether the nurse delivered the training for personal assistants associated with the tasks or care delegated. Table 4a, 4b, 4c, 4d and 4e presents the findings aligned to each HSC Trust. The responses submitted are presented, aligned to each HSC Trust below;

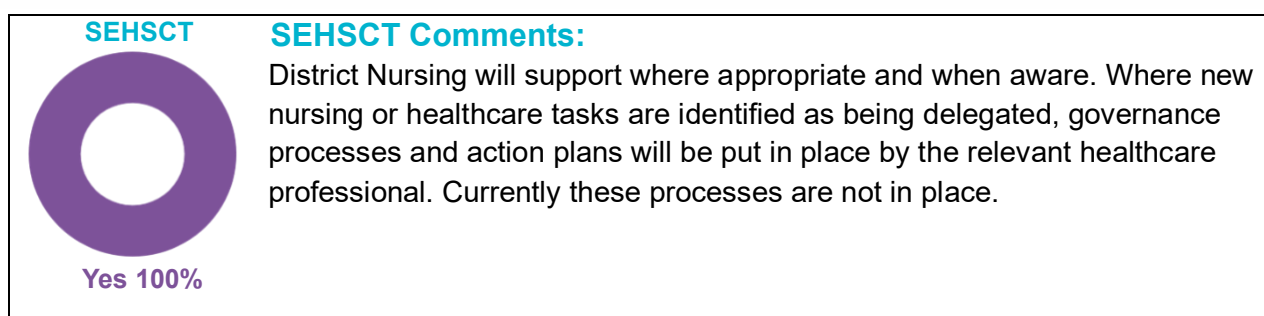
**Table 4a: Nurse delivered the training for personal assistants associated with the tasks or care delegated**



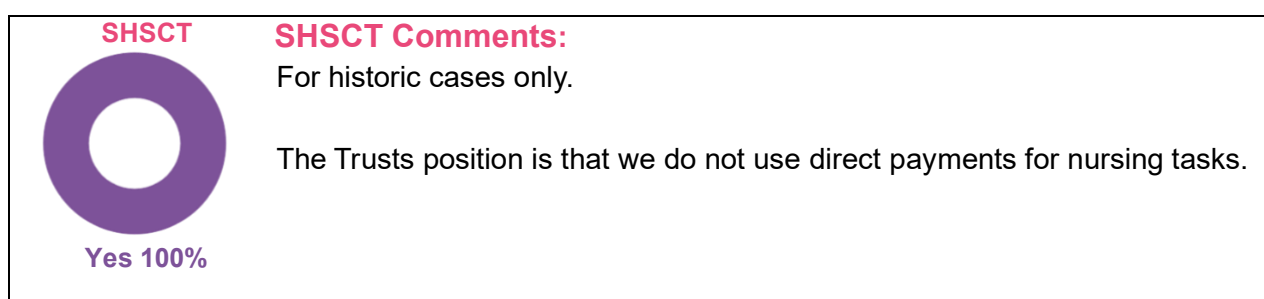
**Table 4b: Nurse delivered the training for personal assistants associated with the tasks or care delegated**



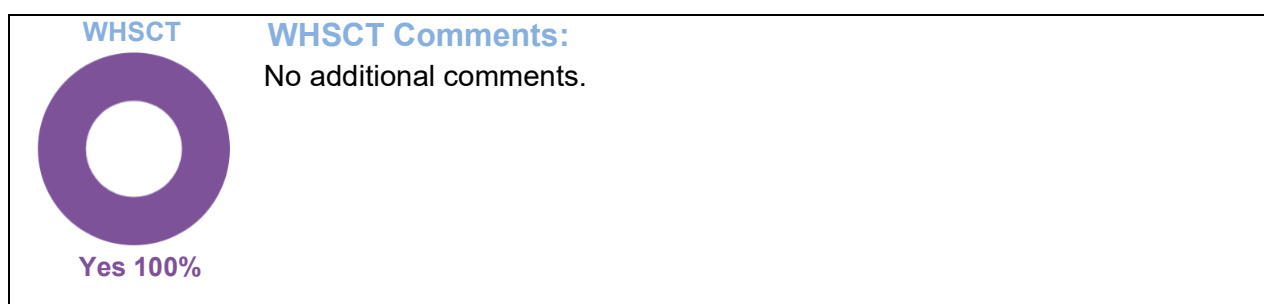
**Table 4c: Nurse delivered the training for personal assistants associated with the tasks or care delegated**



**Table 4d: Nurse delivered the training for personal assistants associated with the tasks or care delegated**



**Table 4e: Nurse delivered the training for personal assistants associated with the tasks or care delegated**



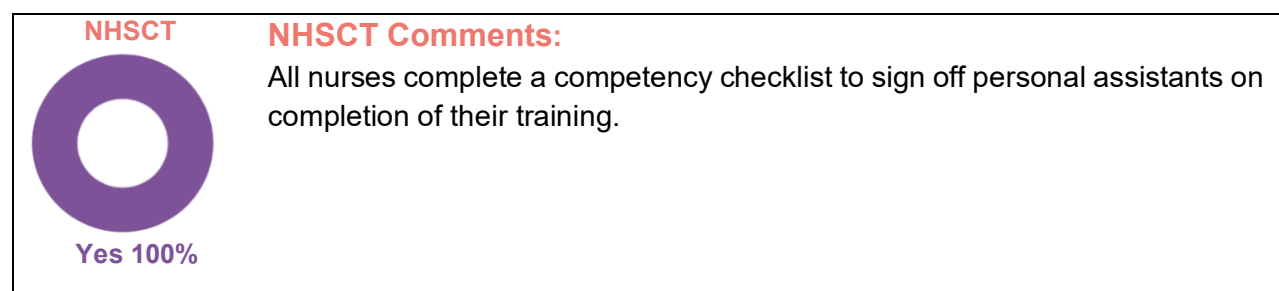
### **Summary of key findings: Nurse delivered the training for personal assistants associated with the tasks or care delegated**

Key findings from the responses submitted suggest a variation in local practices. Table 4a, 4c, 4d and 4e presents; four Trusts who reported nurses delivered training for personal assistants associated with the tasks or care delegated. One Trust indicated a larger proportion of training is not delivered by nurses within Adult Learning Disability.

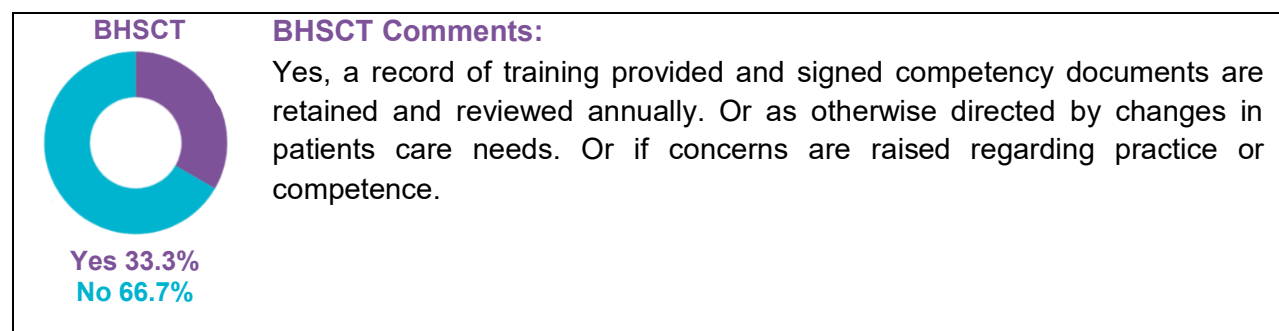
## **6. Nurse signs off the competency of the personal assistant carrying out the task or care**

Survey question 12, asked whether the nurse signs off the competency of the personal assistant carrying out the task or care. Table 5a, 5b, 5c, 5d and 5e presents the findings. The responses submitted are presented, aligned to each HSC Trust below;

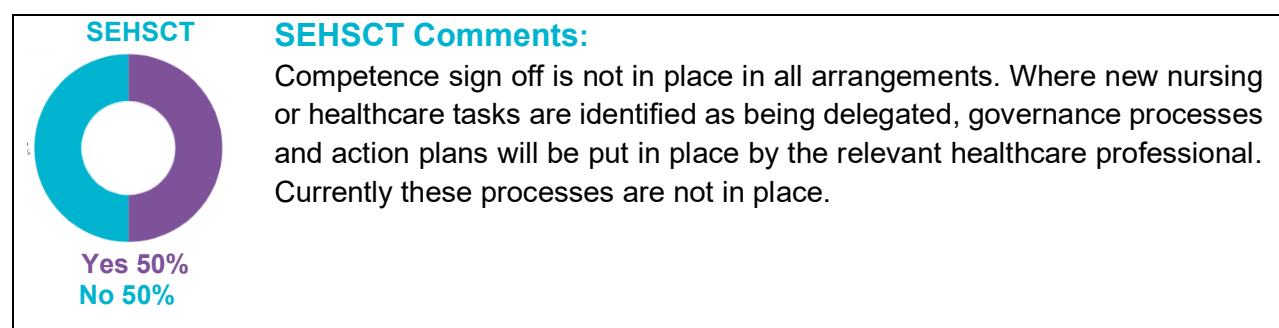
**Table 5a: Nurse signs off the competency of the personal assistant carrying out the task or care**



