

A Competency Framework for Transfusion Practitioners (Wales)

ALL WALES TRANSFUSION PRACTITIONER COMPETENCY FRAMEWORK

Introduction

This Transfusion Practitioner (TP) Competency Framework describes the core knowledge and skills required to undertake the TP role. The role of the TP is to ensure the safe and appropriate transfusion of blood components and blood products. The role can be undertaken by a variety of healthcare professionals including: nurses, midwives and biomedical scientists in Wales. It has been recognised that the role of the TP varies significantly on an international level ¹. This is also reflected in job descriptions across Wales and may in part be due to the diverse qualifications and background of those undertaking the role and the differing organisational needs.

However, there are fundamental core skills required by TPs, which have been identified in this Framework. The aim of this framework is to establish standardised practice within the role of the TP whilst also acknowledging that the role is diverse and multifaceted in nature and dependent on local organisational requirements.

We envisage that this framework will be used to establish a standardised approach to training and development activities for TPs in Wales in conjunction with supporting the induction process for new hospital TP posts. In the longer term, it may also be used for recruitment and retention into the TP role. Additional benefits identified are:

- To support Continuing Professional Development (CPD) activities and identify specific training needs on an individual TP level
- To help managers and individuals identify gaps in practice
- To identify organisational level specific training needs
- To inform the commissioning, development and delivery of education and training for the TP community

Qualifications

NMC Registered nurse or midwife; or

HCPC Registered Biomedical Scientist or Operating Department Practitioner

It is recommended that there is evidenced postgraduate level knowledge of blood transfusion, and a teaching or assessing qualification

It is recommended that training in coaching and mentoring is undertaken

It is recommended that the Transfusion Practitioner undertakes Leadership development opportunities

Structure of Framework

The framework is based on Benner's from Novice to Expert stages of clinical competence nursing model², which is identified as follows:

- Competent TP (Level 2)
- Experienced TP (Level 3)
- Expert/specialist nurse TP (Level 4)

It is expected that all new Transfusion Practitioners will have achieved level 1 (novice) and 2 (advanced beginner) within transfusion practice and so will start at the competence stage for initial training in the role.

It is set out into 8 domains:

1. Clinical (CL)
2. Communication (CO)
3. Professional and Quality Issues (PQI)
4. Strategy, Management and Leadership (SML)
5. Education and Professional Development (EPD)
6. Audit and Research (AR)
7. Emotional and Mental Effort (EME)
8. General (G)

| Competency CL (Clinical) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--------------------------|---|---|---|---|
| CL1 | <p>Protects patients from harm by promoting the safe and effective use of blood components to all those involved in the transfusion process, improving the use of a valuable and limited resource by providing:</p> <ul style="list-style-type: none"> • Education • Advice • Strategies appropriate to situations • Appropriate examples of practice | <p>Demonstrates an understanding of the principles of safe and effective use of blood strategies and offers training and support in accordance with Health board policies. Recognising limitations to their knowledge base.</p> | <p>Actively participates in the design and implementation of safe transfusion practice strategies and local policies/procedures.</p> | <p>Creates and coordinates improvement initiatives including policies, educational materials to ensure safe and appropriate use of blood components within the local Health Board and in collaboration with colleagues from other Health Boards in Wales.</p> |
| CL2 | <p>Uses education, training and providing expert advice to proactively manage blood usage and avoid unnecessary transfusion by:</p> <ul style="list-style-type: none"> • Promoting the use of blood conservation strategies • Providing advice on alternatives to blood including: <ul style="list-style-type: none"> ○ Pre-operative anaemia management (Iv/oral iron therapy) ○ Intra-operative Cell Salvage (ICS) ○ Post-operative anaemia management (single unit transfusion/ IV iron therapy) | <p>Possesses a general understanding of blood conservation principles and alternatives available.</p> | <p>Works collaboratively with hospital transfusion colleagues to promote blood conservation and alternatives within the Health Board.</p> | <p>Challenges limitations to blood conservation and leading initiatives and change within local Health Board and in collaboration with colleagues from other Health Boards in Wales.</p> |

