

Core Competences for the Physical Activity and Exercise Component

for Cardiovascular Disease Prevention and Rehabilitation Services



The **Seven Core Components**
for Cardiovascular Disease
Prevention and Rehabilitation



Contents

Introduction	1
A guide to using this document	3
The Competences	5
Competency 1: Core knowledge	5
Competency 2: Professional behaviour	8
Competency 3: Communication	12
Competency 4: Prepare, adapt and restore the environment and equipment	14
Competency 5: Preparing the individual for supervised exercise	16
Competency 6: Assessment	18
Competency 7: Physical activity planning and exercise prescription	21
Competency 8: Lead and/or deliver the supervised exercise session	23
Competency 9: Forward planning	26
Competency 10: Managing the unwell individual	28
Competency 11: Educational materials	30
Competency 12: Service planning and management	32
Competency 13: Service evaluation	35
Glossary	37
Acknowledgements	39
References	40

This document is the intellectual property of the British Association for Cardiovascular Prevention and Rehabilitation (BACPR).



Introduction

This competency document has been compiled to complement the following:

- i. The American Association of Cardiovascular and Pulmonary Rehabilitation (AACVPR) Position Statement 2010 Update: Core competencies for cardiac rehabilitation/secondary prevention professionals .
- ii. The British Association for Cardiac Prevention and Rehabilitation (BACPR) Standards and Core Components for Cardiovascular Disease Prevention and Rehabilitation 2012 .
- iii. The BACPR-Exercise Professional Group (BACPR-EPG) Position Statement (2012) Essential competences and minimum qualifications required to lead the exercise component in early cardiac rehabilitation.

The BACPR has launched the second edition of the BACPR Standards and Core Components for Cardiovascular Disease Prevention and Rehabilitation (March 2012). The seven core components include Physical Activity and Exercise as part of Lifestyle Risk Factor Management for which staff leading the exercise component of cardiac rehabilitation (CR) should be appropriately qualified, skilled and competent.

The BACPR-EPG has produced a Position Statement which outlines the essential competences and minimum qualifications required to lead the supervised exercise component in early cardiac rehabilitation. Having established the Position Statement, a working party representing the Exercise Professionals of the BACPR has now completed a supporting document which provides a framework that encompasses the knowledge, skills and competences of all professional groups involved in delivery of the exercise and physical activity component within CR. It is envisaged that this document will inform national practice and enable service providers and managers to ensure appropriate governance and safe and effective service delivery. In addition, it can be used as a useful tool to advise employers on standardised recruitment, giving a clear picture of the definition of a suitably qualified practitioner.

Competent health and exercise professionals are essential to the successful delivery of a CR service which meets the needs of the patient whilst promoting high quality CR services. This document provides guidance on the key competences required to ensure the use of best practice standards and guidelines for physical activity and exercise prescription. In total, 13 core competences are outlined, identifying specific knowledge and skills for each core competency and a framework to assess the health professional's ability to demonstrate their competency. This document also serves as a tool to monitor the need for continuing professional development for the exercise professional and supporting staff to achieve specific competences.

BACPR Education and Training

Dedicated to providing excellence in training and education in cardiovascular disease prevention and rehabilitation

BACPR Education coordinates the Specialist Level 4 Exercise Instructor qualification and a range of short courses for health and exercise professionals involved in cardiovascular prevention and rehabilitation. To support potential staff training and professional development needs, the competences are aligned to the BACPR's Education and Training courses. For further information visit the website: <http://www.bacpr.com/education>

The working party to develop these competences, representing the Exercise Professionals within CR included:

- Association of Chartered Physiotherapists in Cardiovascular Rehabilitation (ACPICR), who produced 'Core Competences for the exercise component of Phase III' in 2005, revised 2008.
- BACPR Exercise Instructor Network (EIN)
- British Association of Sport and Exercise Sciences (BASES)

All three representative organisations agreed to work together to produce one single document outlining the competences required for the physical activity and exercise component of the patient's journey through cardiac rehabilitation.