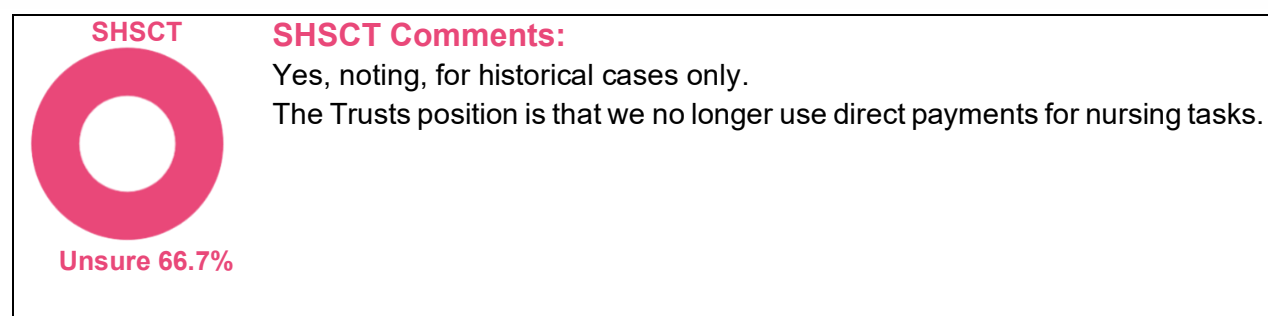
**Table 5b: Nurse signs off the competency of the personal assistant carrying out the task or care**



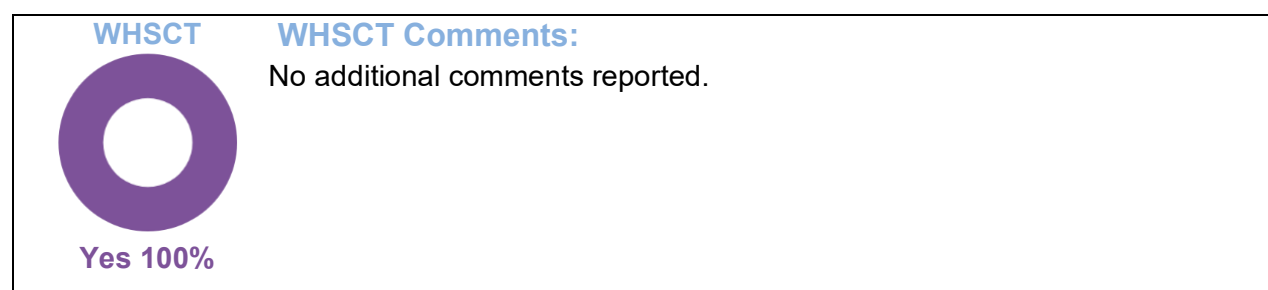
**Table 5c: Nurse signs off the competency of the personal assistant carrying out the task or care**



**Table 5d: Nurse signs off the competency of the personal assistant carrying out the task or care**



**Table 5e: Nurse signs off the competency of the personal assistant carrying out the task or care**



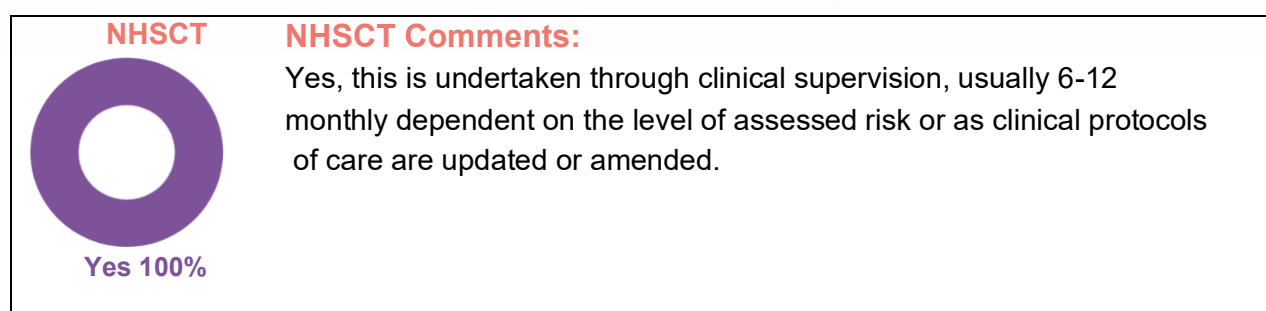
### **Summary of key findings: Nurse signs off the competency of the personal assistant carrying out the task or care**

Key findings from the responses submitted suggest a variation in local practices. Two Trusts being most similar, signing off the competency of the personal assistant carrying out the task or care. One Trust provided equal information, of nurses signing off and not signing off competency. One Trust provided mixed information, of nurses largely not signing off competency and one Trust answered an overall unsure.

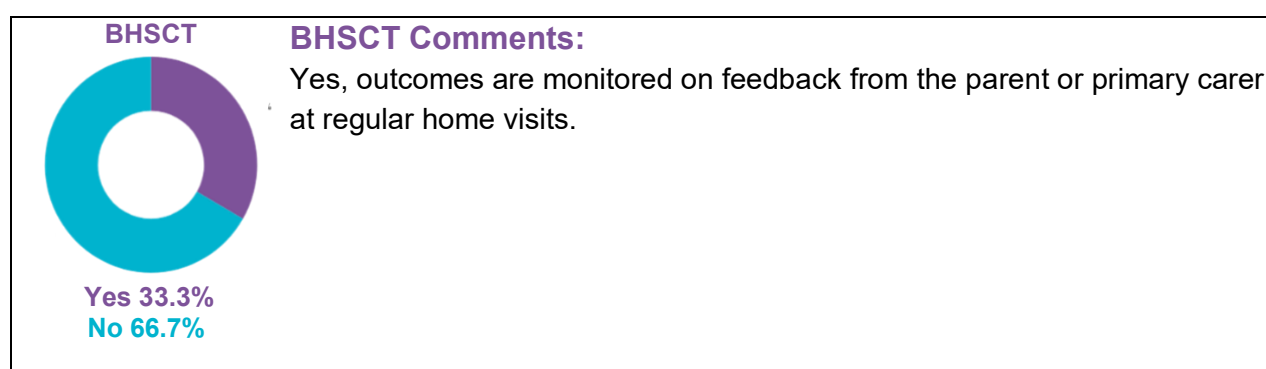
## **7. Nurse monitors the patient's outcomes related to the tasks delegated**

Survey question 14, asked whether the nurse monitors the patient outcomes related to the tasks delegated. Table 6a, 6b, 6c, 6d and 6e presents the findings aligned to each HSC Trust. The responses submitted are presented, aligned to each HSC Trust below;

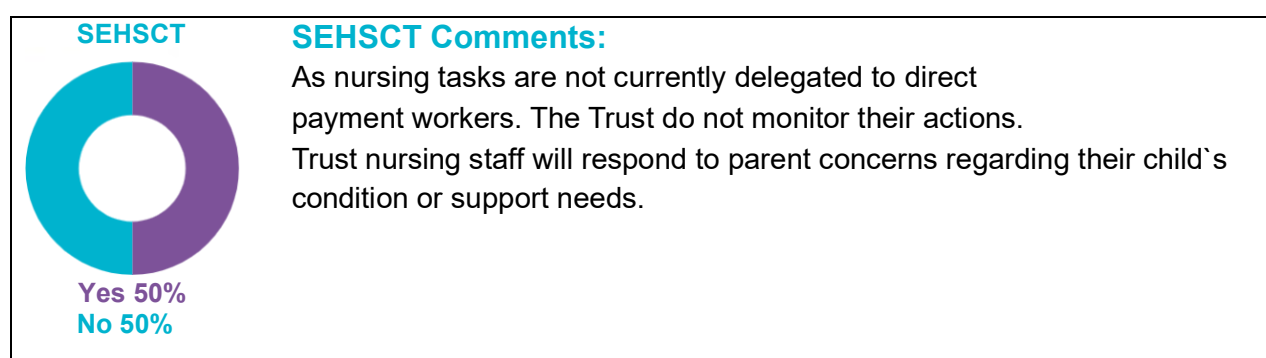
**Table 6a: Nurse monitors the patients outcomes related to the tasks delegated**