| Competency CL (Clinical) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--------------------------|--|---|---|---|
| CL3 | Improves patient safety by designing, promoting and delivering an education, training and competency assessment programme to all staff involved in the transfusion process within the Health Board. | Takes an active part in providing education, training and competency assessments to staff within the Health board, involved in the transfusion process. | Actively participates in the design and implementation of education, training and competency assessment strategies. | Develops and implements local and national educational materials and resources in collaboration with other TP and blood transfusion experts nationally. Supports colleagues in the delivery of blood transfusion education. |
| CL4 | Encourages clear communication and collaborative working between Laboratory and Clinical colleagues to provide safe and effective care to patients, while providing expert advice to staff involved in the transfusion process. | Demonstrates an understanding of the principles and benefits of clear and effective communication and be able to demonstrate good communication skills within a multidisciplinary team. | Consistently demonstrates clear and effective communication skills in a wide range of clinical settings. | Promotes and encourages clear and effective communication and manages difficult situations with professionalism and understanding. |
| CL5 | Uses professional thinking, knowledge and expertise to lead and co-ordinate the review and update of any policies, procedure and guidelines relating to Transfusion, to ensure they reflect the most up to date National guidance and recommendations. | Possesses sufficient knowledge to inform local policies and procedures and an awareness of national guidance relating to transfusion. | Possesses a sound knowledge of local and national policies and guidelines relating to transfusion and able to contribute to policy design and implementation. | Possesses expert knowledge on local and national guidelines. Leads on the implementation of national recommendations to inform safe transfusion practice. |

| Competency CL (Clinical) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--------------------------|--|---|--|---|
| CL6 | Coordinates and implements changes in Transfusion processes and practices to improve patient safety and promote Quality improvement, measured by clinical audit. | Assists in change management in relation to clinical audit recommendations and recognise areas for improvement. | Actively participates in the change management process. | Identifies and makes recommendations for improvements to transfusion practice. Leads on the change process. |
| CL7 | Promotes the use of Local and National patient information leaflets/resources to facilitate informed decision making regarding the benefits and risks of Blood Transfusion. | Possesses knowledge of the various patient information materials and resources available and assists in the distribution. | Promotes and disseminates the use of patient information to staff and patients. | Works collaboratively with transfusion colleagues to design and implement patient information resources, locally and nationally. |
| CL8 | Promotes awareness of transfusion by providing accessible educational information and resources to Health Board staff by means of e.g.: <ul style="list-style-type: none"> • TP information web page • Training information • Policies, procedure and guidelines. | Demonstrates an understanding of the educational information available and its importance and relevance to transfusion practice. | Contributes to the content and design of educational information and resources. Also involved in the review and development of transfusion policies, procedures and guidelines. | Responsible for the development and dissemination of all transfusion related information, educational materials and resources. |
| CL9 | Acts as patient advocate at all times, ensuring safe and effective care is given based on patients wants and needs. | Understands the importance of patient advocacy in transfusion and able to tailor care to meet the needs or wishes of each individual. | Confident and competent to act as patient advocate for transfusion practice and direct other healthcare professionals as appropriate in order to meet the holistic needs of the patient. | Promotes, supports and advises on patient advocacy for transfusion nationally and across the health board and influence practice. |