A guide to using this document

1. **As part of the development process for this competency framework various documents were utilised by the working group in the early scoping period.** Our thanks have been expressed to the organisations responsible for the development/publishing of these documents which included:
 - a) ACPICR Competences for the Exercise Component of the Phase III Cardiac Rehabilitation (2008)
 - b) BACPR EPG Position statement (2012)
 - c) BACPR Standards and Core Components for CR (2007, 2nd edition 2012)
 - d) British Association of Sport and Exercise Sciences Accreditation Competency Profile (2009)
 - e) Core competencies for cardiac rehabilitation/secondary prevention professionals: 2010 update: position statement of the American Association of Cardiovascular and Pulmonary Rehabilitation. J Cardiopulm Rehabil Prev. 31(1):2-10. Hamm LF, Sanderson BK, Ades PA et al. (2011)
 - f) Position Statement of the AACVPR Core Competencies for CR /secondary prevention professionals (2010)
 - g) Skills for Health National Occupational Standards
 - h) Skills Active National Occupational Standards (2010):
 - i) Level 4 Unit D518
 - ii) Level 3 Unit D463
 - iii) Level 3 Unit D464
 - iv) Other (no specified level): Full suite of Sports and Exercise Science
 - i) Wellbeing South East Exercise Referral Accreditation System “Recognising Excellence” (2010)
2. **Each competency is laid out in a table format so that the responses can be recorded easily** and can be completed either electronically or on a hard copy.
3. **Within each competency, there is a series of numbered performance criteria (pc) and columns against which to record:**
 - a) The **date** the pc is achieved.
 - b) Whether the pc is **essential, desirable or not applicable (E, D, N/A respectively)**.
 - c) Comments to identify perhaps, where further professional development is required to achieve the pc or to record specific exemplary areas of performance.
4. **At the end of each competency there is a summary table which records:**
 - a) A summary of performance observed: achieved/improvement required with comments/actions as appropriate.
 - b) Signatures of the reviewee and the reviewer to validate the recorded response and agreed outcomes.

5. **Evidence to determine success of a staff member to fulfil the criteria can be achieved through various methods, e.g.:**
 - a) Practical observation
 - b) Verbal communication
 - c) Questioning
 - d) In-service training
 - e) Mandatory training
 - f) External courses
 - g) Other resources, e.g. BACPR and ACPICR standards.

6. **It is not intended that observation and/or achievement of these competences should be a time consuming exercise.** It is therefore recommended that reviewers and reviewees consider this document as a useful tool to monitor performance and subsequent professional development required over a period of time (to be defined internally) rather than a lengthy process that is time consuming and impacts negatively on service delivery.

7. **As the document relates to the competences required for delivery of physical activity and exercise provision across the patient's journey through CR,** not all competences will be relevant to each member of staff. Hence, not all 13 competences and relating pc need to be achieved.

8. **It is the responsibility of the Manager/Reviewer** to determine if the competency or pc is essential, desirable and/or relevant to the member of staff.

9. **Each competency is also mapped against BACPR Education and Training courses** to identify appropriate training for the reviewee if applicable.

10. **The competences can be linked** with the NHS Agenda for Change Knowledge and Skills Framework (KSF) and therefore used as evidence for the KSF.

11. **The reviewer ideally should be competent in assessing an individual's ability** according to the competences outlined and have a sound understanding of the skills required to deliver safe and effective physical activity and exercise prescription in CR. It is recommended however, that a reviewer holds a relevant assessor qualification to enable objective assessment of the reviewee's knowledge and ability.

12. **After successful completion of the competences,** it is recommended that the competences will be reviewed as part of an annual appraisal to ensure competency is maintained, or in response to new published evidence and/or changes to national or local guidance.

Competency 1: Core knowledge

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
In relation to physical activity and exercise, the Cardiac Rehabilitation Professional has demonstrated knowledge and understanding of:				
1.1	Cardiovascular: <ul style="list-style-type: none"> Anatomy Physiology 			
1.2	Process of arteriosclerosis and pathogenesis of cardiovascular risk factors.			
1.3	Pathophysiology of cardiovascular conditions and related signs and symptoms.			
1.4	Cardiovascular assessments, diagnostic tests, interventions and medical and surgical management.			
1.5	Timescales for recovery after a new cardiac diagnosis or event.			
1.6	Cardiac arrhythmias (e.g. complex PVCs, atrial fibrillation, SVT) and their influence on physical activity and symptoms.			
1.7	Beneficial effects and potential risks of physical activity and exercise on CVD.			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 1: Core knowledge

