



NHS CUMBRIA

# MANAGEMENT DEVELOPMENT PROGRAMME

## SUMMARY

In 2010 **NHS Cumbria** looked at its internal talent management strategy and identified that there was a need to support Band 7 staff, to help them to progress into senior manager roles. As a result a Management Development Programme was developed in order to support talented staff, and six employees from both clinical and managerial backgrounds were recruited as cohorts.

Participants undertook three separate six-month placements, rotating through a wide variety of roles in order to gain as much experience as possible. This enabled individuals to undergo significant personal development, which has improved their skills base, enabled them to deliver a higher quality service, and improved their career prospects. The projects they ran as part of each placement have also contributed to improved service delivery, and have helped the PCT remain resilient whilst splitting provider and commissioner services, as part of Transforming Community Services (TCS) in 2011.

## KEY OUTCOMES

This programme has not been formally evaluated, and was not established so that development could be measured against set metrics. However, anecdotal evidence, gathered from participants as part of this case study, indicates that it has been successful both at an individual level and also for the organisation as a whole.

- **Skilled-up Workforce** - Participants have gained invaluable skills, which they would not have done as part of their regular day job. For example, a clinician who was highly skilled in clinical duties, had very limited access to a computer and thus was not as skilled in this area. However, this programme ensured that she gained basic skills, such as how to use an Outlook Calendar, which is invaluable in helping her to coordinate her own time and to set up meetings.
- **Staff Turnover** - Two participants said that they had wanted to leave the organisation, and possibly the NHS as a whole, prior to being accepted on this course, as they felt stifled and unable to personally develop. They could also see areas of work where they could improve quality, but they felt that management was so chaotic that they were unable to take forward their ideas. However they would no longer consider leaving as they feel that they have a chance at career progression, personal development and an opportunity to influence service delivery.
- **Career Progression** - 5 of the cohort have moved job roles since they undertook the programme, which they feel has been a beneficial step in their development. Due to current uncertainty within the Trust and a freeze on recruitment it has not been possible for most people to actually gain a promotion, with most of these moves being a lateral step, however these changes in roles and responsibilities are seen as a stepping stone within the current climate.

*"I can safely say that I wouldn't have got this job without the skills I developed"* Lisa Gibbons (participant)





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- **Personal Development** – Each individual undertook an Insight Character Profile, both before and after the course, and this highlighted some interesting changes. For instance,;

*“For me I think the biggest change is that in my first profile at the start of the programme, when I managed small team with a very narrow focus, it was identified that I was reluctant to risk new ideas and found it difficult to respond to changes in direction. Following the programme I gained a job at a much broader strategic level and my second profile identified strengths as an ability to see options and alternatives and actively seek the contributions/ knowledge of others and the alternative view”.* Lisa Gibbons (participant)

Everyone felt that they had enjoyed huge personal achievements, having set and achieved their own goals, which they were able to change over time according to their circumstances.

*“I have learnt a lot about myself, and the Insight Character Profile helped me to understand my strengths and weaknesses better. When this programme started people expected to be placed in stable teams but this changed, so outcomes and way of working had to change. The political environment of the Trust has also been difficult at times but worth it, as these changes have taught us all resilience and fortitude, making us more hard skinned, and was a great opportunity for personal growth”.* Michelle Church (participant)

- **Opportunities** - Participants are able to access opportunities that they would never have had in other organisations.

*“The course was provided at the right time, at the right level, and in the right format, and has helped us move through the glass ceiling”.* Michelle Church (participant)

## BACKGROUND

When this programme began NHS Cumbria was a Pathfinder organisation with nearly 3000 staff, which had been tasked with finding a new way of delivery services following the Government’s ‘White Paper- Equity and Excellence: Liberating the NHS’. As such it was operating around a model that was based on working with GPs in Integrated Care. The PCT looked at locality models and how locality management could be made sustainable, initially across six localities. This meant that staff needed to be moved to different areas and take on different roles. This was a difficult time for the organisation in terms of staff morale as there was a lot of uncertainty about the future. However this programme was one of the ways in which the Trust was able to build staff engagement, whilst skilling up its workforce, to make it more resilient in the face of transformational change.

Part way through this programme, when the group was undertaking its third and final six month placement, the government issued guidance that commissioners and providers would have to split by 1 April

2011, as part of its Transforming Community Services (TCS) Agenda. This was a much different route to that already undertaken by NHS Cumbria, so a lot of work had to be done in order for services to split by this deadline. Following the split, 2500 provider services staff transferred out of the PCT into Cumbria Partnership Trust, leaving behind approximately 290 full time equivalent commissioning staff.