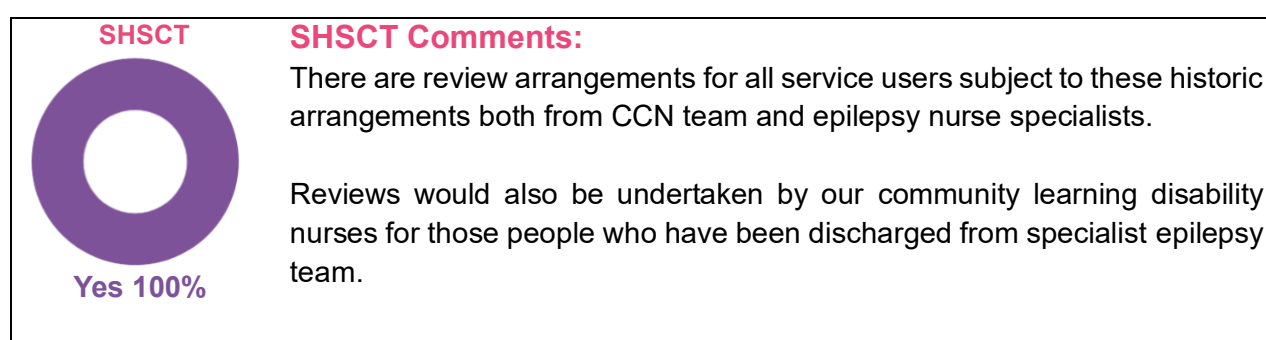
**Table 6b: Nurse monitors the patients outcomes related to the tasks delegated**



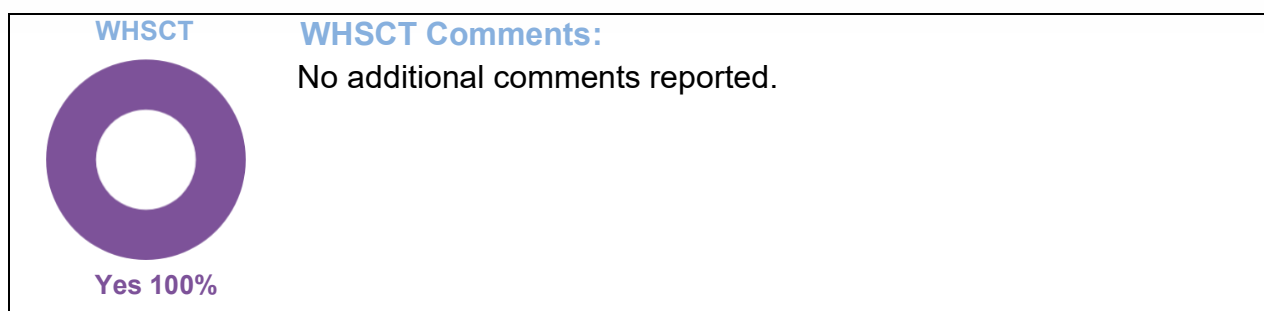
**Table 6c: Nurse monitors the patients outcomes related to the tasks delegated**



**Table 6d: Nurse monitors the patients outcomes related to the tasks delegated**



**Table 6e: Nurse monitors the patients outcomes related to the tasks delegated**



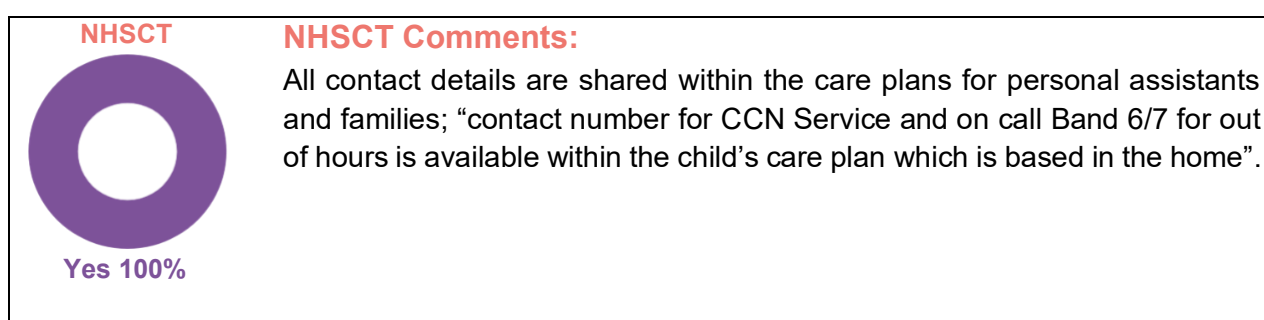
**Summary of key findings: Nurse monitors the patients outcomes related to the tasks delegated**

Key findings from the responses submitted suggest a variation in local practices across HSC Trusts. Three Trusts report monitoring the patient's outcomes related to tasks delegated. One Trust reported an equal mix of monitoring and not monitoring tasks delegated. One Trust also provided mixed information of largely not monitoring.

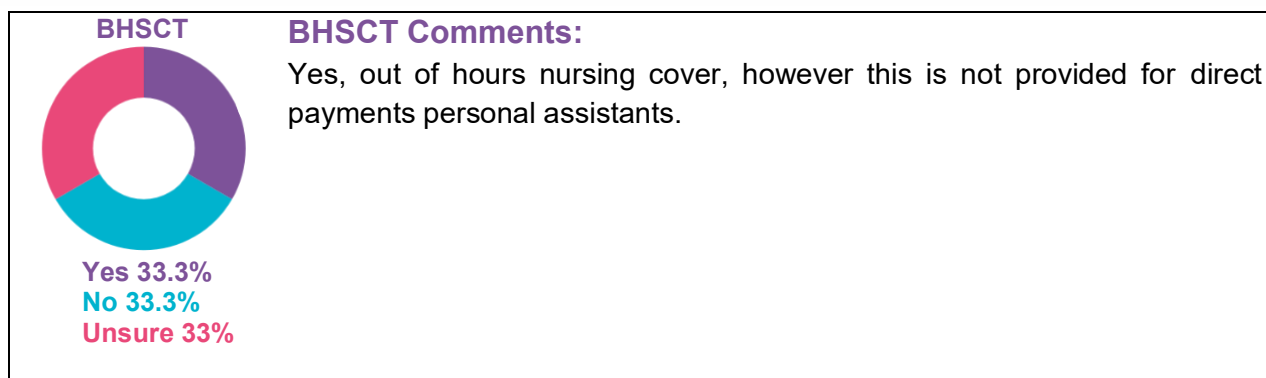
**8. An agreed contact number is clearly recorded for the personal assistant to ensure escalation back to the nurse as required**

Survey question 16 asked whether an agreed contact number is clearly recorded for the personal assistant to ensure escalation back to nursing as required. Table 7a, 7b, 7c, 7d and 7e presents the findings. The responses submitted are presented, aligned to each HSC Trust below;

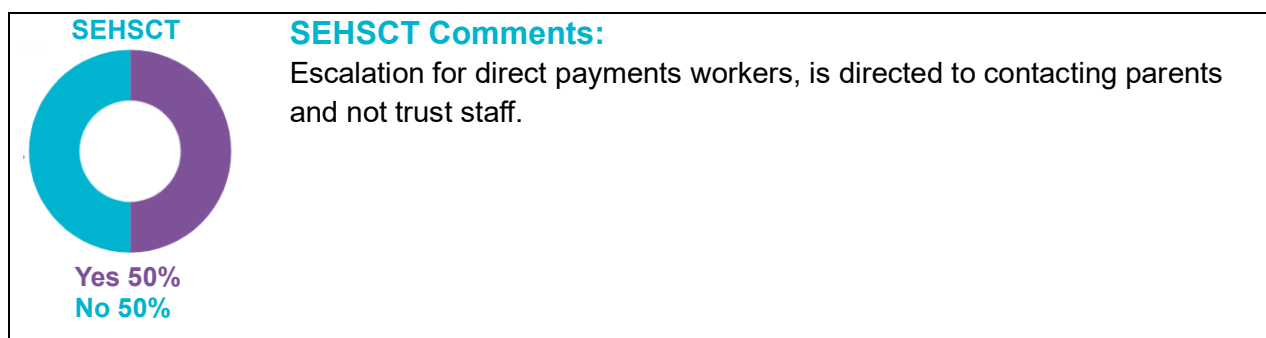
**Table 7a: An agreed contact number is clearly recorded for the personal assistant to ensure escalation back to the nurse as required**



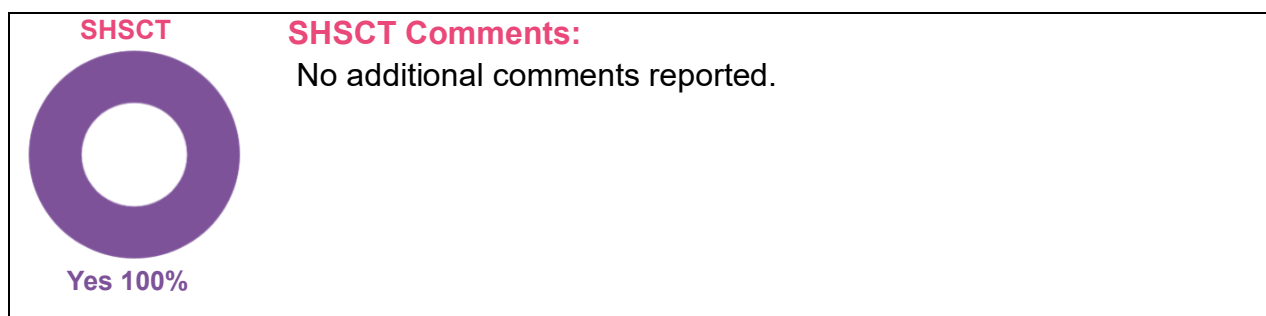
**Table 7b: An agreed contact number is clearly recorded for the personal assistant to ensure escalation back to nursing as required**