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
1.8	Physiological responses (normal and abnormal) to acute exercise and adaptations to chronic exercise.			
1.9	Risk stratification according to assessment of the individual.			
1.10	Submaximal functional capacity testing.			
1.11	Exercise prescription methodology for cardiovascular endurance exercise and resistance training in patients with heart disease.			
1.12	Absolute and relative contraindications to exercise and indications to terminate an exercise session.			
1.13	Co-morbidities, limiting or otherwise that may influence an individual's ability to exercise or undertake physical activity.			
1.14	Current recommendations (FITT) for exercise and physical activity for individuals with CVD.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
1.15	Metabolic requirements for recreational, occupational, and sexual activities.			
1.16	Pharmacologic therapy for CVD and risk factor management.			
1.17	Effective behaviour change strategies based on common theoretical models and adult learning strategies.			
1.18	Relevant national standards, policies and guidelines.			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training; (ii) Physical Activity & Exercise in the Management of CVD Part 1: Principles & Practicalities & Part II: Advanced Application; (iii) Assessing Functional Capacity; (iv) Adapting Exercise; (v) Monitoring Exercise Intensity

Competency 2: Professional behaviour

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
<p>The Cardiac Rehabilitation Professional is able to demonstrate adherence to the highest standard of ethical and professional behaviour and has demonstrated the ability to:</p>				
<p>2.1</p>	<p>General</p> <p>Show evidence of:</p> <ul style="list-style-type: none"> • current professional body registration 			
	<ul style="list-style-type: none"> • appropriate liability and indemnity insurance 			
	<ul style="list-style-type: none"> • CRB clearance or equivalent 			
	<ul style="list-style-type: none"> • continuing professional development including revalidation 			
	<ul style="list-style-type: none"> • practice within legal and ethical boundaries 			
	<ul style="list-style-type: none"> • deliver services which comply with their professional code of conduct & relevant medico-legal requirements 			
	<ul style="list-style-type: none"> • work in accordance with evidence based practice and recognised best practice 			
<p>2.2</p>	<p>Equality and diversity</p> <ul style="list-style-type: none"> • Ensure practice in a non-discriminatory manner (in line with the Equality Act, 2010). • Be respectful of individuals and of their rights, recognising physical, psychological, environmental, cultural and socio-economic differences, adopting good practice in challenging discrimination and unfairness. 			

* Key: E = Essential D = Desirable N/A = Not applicable

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
2.3	<p>Confidentiality and record keeping</p> <ul style="list-style-type: none"> • Demonstrate compliance with the Data Protection Act, Information Governance and Caldicott principles. • Provide evidence of comprehensive and accurate record keeping in line with local protocols as appropriate. 			
2.4	<p>Informed consent</p> <ul style="list-style-type: none"> • Understand the importance of, and be able to obtain informed consent and be compliant with local and national policies. 			
2.5	<p>Duty of care</p> <ul style="list-style-type: none"> • Exercise the professional duty of care and to act in the best interests of the individual at all times. • Ensure the individual's privacy, dignity, wishes and beliefs are respected, whilst minimising any unnecessary discomfort. 			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 2: Professional behaviour

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
2.6	<p>Working relationships Conduct professional working relationships with individuals, significant others, colleagues and partners / stakeholders, to ensure:</p> <ul style="list-style-type: none"> ● honesty ● accuracy ● co-operation ● avoidance of misrepresentation ● avoidance of any conflict of interest ● integrity and high standards of professional conduct ensuring avoidance of any inappropriate behaviour ● work is within your own scope of practice and expertise, and if not, you seek advice or refer to another professional ● professional boundaries and standards of others are respected ● development of the knowledge and practice of others ● mentor support for colleagues is provided ● you act as a good role model 			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
2.7	<p>Health and safety Be aware of and compliant with, applicable health and safety legislation, including incident reporting and be able to act accordingly.</p>			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training: (ii) BACPR Standards and Core Component Study Day

Competency 3: Communication

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
3.1	<p>The Cardiac Rehabilitation Professional is able to communicate effectively with the individual, relatives, carers & professional others, and has demonstrated the ability to:</p> <p>Communicate effectively in consideration of individual differences: culture, age, ethnicity, gender, religious beliefs, socio-economic status, physical, emotional, psychological, educational and environmental factors.</p>			
3.2	<p>Use interpersonal skills and active listening techniques to encourage understanding, cooperation, informed decision-making and active engagement with individuals.</p>			
3.3	<p>Select, use and adapt communication methods in a format and at a level that is based upon the individual / group needs and abilities (e.g. verbal and non-verbal).</p>			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 3: Communication