Most of the Management Programme cohort were also transferred out of the Trust at this time. However this was not allowed to affect delivery of the programme. All the development activities continued even though the participants were now working in two different organisations. With support of both the Trusts the participants were still given protected time for development and to attend action learning sets. The new skills which were being developed were tested as some of the participants were given temporary leadership roles. At this point the action learning sets became more important as a support mechanism.

- **Service Delivery** - The projects that were delivered as part of this programme have made a positive difference. For example asking a non clinician to review the functions of a health visiting team meant that a completely different view was obtained on the changes needed. Some projects helped the PCT through transitional changes, by supporting delivery against tight deadlines, thus ensuring that the Trust remained resilient.



## HIGH IMPACT OBJECTIVES

- Support individuals with personal development
- Develop management and leadership skills within NHS Cumbria to deliver a cohort of people with a greater skills base.
- Encourage participants to gain a wider knowledge of the Trust, its politics and its strategic objectives.
- Enable talented Band 7 staff to apply for more senior posts, or to return to their substantive roles with more knowledge, to the benefit their teams.
- Improve service delivery via placement specific projects
- Link to the Trust’s Talent Management Strategy.
- Strengthen the OD and Change management capacity within the Trust



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## KEY STAGES OF SET-UP

### Talent Management Review

Following the publication of High Quality Care for All by the Department of Health, the 2008/9 operating framework called on all Strategic Health Authorities to publish Talent Management Strategies and Plans by July 2009. Following on from this there was an expectation that PCTs would develop individual Talent Management Plans.

Within Cumbria recruitment to management posts is often difficult due to the geography and rurality of the area. This made it more important for the PCT to look at creative ways of nurturing and developing potential leaders within the organisation.

Feedback from management courses being delivered within the Trust suggested that the transition between Band 7 and Band 8 was particularly difficult for staff as they went from feeling very competent in a service delivery role into team leader/manager role for which they had little preparation. The idea of a management development programme designed to equip staff with management skills and a broader overview of the organisation was developed to address this issue.

### Programme Manager Appointed

Noleen Devlin, who suggested developing this programme in the first instance, was appointed as programme manager. Noleen was a strategic Organisational Development worker, with a background as a district nurse. The idea came initially from feedback from clinicians that they were often placed in management roles without being given support to develop the skills needed. It was also apparent that clinicians did not understand the commissioning role and commissioners often did not grasp the complexity of operationalising service changes. The scheme was devised to address these issues. Noleen managed the scheme but did not do placements herself, instead focusing on coordinating the placements, running development days, and setting up mentoring relationships.

### Cohort Established

All Band 7s within the organisation were invited to apply for a place through the Trusts internal communications system, the application form asked for a brief CV and for applicants to give reasons for wanting to be part of the programme. A steering group comprising the project lead and three senior managers was set up initially to recruit to the programme and then to oversee it as it progressed. Shortlisted applicants were then interviewed by the project lead and the deputy director of organisational development and six people were appointed to the programme, before being allocated suitable placements.

### Placements

The first round of placements commenced from September 2009 until February 2010, with the second set running from March until Sept 2010, and the final set from October 2010 until March 2011.





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The following posts were filled by scheme members:

PLACEMENT	JOB ROLE/RESPONSIBILITIES
Public Engagement Unit	This was a direct replacement post with direct responsibility for leading the complaints team. Participants became part of the wider communications and public engagement team, with an opportunity to take on projects and to support performance monitoring and also public engagement
Children's services	<p><b>SUPPORT ROLE FOR CHILDREN'S SERVICE MANAGER</b></p> <p>This role was created within the Children's Services, with funding from the health visiting post. The post released management capacity in Children's services through allowing specific projects to be picked up by the participant of the scheme. It has also allowed for the clinical service manager to look creatively at options for skill mix within Health Visiting in West Cumbria.</p> <p>Participants worked in a support role to a clinical services manager an exciting time for the future of this service.</p>
Discharge Liaison - Provider services	<p><b>DISCHARGE LIAISON</b></p> <p>This was a direct replacement post and due to the specialist nature of the post it was filled initially by a District Nurse who had the relevant experience and training. However two more clinical qualified staff on the scheme also accessed the requisite training to rotate into this post.</p> <p>Participants had an opportunity to work with the discharge liaison team and be involved with service development in the Copeland Unit.</p>
Locality Commissioning	<p><b>COMMISSIONING SUPPORT</b></p> <p>A role was been created in commissioning, working between the development of the cancer services pathway and the development of integrated care services in Furness locality. This was a challenging role but one that has allowed the participant to gain a wide breadth of knowledge of the services provided by the Market Development Directorate and a good understanding of commissioning.</p> <p>Participants provided support for future services in localities across Cumbria and looked at Continuing Care, exploring the context of services for the next five years, what service users wanted, and future competencies required by the workforce.</p> <p>Specifically there was work carried out on a Lung Cancer Review in order to make recommendations for change (see appendix 5).</p>
Organisational Development (OD)	<p><b>SERVICE REDESIGN FACILITATORS (TWO POSTS)</b></p> <p>Based in the OD department these posts were identified and cleared through the vacancy control procedure but not appointed too.</p> <p>Working with the OD team the participants could develop skills around facilitation, service redesign and change management. They also had a chance to be involved in locality development in Eden and Furness.</p>