| Competency CL (Clinical) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--------------------------|--|--|--|--|
| CL10 | Ensures patients wishing to refuse a Blood Transfusion fully understand and accepts the potential risks involved in making an informed decision. Ensures that the relevant information is available to all Health Care staff involved in this process to facilitate discussion. | Shows awareness of the patients' right to receive sufficient information to make an informed choice including the right refuse treatment. | Works collaboratively with blood transfusion colleagues and external agencies to ensure information is readily available, relevant and up to date. Provides support to staff and patients in the decision making process. | Provides expert advice to patients and staff particularly when difficult and emotional situations occur. Coordinate and direct healthcare staff in achieving the best possible outcome for the patient, taking into account treatment alternatives etc. |
| CL11 | Promotes local Clinical Governance programmes and initiatives to improve transfusion practice and comply with current legislation. | Demonstrates an awareness of clinical governance initiatives and promotes practice in accordance with transfusion legislation. | Demonstrates a sound understanding of clinical governance programmes and actively participates in transfusion practice improvement initiatives. | Challenges and leads on practice development initiatives and assists with the design and implementation of transfusion clinical governance programmes at a local and national level. |
| CL12 | Investigates transfusion related incidents and near misses within the Health Board. Develop action plans with effective and appropriate corrective and preventative measures to reduce the risk of reoccurrence to improve patient safety and ensure positive patient outcomes. Shares and disseminates lessons learnt and recommendations with all staff involved. | Recognises and reports on transfusion incidents and near misses within the health board. Has an understanding of the local and national reporting systems. | Actively participates in the investigation of blood transfusion related incidents. Also involved in the re-training, competency assessment and support of staff involved in transfusion incidents. | Takes the lead on investigation, management and the development of action plans relating to transfusion incidents and makes recommendations based on the findings. Shares learning with those involved. |

| Competency CL (Clinical) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--------------------------|--|---|---|--|
| CL13 | Externally reports and investigates serious adverse reactions and events i.e. SABRE/SHOT as appropriate and promote shared learning using annual reports and recommendations of data gathered. | Demonstrates an understanding of SHOT and SABRE reporting schemes and their purpose in relation to safe transfusion practice. | Contribute to the reporting and investigation of SHOT and SABRE incidents and subsequent reports. Actively sharing information with colleagues involved in the transfusion process. | Takes the lead on the investigation of serious adverse blood transfusion reactions and events. Uses data, annual reports and recommendations to inform and develop practice. |
| CL14 | Develops networks with Transfusion Practitioners in other organisations to disseminate good practice by actively engaging in events and initiatives and by reaching out to colleagues within the profession. | Enthusiastically builds rapport and develops professional relationships with blood transfusion colleagues nationally. | Offers support to junior TP colleagues and the wider team to maintain effective professional relationships and collaborative working. | Leads on inter-organisational working. Assists in the facilitation of networking events and a source of expert advice and information nationally for transfusion practice. |

| Competency CO (Communication) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|-------------------------------------|---|--|--|--|
| CO1 | Able to communicate effectively and adapt the message to the audience to enable understanding and engagement. Follow logical sequences and be mindful of the knowledge, skills, culture, and beliefs of the audience. | Ability to use a range of communication skills tailored to the audience. | Demonstrates understanding of communication skills and has a good knowledge of influences on communication skills such as the culture and beliefs of the audience and adapts own skills to suit the situation. | Demonstrates in depth knowledge of how communication is used, has good understanding of the communication needs of others and has good self-awareness of own communication. |
| CO2 | Maintains the attention of an audience, ensure understanding of content to promote knowledge, accurately interpret questions and request clarification where necessary. | Able to interpret the communication needs of the audience and react appropriately to ensure the message is delivered and understood. | Actively engages the audience in the topic area and evaluates understanding based on communication cues. | Uses excellent communication skills and in-depth transfusion knowledge to engage the audience and bring about awareness to wider transfusion related issues. |
| CO3 | Gives effective formal presentations to effectively and efficiently disseminate information and ideas. Improve professional confidence by speaking and acting appropriately. | Takes an active role in formal presentations taking into account audience interactions. | Can present and effectively convey information to a range of different audiences and acts as a role model to others. | Instils confidence by acting as a professional role model providing expert advice and leadership on transfusion issues, communicating information and ideas appropriately and through effective formal presentation. |