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
3.4	Show sensitivity and empathy when responding in a non judgemental manner, to concerns and questions raised by individuals, giving clear, concise and accurate information (verbal and written).			
3.5	Establish and maintain effective communication with and between team members, health care professionals and partners / stakeholders, exploring differing perspectives to reach consensus on required future action.			
3.6	Provide timely and accurate reports and handovers (communicating current status, progress and physical activity / exercise outcomes) to ensure seamless transition between agencies / service providers.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: BACPR Level 4 Exercise Instructor Training

Competency 4: Prepare, adapt and restore the environment and equipment

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
4.1	Apply national health & safety guidelines and local operational policies when conducting environmental health and safety assessments.			
4.2	Identify potential risks and minimise any resulting hazards in the environment where the session will take place, e.g. inadequate heating, lighting, ventilation, humidity.			
4.3	Ensure that any necessary equipment, furniture or resources are prepared, available, in a fit state and ready for use, and if not, take any necessary remedial action.			
4.4	Follow the correct procedures and protocols to report and record problems with the environment, equipment and materials.			
4.5	Ensure availability of appropriate resuscitation equipment which is checked and ready for use.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency 4: Prepare, adapt and restore the environment and equipment

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
4.6	Adapt exercise equipment and the environment during exercise sessions as appropriate			
4.7	Move and handle equipment and resources in an appropriate, safe manner which is consistent with current legal and organisational requirements.			
4.8	Return equipment, furniture and resources to the correct location for storage or transportation after use and leave the environment in a condition suitable for future use.			
4.9	Ensure compliance to current organisational infection control requirements.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Signed Reviewer:	
Print Name: Print Name:	
Date:	

BACPR Education & Training Course References: BACPR Level 4 Exercise Instructor Training

Competency 5: Preparing the individual for supervised exercise

Competency 5: Preparing the individual for supervised exercise

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
5.1	Ensure the individual understands the purpose, structure, procedures and objectives of the session and how these link to their goals.			
5.2	Identify and respond to any information about the individual's response to the previous session or any change in physical condition, through pre-exercise screening and appropriate use of clinical measures.			
5.3	Negotiate, agree and record with the individual any changes to the planned activities.			
5.4	Ensure individuals have all necessary medication plus blood glucose management requirements as appropriate.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency 5: Preparing the individual for supervised exercise

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
5.5	Reinforce the rationale for a safe and effective exercise session and the way in which this can be achieved.			
5.6	Ensure individuals are appropriately dressed and equipped for exercise, e.g. footwear, loose comfortable clothing, heart rate monitor if required.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training; (ii) Physical Activity & Exercise in the Management of CVD Part I: Advanced Application.

Competency 6: Assessment

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has the ability to assess the individual's needs and abilities before planning exercise and physical activity, and can demonstrate the ability to:				
6.1	Obtain an approved referral document containing sufficient and meaningful information.			
6.2	Collate and interpret information prior to the assessment.			
6.3	Welcome the individual and explain the assessment process.			
6.4	Ascertain: <ul style="list-style-type: none"> ● relevant past medical history ● past and current cardiac status ● co-morbidities and functional impairment ● current symptoms 			
6.5	Identify inappropriate referrals including consideration of any absolute / relative contraindications to exercise (in line with BACPR guidelines) and deal with these according to local procedure.			
6.6	Identify current medications and the implications for physical activity / exercise.			
6.7	Ascertain previous and current levels of physical activity / exercise through discussion and using appropriate validated tools.			
6.8	Assess the individual's readiness to participate: adopt appropriate behavioural change strategies and motivational interviewing techniques to establish and agree physical activity / exercise short and long term goals.			