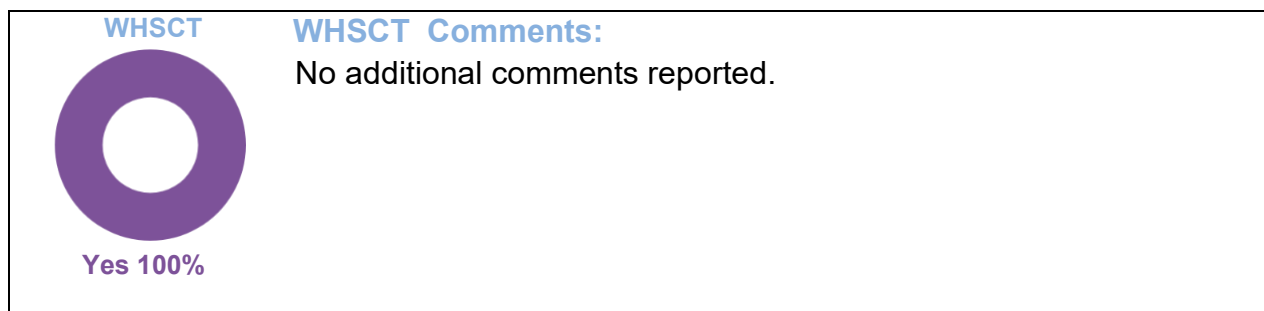
**Table 7c: An agreed contact number is clearly recorded for the personal assistant to ensure escalation back to nursing as required**



**Table 7d: An agreed contact number is clearly recorded for the personal assistant to ensure escalation back to nursing as required**



**Table 7e: An agreed contact number is clearly recorded for the personal assistant to ensure escalation back to nursing as required**



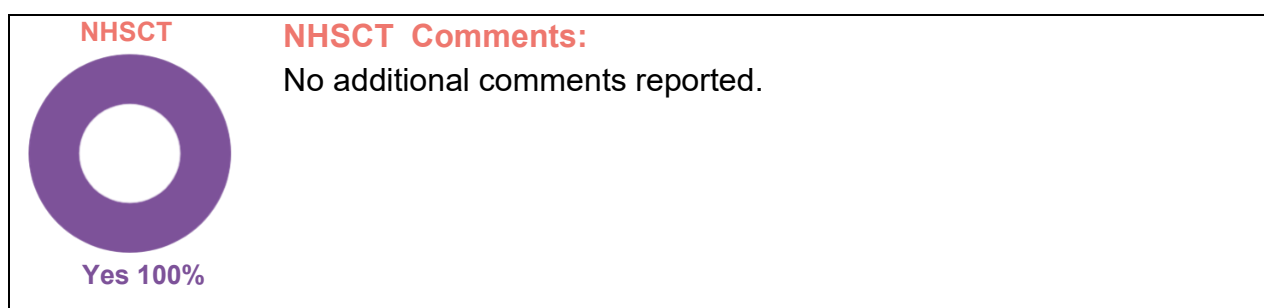
**Summary of key findings: An agreed contact number is clearly recorded for the personal assistant to ensure escalation back to nursing as required**

Key findings from the responses submitted suggest a variation in local practices across HSC Trusts. Three Trusts reported an agreed contact number is clearly recorded for the personal assistant to ensure escalation back to nursing, as required. One Trust reported an equal mix of, out of hours nursing contact number is provided in records, but not for direct payments workers and being unsure. One Trust provided equal information of providing a contact number and not providing a contact number.

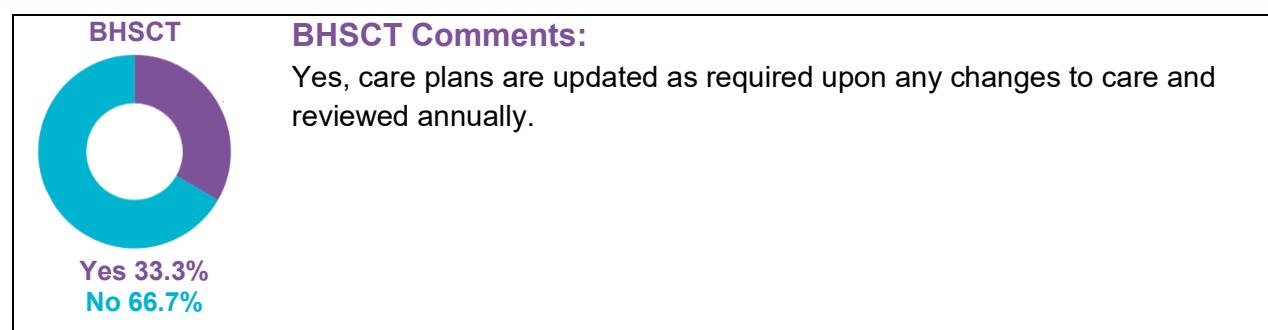
**9. Nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate**

Survey question 18 asked whether the nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate. Table 8a, 8b, 8c, 8d and 8e presents the findings aligned to each HSC Trust. The responses submitted are presented, aligned to each HSC Trust below;

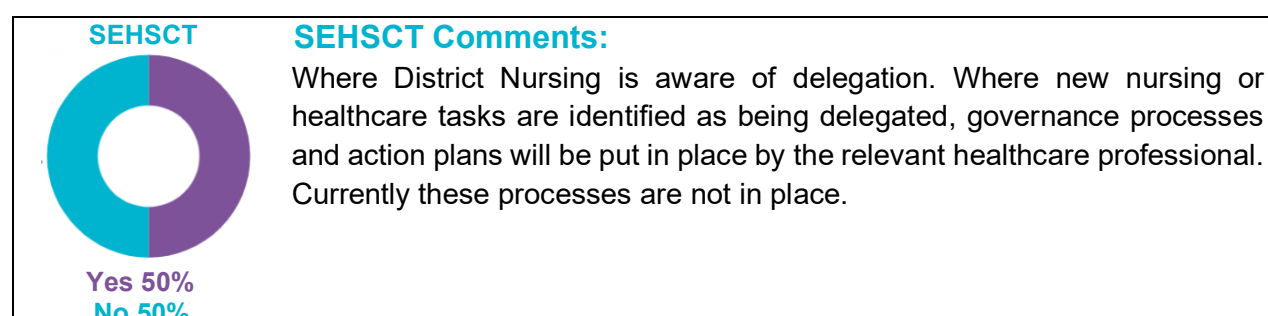
**Table 8a: Nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate**



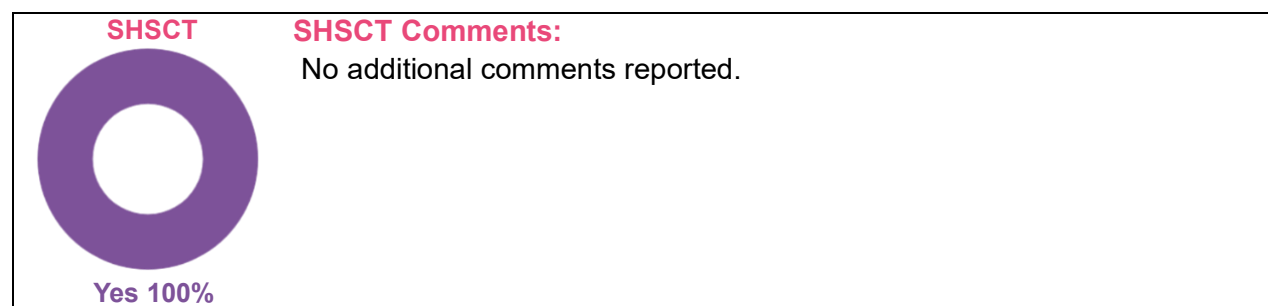
**Table 8b: Nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate**



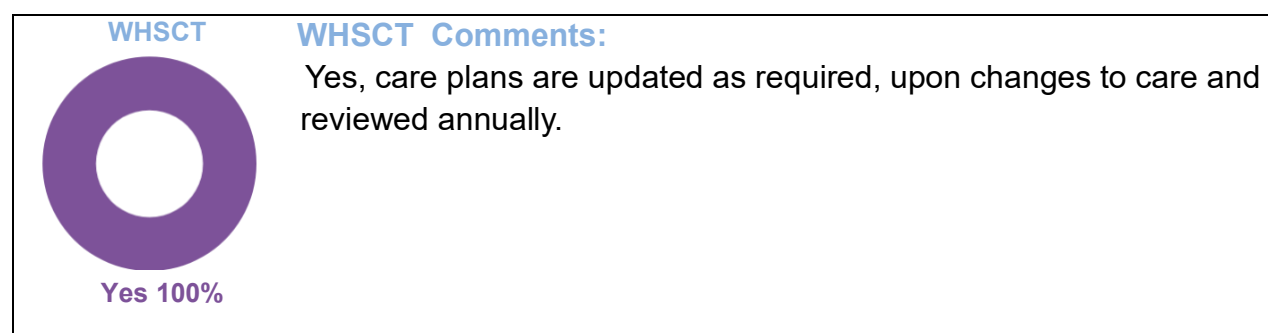
**Table 8c: Nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate**