| Competency PQI (Professional & Quality Issues) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--|---|---|--|---|
| PQI1 | Demonstrates autonomy and accountability in the transfusion practitioner role, recognising limits of self and others, especially when delegating tasks. | Demonstrates an understanding of limits of own practice and seeks to fill gaps in knowledge. Recognises limits to others knowledge base and appropriately delegates tasks. | Develops further knowledge to fill remaining gaps. Takes responsibility for identifying knowledge gaps in others and supports them in building their transfusion knowledge base as appropriate. | Works autonomously and provides leadership to more junior transfusion colleagues. Uses professional judgement skills to make sound decisions and takes accountability for decisions made. |
| PQI2 | Acts as a positive role model to others, upholding core values and acting out behaviours outlined by the Health Board, instilling and promoting trust and being open, honest and a proactive advocate for transfusion practice. | Demonstrates an understanding of the need to act as a role model for transfusion practice and demonstrates appropriate modelling behaviours in line with the values set out by local Health Board policy and professional codes of conduct. | Acts as a role model identifying risks to patients' safety and addresses issues as they arise including challenging inappropriate behaviours. Recognising the need to undertake difficult conversations and doing this tactfully which instils trust and confidence in others. | Supports colleagues in developing their leadership and role modelling skills. Attends local HTC to act as the transfusion advocate for clinical practice. |

| Competency PQI (Professional & Quality Issues) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--|---|--|---|--|
| PQI3 | Establishes a professional network within the Health board and across sites to ensure best practice is achieved and service improvements can be made. | Attends relevant meetings, understands the need to network in order to create links between the transfusion laboratory and clinical areas. | Takes an active role in relevant Health Board meetings / groups as necessary to represent transfusion including: <ul style="list-style-type: none"> • HTT • HTC | Liaises with relevant HB groups e.g. educational and training / quality and governance groups to represent transfusion. Represents HB on a national level as transfusion advocate. |
| PQI4 | Identifies and plans areas for own, organisational and others professional development linked to the TP role, transfusion practice and organisational strategy. | Attends and presents CPD sessions as appropriate. | Presents CPD sessions. Ensure links with appropriate departments to undertake training programmes. Assist in the development and review of educational courses. Identifies training needs and takes action to address them. | Develops CPD sessions as appropriate. Develops courses for professional development of others. Designs, develops and facilitates training programmes based on National Blood Transfusion Policy. |

| Competency PQI (Professional & Quality Issues) | Criteria | Competent TP | Experienced TP | Expert/ Specialist TP |
|--|---|---|--|---|
| PQI5 | Evaluates performance of self and others against agreed and accepted standards, competencies, guidelines and legislation. | Assesses staff against agreed performance standards (All Wales competencies and local policy documents). Evaluates own performance through PADRs. | Actively participates in peer review processes with TP colleagues. Acts on feedback to self and accepts the role of constructive criticism as a way of enhancing own performance. Participates in the development of national standards. | Takes the lead in writing national documents in line with current legislation related to blood transfusion. |
| PQI6 | Maintains own professional registrations and can provide evidence of training and development activities. | Ongoing learning/CPD/ revalidation applicable to role. | Ongoing learning /CPD/ revalidation applicable to role including undertaking mentorships and coaching training and teaching and assessing qualifications. | Ongoing learning /CPD/ revalidation applicable to role. Looks for opportunities to develop that may include leadership development courses and academic level 7 courses as appropriate. |

| Section SML (Strategy, Management & Leadership) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|---|---|--|---|---|
| SML1 | Contributes to long term planning and strategic service development related to Transfusion, to ensure plans and decisions are appropriate and achievable and of the highest quality. | Awareness and oversight of the planning process and contributes to transfusion service development. | Actively participates in the planning process and any transfusion service development initiatives. | Leading on service delivery and ensuring blood transfusion is considered in long term planning process/HB strategic plans. |
| SML2 | Promotes the role of transfusion and advocate for safe practice and decision making based on accurate, up-to-date evidence, using a variety of teaching, advertising and information sharing methodologies. | Demonstrates knowledge of available up to date transfusion evidence and promotion through training and information sharing delivery. | Actively participates in the decision making processes for transfusion and uses a wide range of methodologies to promote safe transfusion practice. | Acts as an advocate, contributing to national strategy ensuring an All Wales approach for safe transfusion practice and promotion of national objectives within the local HB. |
| SML3 | Delegates work and responsibilities as appropriate to ensure the smooth running of the service and maintenance of quality. | Demonstrates an understanding of the need to delegate tasks appropriately to ensure minimal risk to service and maintain resilience. | Actively delegates work to others to ensure service continuity and quality is maintained and takes accountability for own actions. | Challenges and escalates service delivery issues to ensure minimal risk to quality and safety of patients and working with others to problem solve. |
| SML4 | Takes an active part in service improvement initiatives and advises and supports on transfusion related issues. | Awareness of transfusion related issues and how they impact on service. | Contribute to service improvement initiatives and provides support and advice on transfusion related issues. | Leading service improvement initiatives and contributes to developing guidance on transfusion related issues. |