* Key: E = Essential D = Desirable N/A = Not applicable

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
6.9	Conduct and record appropriate serial measurements of: <ul style="list-style-type: none"> • blood pressure (automated and manual) • heart rate (palpation and heart rate monitoring devices) • RPE • Blood glucose • Pulse oximetry 			
6.10	Conduct and record an ECG in line with available equipment			
6.11	Undertake comprehensive risk stratification for exercise in line with recognised guidelines (e.g. BACPR and AACVPR guidelines).			
6.12	Select and conduct an appropriate sub-maximal functional capacity assessment, in line with protocols: <ul style="list-style-type: none"> • Chester step test • Incremental Shuttle Walk Test • Cycle ergometer test • 6 min walk test • Other: 			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 6: Assessment

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
6.13	Critically evaluate the information collected to determine: <ul style="list-style-type: none"> physical activity plan exercise prescription 			
6.14	Ensure the time taken to conduct the assessment reflects the process and information to be collected.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training; (ii) Assessing Functional Capacity; (iii) Monitoring Exercise Intensity

Competency 7: Physical activity planning and exercise prescription

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
7.1	Agree an individualised physical activity plan with SMART goals including activities of daily living and a home / unsupervised programme.			
7.2	Prescribe and adapt safe and effective exercise appropriate to the individual's needs in line with guidelines and the FITT principle for: <ul style="list-style-type: none"> <li data-bbox="408 224 451 2069">• warm up and cool down <li data-bbox="451 224 494 2069">• cardiovascular endurance exercise <li data-bbox="494 224 537 2069">• resistance exercise <li data-bbox="537 224 580 2069">• flexibility <li data-bbox="580 224 624 2069">• other e.g. balance, coordination 			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 7: Physical activity planning and exercise prescription

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
7.3	Use objective physiological measures to inform individualised exercise prescription, e.g. METs, HR, RPE.			
7.4	Encourage effective use of appropriate resources to help the individual achieve agreed goals and objectives, e.g. self help manuals, activity diaries etc.			
7.5	Educate and support individuals on safe and effective independent physical activity / exercise including appropriate warm up and cool down, signs and symptoms of over-exertion or under-achievement and activities to avoid.			
7.6	Review and adapt the physical activity plan and exercise prescription in response to the individual's motivation, needs and ability, and progress / regress the prescription accordingly.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	
Signed Reviewer: Print Name:	
Date:	

BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training; (ii) Assessing Functional Capacity; (iv) Adapting Exercise; (iii) Monitoring Exercise Intensity

Competency 8: Lead and/or deliver the supervised exercise session

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
8.1	Teach, review and adapt individual and group exercise in response to changing circumstances and individual's response to exercise.			
8.2	Establish and justify the staff / patient ratio based on supervision requirements and risk stratification.			
8.3	Utilise other members of staff appropriately during the exercise session to ensure safe and effective class management.			
8.4	Structure and lead exercise sessions in line with the FITT principle appropriate to individual needs and functional abilities.			
8.5	Provide individuals with warm up and cool-down exercises that are appropriate to their clinical status and ability.			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 8: Lead and/or deliver the supervised exercise session

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
8.6	Provide a conditioning component which is individualised according to the needs of the individual.			
8.7	Provide instruction, explanations and exercise demonstrations that are technically correct and appropriate to the individual's / group's needs.			
8.8	Monitor the individual's exercise performance by: <ul style="list-style-type: none"> ● Using subjective (e.g. RPE) and objective (e.g. HR, BP) methods to effectively monitor exercise intensity. ● Being aware of the individual's response to exercise and taking appropriate action as required. ● Determining how and when to effectively monitor individuals. ● Observing individuals throughout the exercise session and taking appropriate action as required. ● Adapting the monitoring method as determined by the individual's progress and their understanding of self-monitoring. 			
8.9	Effectively use verbal instruction, demonstration, audio and visual cues, and motivational techniques when delivering group exercise.			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 8: Lead and/or deliver the supervised exercise session

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
8.10	Observe and analyse individual's exercise performance and correct their technique at appropriate points providing positive reinforcement throughout.			
8.11	Teach and monitor the performance of all individuals within a group setting.			
8.12	Provide individuals with an appropriate period of post exercise supervision.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	
Signed Reviewer: Print Name: Date:	

BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training; (ii) Physical Activity & Exercise in the Management of CVD Part I: Advanced Application.

Competency 9: Forward planning

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional is able to plan for the individual's onward journey and has demonstrated the ability to:				
9.1	Conduct an appropriate assessment on completion of the physical activity / exercise programme which evaluates progress to date and establishes an exit strategy for the individual.			
9.2	Provide information on future options for continued physical activity including home based exercise and supervised / unsupervised exercise programmes.			
9.3	Reinforce the benefits of long term regular physical activity / exercise.			
9.4	Make timely onward referral to appropriately qualified professionals using recognised local or BACPR documentation.			