**Table 8d: Nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate**



**Table 8e: Nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate**



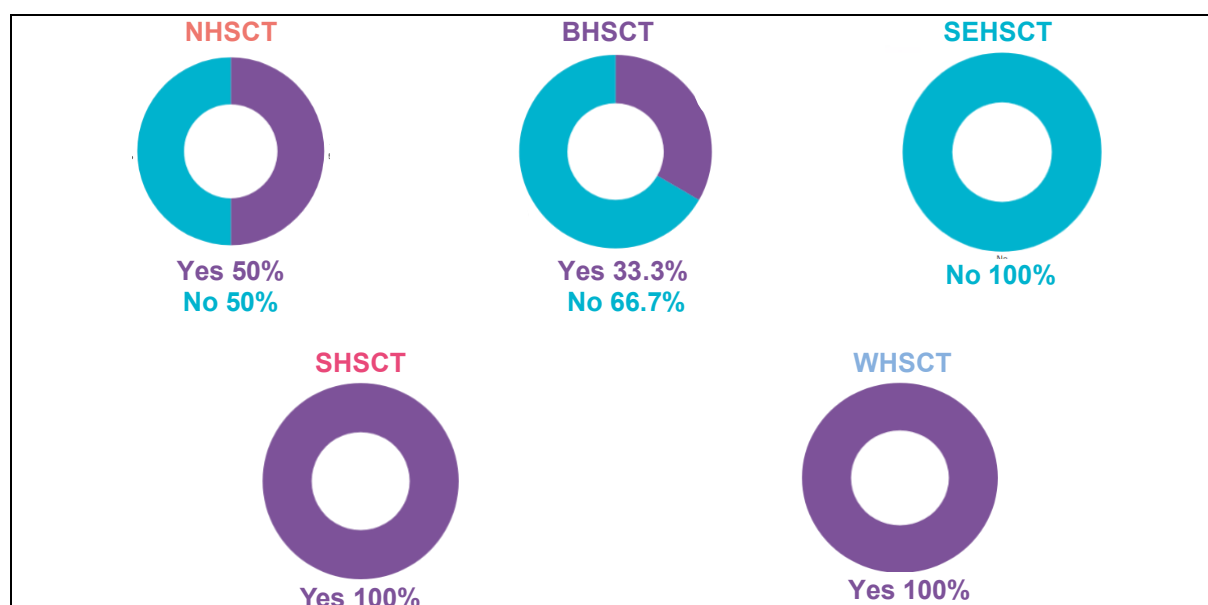
## Summary of key findings: Nurse updates clinical care plans, escalation plans, risk assessments and training as appropriate

Key findings from the responses submitted suggest a variation in local practices across HSC Trusts. Three Trusts reported nurses update clinical records, risk assessments and training as appropriate. One Trust reported a mix of nurses who provide some updates to care plans, escalation plans, risk assessments and training, but largely not providing this. One Trust also provided an equal mix of information of nurses providing updates for employed by and for Trust staff, and do not provide for direct payment workers.

## 10. Nurse maintains a key worker role for the healthcare or nursing task per HSC Trust

Survey question 20 asked whether the nurse maintains a key worker role for the healthcare or nursing task. Table 9a, 9b, 9c, 9d and 9e presents the findings. The responses submitted are presented, aligned to each HSC Trust below;

**Table 9: Nurse maintains a key worker role for the healthcare or nursing task per HSC Trust**



## Summary of key findings: Nurse maintains a key worker role for the healthcare or nursing task per HSC Trust

Key findings from the responses submitted suggest a variation in local practices across HSC Trusts. Two Trusts maintain a key worker role for the healthcare or nursing task per HSC Trust. One Trust reported an equal proportion maintain a key worker role. One Trust reported largely not maintaining a key worker role. And one Trust indicated they do not maintain a key worker role.

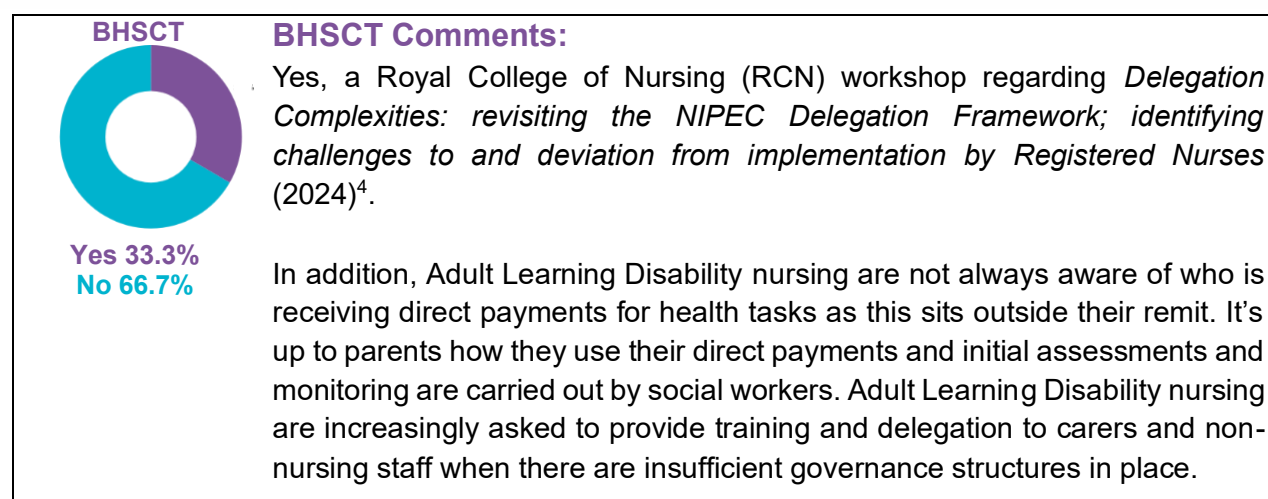
## 11. Concerns raised within nursing regarding the delegation of healthcare or nursing tasks to personal assistants

Survey question 21 asked whether there is an awareness of any concerns raised within nursing, regarding the delegation of healthcare or nursing tasks to personal assistants. Table 10a, 10b, 10c, 10d and 10e presents the findings. The responses submitted are presented, aligned to each HSC Trust below;

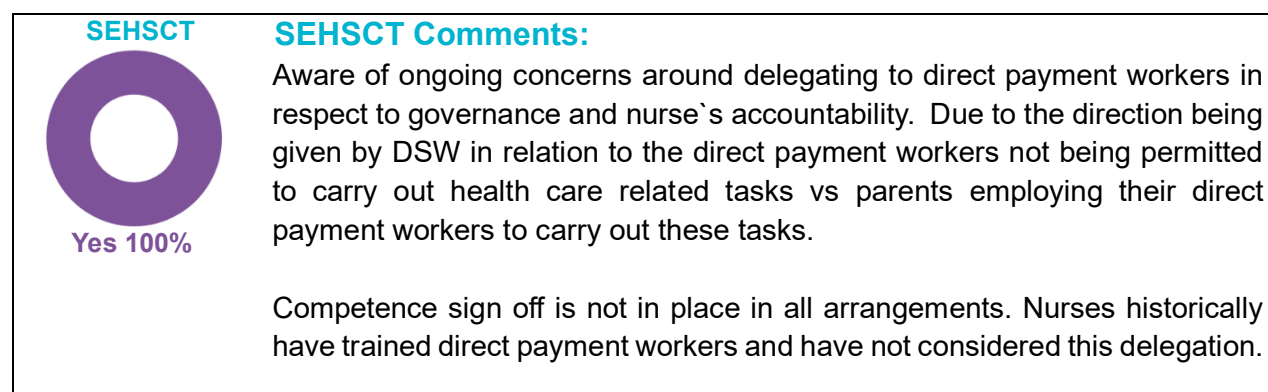
**Table 10a: Concerns raised within nursing regarding the delegation of healthcare or nursing tasks to personal assistants**

|                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>NHSCT</b></p>  <p><b>No 100%</b></p> | <p><b>NHSCT Comments:</b></p> <p>The nurse does not always assume the key worker role, as the greater assessed need may be a social need, which may be a greater need than the physical need. This is determined at multi-disciplinary team meetings at the point of referral. Nurses may co-work the case alongside the keyworker who may be a social worker. Not aware of any live issues raised by nursing regarding delegation of tasks.</p> <p>However, there is a growing anxiety across Learning Disability nursing in relation to their accountability regarding delegating nursing tasks to direct payment carers.</p> <p>Delegation of nursing care to personal assistants has been in place for approximately 17 years within childrens` nursing. The standard of training is the same as that given to Trust non-registrant employees who would be undertaking delegated nursing care. We are aware of concerns from other professionals relating to the fact that personal assistants in the main do not come with any previous “health or caring” experience. It is important to note however that delegated nursing care is also undertaken by parents as well as other non-registrant staff (e.g. the Education Authority) who would be in a similar position i.e. no previous experience. The NIPEC Delegation Framework (2019) should be applied regardless of the experience, or lack of and should only be delegated when deemed appropriate.</p> |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