| Section SML (Strategy, Management & Leadership) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|--|---|---|---|---|
| SML5 | Monitors the use of blood components proactively across the health board, to promote appropriate use by highlighting and investigating anomalies and making associated recommendations to practice. | Demonstrates an understanding of appropriate use of blood components and local HB policies relating to appropriate use. | Actively participates in the monitoring of appropriate use of blood components, investigating and appropriately escalating anomalies. | Challenges practices and develops policies to ensure appropriate use of blood components at a local HB level, ensuring national recommendations are actioned at a local HB level. |

| Competency EPD (Education & Professional Development) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|---|---|--|--|---|
| EPD1 | Demonstrates a command of content knowledge and adjust teaching style and strategies by adapting lessons dependant on the audience; to ensure effective and engaging teaching. | Takes an active part in the teaching of transfusion related topics following lesson plans and is able to tailor training to the communication preferences of the audience. | Contributes to the development of robust transfusion related training programmes using sound transfusion knowledge base, including writing lesson plans. Able to answer topic related questions appropriately. | Leads on the development of robust transfusion related training programmes, has excellent knowledge base of topic area and is the advice giver for specialist transfusion related queries during training sessions. |
| EPD2 | Demonstrates flexibility and responsiveness to learners to support their learning process. Adapt teaching and learning strategies to the culture and preferences of learners to motivate and overcome challenges. | Demonstrates an awareness of motivational factors, challenges faced by learners and cultural preferences and how these impact upon learning. | Able to motivate learners by adapting own communication style and employ a range of different learning strategies to meet learners needs taking into consideration culture and preferences. | Experienced in responding and supporting learners. Provides supervision and advice to others regarding their teaching skills and their ability to respond to learners needs. |
| EPD4 | Creates and regularly reviews a national set of standard competencies for transfusion practice, based on guidelines and legislations. | Demonstrates an understanding of standardised All Wales Transfusion Competencies and how they work in practice. | Contributes to the review of the All Wales Transfusion Competencies. | Leads on the review of the All Wales Transfusion Competencies. |

| Competency EPD (Education & Professional Development) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|---|---|--|--|---|
| EDP5 | Supports staff development by providing; <ul style="list-style-type: none"> • Effective summative and formative feedback. • Bespoke remedial training. • Shared learning on local incidents. | Demonstrates awareness of local policy for supporting staff development, able to provide summative and formative feedback. | Contributes to the development of local plans to support staff development and makes suggestions for improvements, contributes to the development of strategies for communication and shared learning. | Develops local plans to support staff including communication and strategies for shared learning. Supervise others who provide support for staff development. |

| Section (Audit & Research) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|----------------------------|--|---|---|--|
| AR1 | Designs effective and informative clinical transfusion related audits, to improve and reduce patient risk and ensure appropriate use of blood components. | Takes an active part in collecting data, sharing information via various communication methods. | Designs audits, trending data and being part of the decision making process for recommendations for improvements. | Develops processes within local HB based on findings and recommendations and responsible for any identified actions. |
| AR2 | Takes an active part in health board, regional and national audits that aim to improve practice, service provision and patient safety, reporting in a timely manner and aiding in the decision making recommendations. | Takes an active part in conducting audits. | Designs local audits in conjunction with local HTT and communicates results appropriately ensuring recommendations are made and actions undertaken based on findings. | Designs national audits in conjunction with the AWTPG network and participates in national decision making for recommendations and improvements to practice. Contributes to being part of the team that develops national/UK strategies based on audit findings and recommendations. |
| AR3 | Analyses results from audits to ensure data is used to make recommendations and inform decisions. | Ability to read and interpret results from audits and understand why recommendations are made. | Takes an active part in the analysis of data and decision making based on the findings. | Puts results into action, developing plans and leads on improvements for practice, monitoring ongoing performance against agreed standard and actions. |