* Key: E = Essential D = Desirable N/A = Not applicable

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
The Cardiac Rehabilitation Professional is able to plan for the individual's onward journey and has demonstrated the ability to:				
9.5	Enable individuals to carry out self monitoring in order to ensure safe and effective physical activity / exercise.			
9.6	Transfer timely and accurate information to the primary care team and other healthcare professionals, as appropriate.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: BACPR Level 4 Exercise Instructor Training.

Competency 10: Managing the unwell individual

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
The Cardiac Rehabilitation Professional is able to plan for the individual's onward journey and has demonstrated the ability to:				
10.1	Act in a calm, sensitive, efficient manner when dealing with an unwell individual.			
10.2	Use the skills and support of colleagues when managing an unwell individual, be able to adapt your role within the team in response to a developing situation and ensure other group participants are managed appropriately.			
10.3	Assess for signs and symptoms which may indicate a change in cardiac status and take appropriate action.			
10.4	Recognise other signs and symptoms which may indicate a new condition or a change in an underlying condition and take appropriate action.			
10.5	Differentiate between cardiac and non-cardiac symptoms and take appropriate action.			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 10: Managing the unwell individual

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
10.6	Deal appropriately with individuals who present with medical complications that require intervention but do not necessarily require exclusion from exercise e.g. angina, hypotension, hypertension, poor diabetic control, slow or fast HR etc.			
10.7	Describe the local emergency protocols for summoning assistance when an individual becomes unwell.			
10.8	Rapidly assess an individual who has collapsed and provide appropriate treatment, as per Resuscitation Council Guidelines, if he/she is: (a) unconscious but breathing normally (b) unconscious and not breathing			
10.9	Give a concise and accurate handover to the relevant health professional and complete the appropriate documentation.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training; (ii) Physical Activity & Exercise in the Management of CVD Part II: Advanced Application

Competency 11: Educational materials

Competency 11: Educational materials

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
11.1	Understand the need to provide individuals with the information necessary to enable them to make informed decisions about physical activity and exercise.			
11.2	Provide relevant resources relating to physical activity and supervised / unsupervised exercise as appropriate.			
11.3	Know the local availability and cost of appropriate publications and self help manuals, and be able to facilitate the effective use of these resources.			
11.4	Plan, design and produce resources to meet a specific purpose, taking into account time, money and expertise available.			

* Key: E = Essential D = Desirable N/A = Not applicable

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
11.5	Ensure promotional materials are consistent with other related services.			
11.6	Evaluate existing and new material to determine the validity, accuracy, accessibility and appropriateness, and customise to meet local needs as required.			
11.7	Distribute resources effectively, utilising appropriate routes including dissemination to targeted groups.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	Signed Reviewer: Print Name: Date:

BACPR Education & Training Course References: BACPR Standards and Core Components Study Day

Competency 12: Service planning and management

Competency 12: Service planning and management

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
12.1	Agree and establish clear service aims and objectives with measurable outcomes for physical activity / exercise.			
12.2	Plan, develop and implement operational procedures and protocols for service delivery including inclusion and exclusion criteria, in line with local and national guidelines, current evidence and organisational objectives.			
12.3	Develop, adapt and regularly review protocols and procedures as required.			
12.4	Develop, implement and ensure systems are in place to allow effective service evaluation and development.			
12.5	Be accountable for record keeping and management in line with clinical and information governance.			
12.6	Engage in effective partnership working to promote quality, continuity of care and a cost effective service.			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 12: Service planning and management

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
12.7	Ensure that the service promotes equality and diversity in accordance with legislation, policies, procedures and relevant standards.			
12.8	Be accountable for implementation of health & safety legislation and any security policies and procedures.			
12.9	Provide evidence of effective consultation with service users when planning and developing the service.			
12.10	Provide evidence of the team's personal and public liability and indemnity insurance as appropriate.			
12.11	Ensure that all professionals delivering the exercise component hold the appropriate qualifications, knowledge and skills as defined in the BACPR EPG Position Statement.			
12.12	Contribute to the development of others by facilitating a wide range of CPD opportunities as appropriate to fulfil service needs and objectives.			
12.13	Manage individual performance through a range of recognised methods in accordance with local policy (e.g. appraisal, peer review, mentoring).			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency 13: Service evaluation