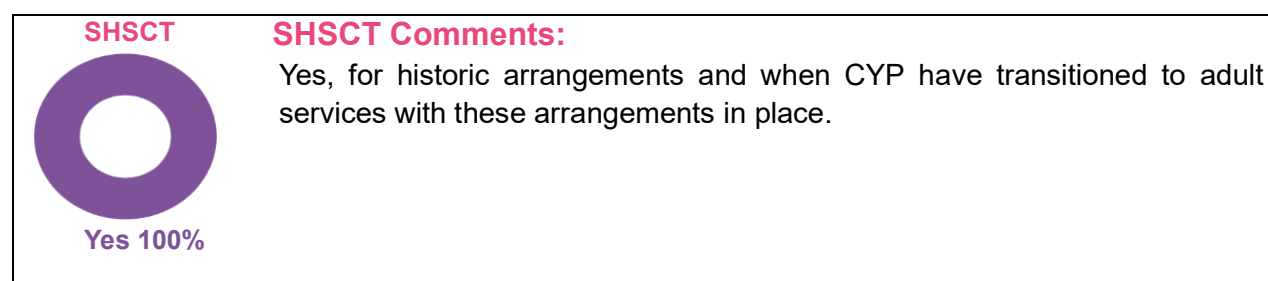
**Table 10b: Concerns raised within nursing regarding the delegation of healthcare or nursing tasks to personal assistants**



**Table 10c: Concerns raised within nursing regarding the delegation of healthcare or nursing tasks to personal assistants**



**Table 10d: Concerns raised within nursing regarding the delegation of healthcare or nursing tasks to personal assistants**



<sup>4</sup> Royal College of Nursing (RCN) (2024) *Delegation Complexities: revisiting the NIPEC Delegation Framework; identifying challenges to and deviation from implementation by Registered Nurses*. RCN: London

**Table 10e: Concerns raised within nursing regarding the delegation of healthcare or nursing tasks to personal assistants**

|                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>WHSCT</p>  <p>No 100%</p> | <p><b>WHSCT Comments:</b></p> <p>Prior to the establishment of the delegation panel there was concern and inconsistency in delegation practice. The panel acts as a supportive consistent governance process for delegating Health care Tasks to personal assistants employed through direct payments.</p> <p>Previously the concerns related to the Carers &amp; Direct Payments Act (2002)<sup>5</sup> and its position on not support the delivery of health care tasks through direct payments.</p> |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### **Summary of key findings: Concerns raised within nursing regarding the delegation of healthcare or nursing tasks to personal assistants**

Key findings from the responses submitted suggest a variation in local practices across HSC Trusts. Two Trusts reported no concerns, and two Trusts identified concerns. One Trust largely found no concerns but was aware of wider nursing concerns in relation to delegation and recognised direct payments workers are employed by parents within CCN and nurses do not delegate tasks to them.

## **12. Process to raise concerns regarding delegation of tasks or care from nursing staff to Direct Payments**

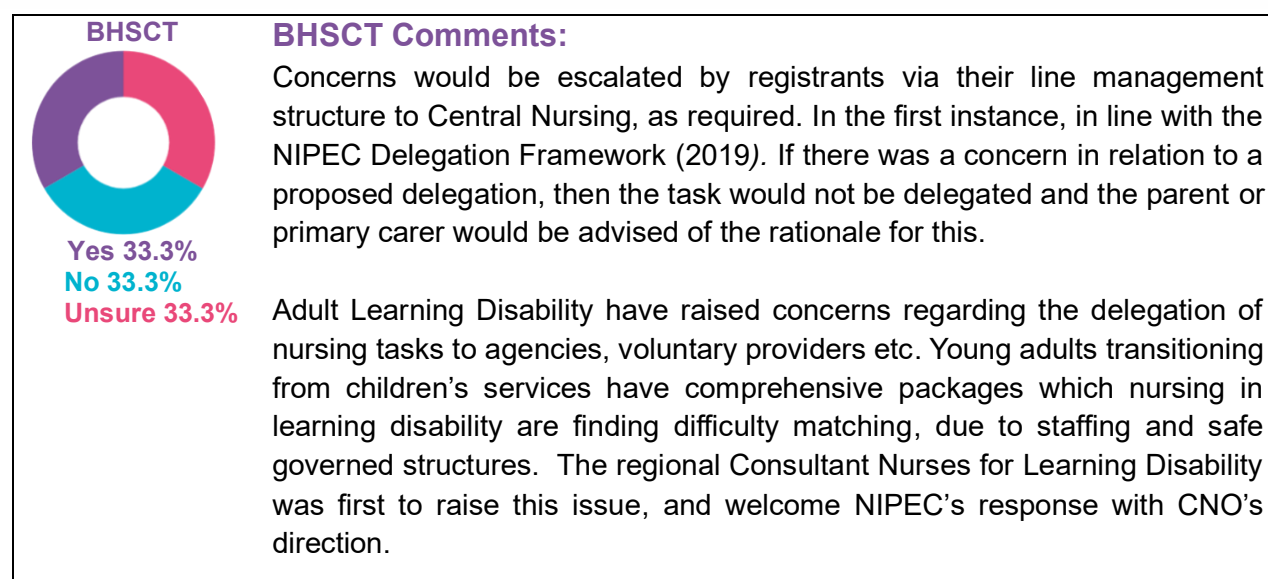
Survey question 23 asked whether there was a process to escalate concerns regarding delegation of tasks or care from nursing staff to direct payments. Table 11a, 11b, 11c, 11d and 11e presents the findings aligned to each HSC Trust. The responses submitted are presented, aligned to each HSC Trust below;

**Table 11a: Process to raise concerns regarding delegation of tasks or care from nursing staff to direct payments**

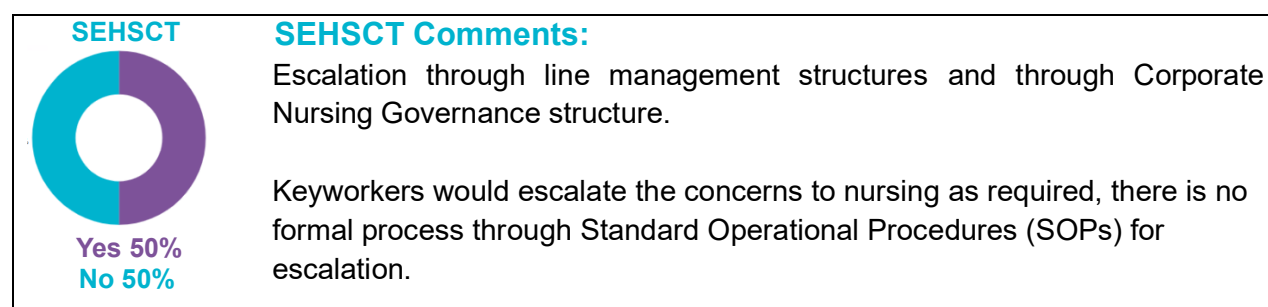
|                                                                                                                 |                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>NHSCT</p>  <p>No 100%</p> | <p><b>NHSCT Comments:</b></p> <p>Whilst there is not a formal Trust process for this, nursing staff are expected to raise any delegation concerns with their line manager for further discussion and risk management. If necessary this can be escalated to the Head of Service and Assistant Director.</p> |
|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

<sup>5</sup> Carers & Direct Payments Act (Northern Ireland) 2002<sup>5</sup>

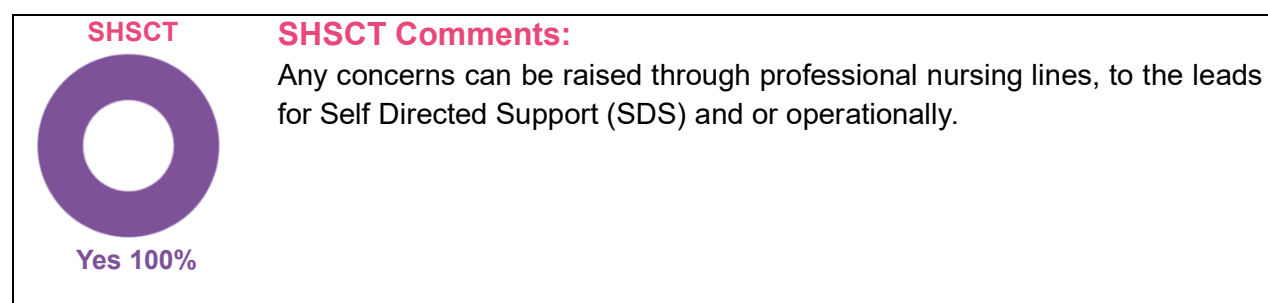
**Table 11b: Process to raise concerns regarding delegation of tasks or care from nursing staff to direct payments**



**Table 11c: Process to raise concerns regarding delegation of tasks or care from nursing staff to direct payments**



**Table 11d: Process to raise concerns regarding delegation of tasks or care from nursing staff to direct payments**



**Table 11e: Process to raise concerns regarding delegation of tasks or care from nursing staff to direct payments**

|                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>WHSCT</p>  <p>Yes 100%</p> | <p><b>WHSCT Comments:</b></p> <p>Yes, nurses who have assessed patients where support with healthcare tasks is part of a support plan to be delivered through a direct payment take their cases to a Trust Nursing Delegation Panel which is chaired by Assistant Director of Nursing. The roll and function of the panel is to review what the nurse is proposing to delegated to ensure it is:</p> <ul style="list-style-type: none"> <li>○ Safe for the patient;</li> <li>○ Protects the nurse and their registration;</li> <li>○ Is covered by the appropriate organisational governance requirements.</li> </ul> |
|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