| Section (Audit & Research) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|----------------------------|--|--|---|---|
| AR4 | Presents audit findings in an engaging and effective manner to ensure the audience understands the message, concepts and implications of findings. | Able to communicate audit findings to a range of different audiences. | Uses a range of communication methods to present audit findings and gains feedback to ensure the messages are understood. | Develops communication tools to disseminate audit findings and acts upon feedback received, providing more specialist knowledge and advice as required. |
| AR5 | Supports and actively contribute to research identified to benefit transfusion practice. | Participates in research and works collaboratively with research colleagues. | Uses evidence based practice and research findings to underpin development of educational sessions to improve practice. | Actively seeks out and contributes to research activities and transfusion related service improvement initiatives. |

| Competency Emotional & Mental Effort (EME) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|--|---|--|---|--|
| EME 1 | Manages and prioritise conflicting workloads, ensuring duties are carried out in a timely manner and meeting realistic deadlines. | Sets realistic targets. Prioritises workload. Balancing demands of service – ongoing projects with incoming emails, phone calls etc. | Keeps abreast of National and local policy and evidence-base to ensure up to date practice whilst also ensuring that tasks are completed in a timely manner. | Delegating work appropriately to actively contribute to national and local policy development, balancing the demands of the service to motivate and maintain morale within team. |
| EME2 | Analyses complex data to create meaningful findings which aids in positive patients outcome and efficient decision making. | Can understand and interpret complex data sets. | Able to concentrate for varying periods of time, analysing data and making recommendations based on findings. | Develops and implements action plans for improvement based on findings from the data. |
| EME3 | Continually assesses unpredictable situations and utilises appropriate methodologies/strategies to ensure efficient decisions are made and patient care is uncompromised. | Able to dealing with challenging situations, seeking advice where required. Supports staff who have been involved in a transfusion-related incidents. | Able to dealing with challenging situations, assists with the management of changing situations. Supports staff and colleagues involved in and dealing with transfusion related incidents. Investigating potentially distressing incidents with sensitivity and confidentiality, setting and performing CAPA. | Manages difficult situations, supporting team members with personal and professional issues. Motivates and maintains morale within team. |

| Competency General (G) | Criteria | Competent TP | Experienced TP | Expert/Specialist TP |
|------------------------|--|--|---|---|
| G1 | Records information in an accurate and timely manner so that decisions can be made on high quality up-to-date information. Produces reports that are effective and appropriate for the intended audience. | Able to accurately record information in real time as per local policy and procedure and able to write basic reports. | Responsible for accurately recording information in accordance with the GDPR regulations and local policies and procedures. Able to produce high level reports tailored to a range of different audiences. | Takes responsibility for relevant record management and compliance with GDPR within the team. Able to produce high level reports for a range of audiences and to assist in the decision making processes. |
| G2 | Contributes to business planning activities that will improve the service by sharing experiences, ideas and opinions. Maintain an effective work-life balance so that the TP can perform to the best of their ability. Be realistic and assertive and refuse inappropriate requests, demands and activities. | Has an awareness of local business planning activities i.e. IMTP and can link to the TP role and Hospital Transfusion Team activities. Understands own mental health capabilities and how this can impact on the role. | Makes an active contribution to business planning activities and service improvement initiatives within the scope of the role. Understands own mental health capabilities and how this can impact on the TP role. | Takes the lead on improvement activity within their area of expertise, providing advice and supervision to the team to ensure demands and activities are realistic. Escalates concerns and ensures own and the teams mental health is considered. |

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