No.	Performance criteria	Date achieved	E, D, N/A*	Comments
12.14	Provide effective workforce planning including recruitment and selection.			
12.15	Identify, organise and provide suitable location(s) for the service.			
12.16	Provide effective operational management of the team prioritising workload, ensuring adequate staffing levels and skill mix to cover service provision.			
12.17	Provide effective management of resources (including finances and educational materials).			
12.18	Provide up to date comprehensive information to enable the team to appropriately refer on / sign-post to tailored physical activity / exercise opportunities.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
Yes - competency achieved <input type="checkbox"/>	Comments: Date:
Signed Reviewee: Print Name:	
Signed Reviewer: Print Name: Date:	

BACPR Education & Training Course References: BACPR Standards and Core Components Study Day

Competency 13: Service evaluation

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
The Cardiac Rehabilitation Professional has demonstrated the ability to:				
13.1	Identify, develop and implement appropriate monitoring systems to enable comprehensive service evaluation of the physical activity / exercise component.			
13.2	Identify, develop and use appropriate valid, reliable and cost effective quantitative and qualitative assessment tools and techniques to measure the quality and value of the physical activity / exercise interventions.			
13.3	Collect & record individual patient outcome measures (including short and long term physical activity behaviours and functional capacity) on a cardiac rehabilitation database (e.g. NACR) to enable local and national analysis.			
13.4	Accurately collect and record key service data, including referral information, uptake, attendance and adherence records.			
13.5	Ensure that the service users have contributed to the evaluation process.			

* Key: E = Essential D = Desirable N/A = Not applicable

Competency 13: Service evaluation

No.	Performance criteria	Date achieved	E,D,N/A*	Comments
13.6	Analyse local service data using reliable methods to compare with recognised standards / guidelines and highlight the differences.			
13.7	Draw valid conclusions, make recommendations based on the evidence and implement service improvement as appropriate.			
13.8	Present relevant information in appropriate formats (e.g. reports) including current service delivery for Managers / Commissioners / Stakeholders to influence future service delivery.			

* Key: **E** = Essential **D** = Desirable **N/A** = Not applicable

Competency achieved:	
Improvement required <input type="checkbox"/>	Agreed Action <input type="checkbox"/> (outline as appropriate) Date:
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BACPR Education & Training Course References: (i) BACPR Level 4 Exercise Instructor Training; (ii) BACPR Standards and Core Components Study Day

Glossary

AACVPR	American Association of Cardiovascular and Pulmonary Rehabilitation
ACPICR	Association of Chartered Physiotherapists in Cardiac Rehabilitation
BACPR	British Association for Cardiovascular Prevention and Rehabilitation
BACPR-EIN	British Association for Cardiovascular Prevention and Rehabilitation Exercise Instructor Network
BASES	British Association of Sport and Exercise Sciences
CPD	Continuing Professional Development
CRB	Criminal Records Bureau
CVD	Cardiovascular Disease
ECG	Electrocardiogram
EPG	Exercise Professionals Group – collaboration between the British Association of Sport and Exercise Sciences (BASES), the Association of Chartered Physiotherapists in Cardiac Rehabilitation (ACPICR) and the British Association for Cardiovascular Prevention and Rehabilitation (BACPR) Exercise Instructor Network.
FITT	Frequency, Intensity, Time and Type of Exercise
HR	Heart Rate
METS	Metabolic Equivalent (Task) is a physiological measure expressing the energy cost during a specific physical activity to a reference metabolic rate of 3.5 ml O ₂ ·kg ⁻¹ ·min ⁻¹ . One metabolic equivalent (MET) is defined as the amount of oxygen consumed while sitting at rest.
NACR	National Audit of Cardiac Rehabilitation – a national dataset and management system
PVC	Premature Ventricular Contractions
RPE	Rating of Perceived Exertion
SMART	Specific, Measurable, Agreed, Realistic, Time bound
SVT	Supraventricular Tachycardia
Caldicott Principles	These were developed as a result of recommendations in Dame Fiona Caldicott's 1997 report on how patient information was used in the health service. They are a set of six general principles that health and social care organisations should use when reviewing the use of client information.
Cardiac Rehabilitation Professional	Those people who deliver any stage of cardiac rehabilitation who, as part of the service and in the context of these competences, are giving advice and information on physical activity and/or exercise.
Data Protection Act	The Data Protection Act 1998 is the main piece of legislation that governs the protection of personal data in the UK. The Act defines eight data protection principles. See http://www.ico.gov.uk/for_organisations/data_protection.aspx for further information.
Equality Act 2010	An Act of Parliament that covers nine protected characteristics, which cannot be used as a reason to treat people unfairly. The Equality Act sets out the different ways in which it is unlawful to treat someone, for example direct and indirect discrimination, harassment, victimisation or failing to make a reasonable adjustment for a disabled person.
Exercise	Exercise is a subset of physical activity that is planned, structured, and repetitive and has as a final or an intermediate objective the improvement or maintenance of physical fitness. (Caspersen et al 1985)