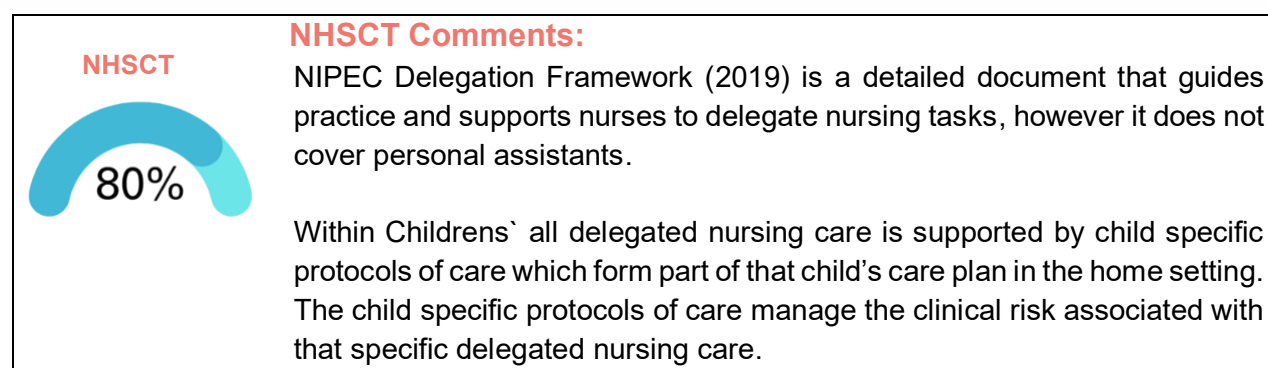
### **Summary of key findings: Process to raise concerns regarding delegation of tasks or care from nursing staff to direct payments**

All Trusts reported that if there were concerns regarding delegation of tasks or care from nursing staff to direct payments, these would be escalated. The WHSCT reported that governance arrangement where part of the remit of the Trust Delegation Panel. Whilst no formal process was reported by the other HSC Trusts the NIPEC Delegation Framework (2019) professional line management support and Corporate Nursing Governance structures were cited as mechanisms that would be used to manage and escalate concerns.

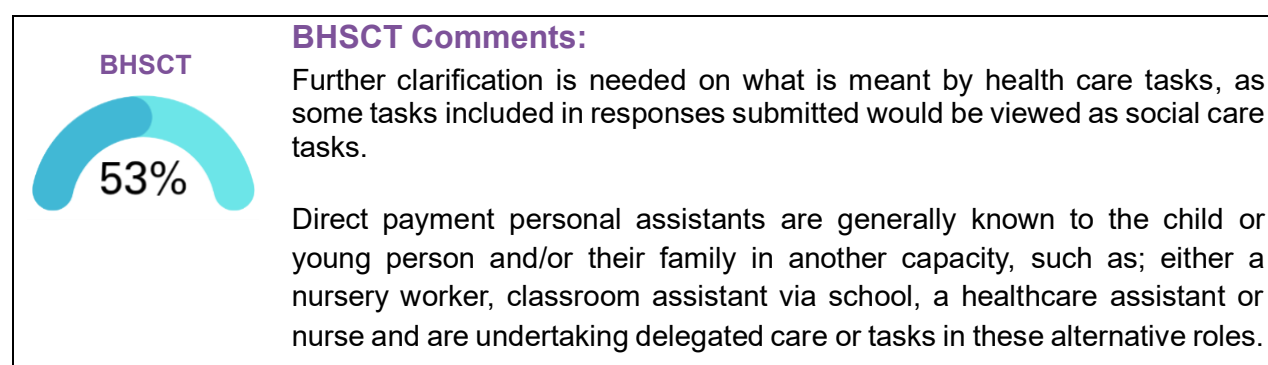
### **13. Reported robustness of governance processes for healthcare and nursing tasks to personal assistants**

Survey question 25, asked each HSC Trust to indicate the robustness of the governance processes for healthcare and nursing tasks to personal assistants based on the NIPEC Delegation Framework (2019) on a Likert scale of 1- 5. Table 12a, 12b, 12c, 12d and 12e presents these findings. The responses submitted are presented, aligned to each HSC Trust below;

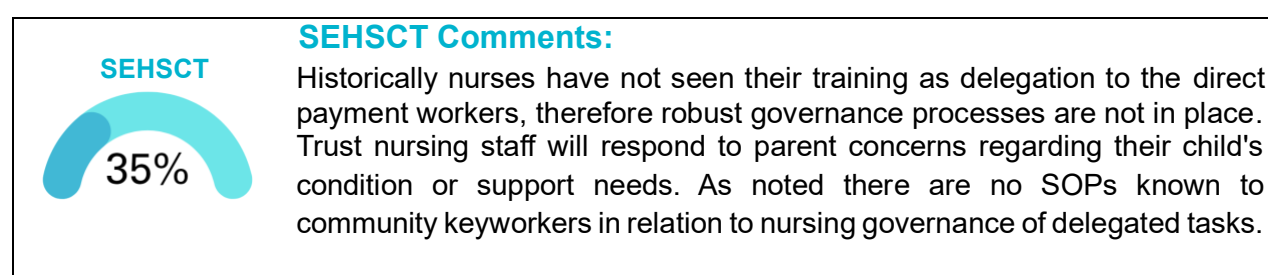
**Table 12a: Reported robustness of governance processes for healthcare and nursing tasks to personal assistants**



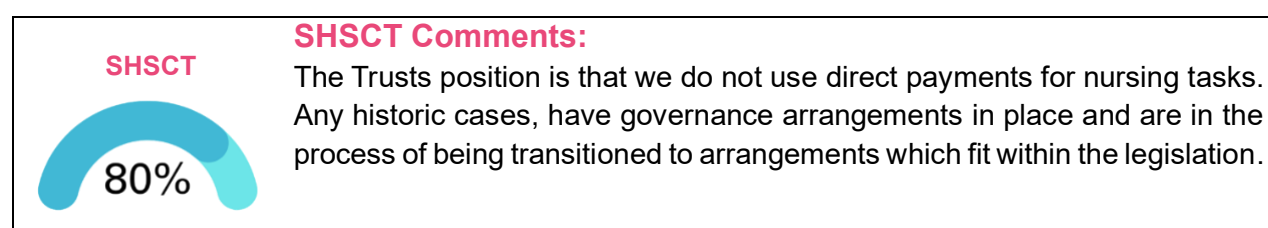
**Table 12b: Reported robustness of governance processes for healthcare and nursing tasks to personal assistants**



**Table 12c: Reported robustness of governance processes for healthcare and nursing tasks to personal assistants**



**Table 12d: Reported robustness of governance processes for healthcare and nursing tasks to personal assistants**



**Table 12e: Reported robustness of governance processes for healthcare and nursing tasks to personal assistants**

|                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>WHSCT</b></p>  <p>80%</p> | <p><b>WHSCT Comments:</b></p> <p>There is an area of ambiguity in relation to school nurses and their support to children with healthcare needs in the education setting, where these children are not on a nursing caseload. This needs to be examined through this work.</p> <p>We do not delegate healthcare tasks where there is a contract for the provision of service (Nursing Homes / Day Care / Contracted Domiciliary Care), we expect these services to have their own nursing resource and governance arrangements in place but this perhaps needs to be strengthened in regional contracts and service specifications.</p> |
|------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### **Summary of key findings: Key findings reported robustness of governance processes for healthcare and nursing tasks to personal assistants**

Three of the five trusts reported that they were 80% assured in relation to the robustness of governance processes for healthcare and nursing tasks to personal assistants. One Trust rated their assurance in relation to governance processes at 35%.

The NIPEC Delegation Framework (2019) was cited as a tool that guides practice and supports nurses to delegate nursing tasks, however it does not cover personal assistants. In the comments sections issues were raised and included, the need for further clarification on what is meant by health care tasks, ambiguity in relation to school nurses and their support to children with healthcare needs in the education setting, where these children are not on a nursing caseload.

## **5.0 Key Messages**

The final survey question 27 asked each HSC Trust if they had any additional information they would like to submit to support the outcomes of this survey. Table 12a, 12b, 12c, 12d and 12e presents these findings. The responses submitted are presented, aligned to each HSC Trust below;

### **Table 12a: Additional suggested comments per HSC Trust to support the outcomes of this scoping exercise**

### NHSCT Comments:

**A Regional Policy** regarding delegation may assist to standardise service provision, and support nurses in practice whilst ensuring equity of access for service users.

**Families** continue to articulate that they want **choice and flexibility** with regard to their support packages. The option of the use of direct payments for children with complex physical healthcare needs should continue to be considered with regards to providing a flexible support service for this group of children and young people. For a number of the CCN complex packages of care within the NHSCT, direct payment carers can form all or part of the support to an individual child and their parent or guardian.

Currently there is also **difficulty in attracting and recruiting** suitable candidates to Trust Band 3 Senior Nursing Assistant posts. Without the option of the use of direct payments carers, service provision for a number of complex packages would be at a critically low level.

One of the Paediatric Lead Nurses has recently undertaken a regional Nursing & Midwifery Quality Improvement Programme (2024). The title of her project is "To Delegate or Not to Delegate?" The aim of this project is **to improve the recording of evidenced decision making** by registrants in the delegation process of nursing care to non-registrants within the CCN support packages.

## 12b: Additional suggested comments per HSC Trust to support the outcomes of this scoping exercise

### BHSCT Comments:

Self-directed support is **commissioned by care management staff** within mental health in BHSCT, these staff can be from any professional background and are not necessarily nurse qualified, hence the responses.

ACOPS division in BHSCT only provide direct payments for social care tasks. There is an **increase in demand for flexible care options** for children and young people with complex health needs in order for them to undertake daily living activities. There are limited respite care options, particularly as children with complex needs increase in age and families often prefer individuals known to them that they can pay to provide care rather than having 'strangers' in their home. The **demand for care outweighs the capacity** for available Trust contracted staff. **Recruitment** is becoming increasingly challenging into such posts.

Adult Learning Disability welcome a regional approach, to give greater clarity and assurance to the Registered Nurse Learning Disability. Adult Learning Disability community programme are committed to providing safe and effective care and recognise the changing requirements that people with learning disability and their family/careers request and need. Further work on this is welcomed and very timely.

**Table 12c: Additional suggested comments per HSC Trust to support the outcomes of this scoping exercise**

**SEHSCT Comments:**

There are no additional comments reported.

**Table 12d: Additional suggested comments per HSC Trust to support the outcomes of this scoping exercise**

**SHSCT Comments:**

There is comprehensive information available on our SharePoint site to guide and support relevant staff in this area. In addition to senior people in SDS to provide advice and guidance. There have been some situations which have come to light. These can be grouped under 3 types of situations:

- **Parent or carer**, without key worker knowledge **have trained up their personal assistants** after feeling confident that they could manage specific tasks. One such situation came to light within Learning Disability transition.
- In some high package cases (where the individual has health care needs as well as social care needs) the arrangements are not as robust as they should be i.e. a comprehensive support plan should be completed in all these situations to clearly outline and agree all arrangements, **to separate out health and social care need** and agree what the direct payments **can and cannot be used for**, with ongoing monitoring in place. In the above situation the team involved in managing the case before transition **agreed to amend their protocols** and to complete a more comprehensive support plan in this type of presenting need.
- In most situations it is clear, but there may be some confusion as to **what is a health care task and what is not a health care task**.

**Table 12e: Additional suggested comments per HSC Trust to support the outcomes of this scoping exercise**

**WHSCT Comments:**

There is an **area of ambiguity** in relation to school nurses and their support to children with **healthcare needs in the education setting**, where these children **are not on a nursing caseload**. This needs to be examined through this work.

We **do not delegate healthcare tasks** where there is a **contract for the provision of service** (Nursing Homes / Day Care / Contracted Domiciliary Care), we expect these services to have their own nursing resource and governance arrangements in place but this perhaps **needs to be strengthened in regional contracts and service specifications**.



### **Summary of key messages: Additional suggested comments from HSC Trusts to support the outcomes of this scoping exercise**

Key messages suggested from all HSC Trusts to support the outcomes of this scoping exercise, include; providing a consistency of approach to delegation, creating a standardisation within services and across HSC Trusts. To regionally agree the strengthening of practices, processes and the sharing of best practices. To address current ambiguities with clear direction. This will enable and establish greater confidence supporting nurses and provide equity of access and choice for service users, carers and families.

## Appendix 1

### Scoping Survey of HSC Trust Delegated Healthcare and Nursing Tasks under Direct Payments August 2024

|                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Question 1.</b> Trust:                                                                                                                                                                                                                  |
| <i>Free Text response</i>                                                                                                                                                                                                                  |
| <b>Question 2.</b> Name and designation of responder                                                                                                                                                                                       |
| <i>Free Text response</i>                                                                                                                                                                                                                  |
| <b>Question 3.</b> Within your Trust can you provide the <b>approximate number</b> of clients where <b>healthcare or nursing</b> tasks are being supported through Direct Payments                                                         |
| <i>Free Text response</i>                                                                                                                                                                                                                  |
| <b>Question 4.</b> Please provide a high-level breakdown of <b>programmes of care or services</b> where <b>healthcare or nursing</b> tasks are being supported through Direct Payments                                                     |
| a. Learning Disability Adults                                                                                                                                                                                                              |
| b. Learning Disability Children`s                                                                                                                                                                                                          |
| c. Children's                                                                                                                                                                                                                              |
| d. Primary Care/Older Peoples Services                                                                                                                                                                                                     |
| e. Mental Health Adults                                                                                                                                                                                                                    |
| f. CAHMS                                                                                                                                                                                                                                   |
| g. Other                                                                                                                                                                                                                                   |
| <b>Question 5.</b> Please give details of other if selected                                                                                                                                                                                |
| <i>Free Text response</i>                                                                                                                                                                                                                  |
| <b>Question 6.</b> Please provide information regarding the type of <b>healthcare or nursing care</b> or tasks that are being carried out by the personal assistant employed through Direct Payments - this list is not an exhaustive list |
| h. Medication Administration                                                                                                                                                                                                               |
| i. Feeding                                                                                                                                                                                                                                 |
| j. Complex Manual Handling                                                                                                                                                                                                                 |
| k. Tracheostomy Care                                                                                                                                                                                                                       |
| l. Enteral tube feeding                                                                                                                                                                                                                    |
| m. Management of challenging behaviour                                                                                                                                                                                                     |
| n. Wound dressings/compression hosiery                                                                                                                                                                                                     |
| o. Bowel management/enemas etc                                                                                                                                                                                                             |
| p. Urinary catheter care                                                                                                                                                                                                                   |
| q. Diabetes management                                                                                                                                                                                                                     |
| r. Palliative and End of Life Care                                                                                                                                                                                                         |
| s. Vital Signs Monitoring e.g. temperature, pulse, blood pressure                                                                                                                                                                          |
| t. Emergency medication or interventions for epilepsy                                                                                                                                                                                      |
| u. other                                                                                                                                                                                                                                   |
| <b>Question 7.</b> Please give details of other if selected                                                                                                                                                                                |
| <i>Free Text response</i>                                                                                                                                                                                                                  |
| <b>Question 8.</b> Governance: Does the nurse carryout a nursing assessment and risk assessment prior to delegation of the task?                                                                                                           |
| Yes, No & Unsure options                                                                                                                                                                                                                   |
| <b>Question 9.</b> Additional comments                                                                                                                                                                                                     |
| <i>Free Text response</i>                                                                                                                                                                                                                  |
| <b>Question 10.</b> Does the Nurse carryout training for personal assistants associated with the tasks or care delegated                                                                                                                   |

|                                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 11.</b> Additional comments                                                                                                                                                                                                        |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 12.</b> Does the nurse sign off the competency of the personal assistant carrying out the task/care                                                                                                                                |
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 13.</b> Additional comments                                                                                                                                                                                                        |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 14.</b> Does the nurse monitor the patient outcomes related to the tasks delegated?                                                                                                                                                |
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 15.</b> Additional comments                                                                                                                                                                                                        |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 16.</b> Is there an agreed contact number clearly recorded for the personal assistant to ensure escalation back to nursing care as required                                                                                        |
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 17.</b> Additional comments                                                                                                                                                                                                        |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 18.</b> Does the nurse update clinical care plans, escalation plans, risk assessments and training as appropriate                                                                                                                  |
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 19.</b> Additional comments                                                                                                                                                                                                        |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 20.</b> Does the nurse maintain a key worker role for the nursing/healthcare tasks delegated to personal assistants?                                                                                                               |
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 21.</b> Are you aware of any concerns raised within nursing regarding delegation of healthcare/nursing tasks to Personal Assistants                                                                                                |
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 22.</b> Please provide further detail                                                                                                                                                                                              |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 23.</b> Is there a process within your Trust to escalate concerns regarding delegation of tasks/care from Nursing staff to Direct Payments                                                                                         |
| Yes, No & Unsure options                                                                                                                                                                                                                       |
| <b>Question 24.</b> Please provide further detail                                                                                                                                                                                              |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 25.</b> How robust on a scale of 1 - 5 are the governance processes for nursing/healthcare tasks to personal assistants based on the NIPEC delegation framework (subjective view) - 1 being not robust at all - 5 extremely robust |
| Scale of 1-5                                                                                                                                                                                                                                   |
| <b>Question 26.</b> Additional Comments                                                                                                                                                                                                        |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 27.</b> Have you any further information/questions you would like to submit to support the outcomes of this survey?                                                                                                                |
| <i>Free Text response</i>                                                                                                                                                                                                                      |
| <b>Question 28.</b> Date of Response                                                                                                                                                                                                           |



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**June 2026**