Exercise Prescription	Refers to the design of a plan of fitness-related activities (using FITT principles) specifically for an individual and developed by an exercise professional for a specified purpose.
Exercise Professional	An individual, who holds a recognised exercise qualification approved by the Register of Exercise Professionals (REPs), Chartered Society of Physiotherapists (CSP) or the British Association of Sport and Exercise Sciences (BASES), adheres to relevant industry standards and a code of ethics and has the knowledge, skills and competence to perform specific roles in relation to exercise in cardiac rehabilitation.
Health Care Professional	An individual, who for the purposes of these competences, provides health services to individuals as part of a cardiovascular prevention and rehabilitation programme.
Individual	Those participating in the Cardiac Rehabilitation programme during any stage/ phase and covering a broad range of terms including clients, patients, relatives, carers, significant others and service users.
Individualised	The 'tailoring' of exercise to suit the individual based on clinical and functional needs.
Information Governance	Information Governance ensures necessary safeguards for, and appropriate use of, patient and personal information.
Long Term	Long term physical activity/exercise management
Outcome Measures	Tools that enable the exercise professional to undertake an evaluation of the physical activity and/or exercise component of the cardiac rehabilitation service.
Physical Activity	<p>Physical activity is defined as any bodily movement produced by skeletal muscles that results in energy expenditure above resting level (Caspersen et al., 1985). This broad definition involves virtually all types of activity like: walking, cycling, dance, traditional games, pastimes, gardening, housework, sports and intentional exercise (Cavill et al., 2006).</p> <p>UK guidelines (2011): Physical activity includes all forms of activity, such as everyday walking or cycling to get from A to B, active play, work-related activity, active recreation (such as working out in a gym), dancing, gardening or playing active games, as well as organised and competitive sport.</p>
Physical Activity Plan	A proposed course of action to support an individual to become more active through both structured and independent physical activity.
Scope of Practice	Taking into account legal and ethical responsibilities, work within the boundaries set by an individual's qualifications, knowledge, skills and experience in order to practice safely and effectively.
Sedentary	UK Guidelines (2011): Sedentary behaviour is not simply a lack of physical activity but is a cluster of individual behaviours where sitting or lying is the dominant mode of posture, and energy expenditure is very low.
Short Term	Stages 0-6
Supervised	Observe and direct the execution of an exercise session
Unsupervised	Not supervised or under constant observation

Acknowledgements

Consultation Groups

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- Association of Chartered Physiotherapists in Cardiovascular Rehabilitation
- British Association for Cardiovascular Prevention and Rehabilitation Exercise Instructor Network
- British Association of Sport and Exercise Sciences
- The British Association for Cardiovascular Prevention and Rehabilitation Council Members

The BACPR EPG Working Group

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- Annie Holden (Competency Working Group Co-ordinator)

References

Hamm et al (2010). Core Competencies for Cardiac Rehabilitation/Secondary Prevention Professionals: 2010 Update. Position Statement of the American Association of Cardiovascular and Pulmonary Rehabilitation.

The BACPR Standards and Core Components for Cardiovascular Disease Prevention and Rehabilitation 2012 (2nd Edition)

BACR Exercise Professionals Group (EPG) Position Statement 2012: Essential competences and minimum qualifications required to lead the exercise component in early cardiac rehabilitation.

For more information please visit the BACPR website
www.bacpr.com



“Promoting excellence in cardiovascular disease prevention and rehabilitation”

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