For a more in-depth understanding of how placements worked and how they supported participant's development see Appendix 1 – Overview of Participant Placements



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## HOW IT WORKS

### Placements

Before participants could be accepted onto the course their line managers needed to release them from their current role for 18 months, and agree that other participants could be brought into their teams in their place.

Objectives were then set between participants and their new line managers at the beginning of each placement, to determine what projects/work they should undertake, to aid their development and support service delivery.

### Personal Development Days

Throughout the duration of placements, formal development days were run every other month, which were full day sessions focused on CPD that covered issues such as; communication skills, self awareness, managing people and developing staff.

### Peer Support

Action Learning Sets were run on alternate months to development days, to allow the cohort to get together and share their experiences/learn from one another. This allowed people to support those were currently doing a placement within their old team.

### Mentorship

Everyone was paired with a mentor, who they met on an ad-hoc basis for support and advice. Mentors were senior managers, who stayed the same throughout the eighteen month programme.

## RESOURCES

This programme has been delivered with minimum financial input from the Trust, as staff undertook placements whilst formally remaining under their fixed term posts. Meetings are also held in-house to avoid room costs.

For the most part people filled each other's roles, with no additional cover required. However, where clinicians were swapping

roles with non-clinical managers it was impossible for this to happen. Therefore, to support service provision, money was released from the Organisation Development (OD) budget, where there were two vacant posts.

The only extra funding required was when an external consultant was brought in for development days. Again this was funded through the OD Budget.

## KEY CHALLENGES

- Travel** – Due to the size and scale of NHS Cumbria, services are spread across a large region. Many participants are therefore based quite far apart. This made it difficult for some people to travel to their new roles, and some even had to adapt to county-wide working, where they were used to locality-based roles. This meant that they had to put in long days and adapt to new pressures. One person, who had never driven outside of Cumbria, even had to learn how to drive on motorways in order to travel to Manchester. This pushed her to act outside of her normal comfort zone, which in the end had a very positive effect on her confidence.
- Line Managers** – line managers saw this as an excellent development opportunity for their staff, but some did not think about the amount of support that would be needed for others coming into their teams. These managers had overly high expectations of what participants would be capable of, and did not understand that straight role swaps were not always possible. This was addressed in some cases by releasing funding from the OD budget so that a support role could be brought in to cover absence of the substantive post. The funding for two OD posts was used to employ backfill in provider services to cover two clinical members of staff participating in the scheme. This has allowed provider managers to use this funding to look at service redesign and skill mix rather than replacing like for like and has also ensured that clinic skill in teams and front line services were not
- compromised. However, in most cases managers this was not required, and managers just learnt how to adjust their teams.
- Steep Learning Curves** – with so many new skills to learn some participants felt a bit overwhelmed and out of their depth. This was exacerbated by a lack of understanding and support from their new line managers in the short term. However over time support mechanisms were put in place and participants adapted to the steep learning curves they had to undertake.
- Unprecedented Change** – Whilst this programme was running, the organisation was changing on a weekly basis, with new guidance being issued all the time. Therefore it was difficult for participants to learn in such an unsettled environment, and also to manage and support their teams. People would be tasked with completing a piece of work and then pulled somewhere else. This challenge proved beneficial in the long-run as it built up general resilience and taught people to be much more flexible *“we were rubber at the end of it”* Lorraine Dixon
- Different ways of Working** – Moving into and managing new teams can be difficult as often operate in a way that is unfamiliar. This was even more of an issue for those people who transferred over to Cumbria Partnership Trust, as they did not know how the organisation itself, or their new teams. Participants who did a placement within OD first found this a little easier, as they gained an insight into how the whole organisation worked before they joined specific teams.





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## KEY LEARNING

- A longer lead-in time would be beneficial to allow for planning and administration. Some participants had no computers or phones for the first 4-6 weeks, due to lack of planning, and this was quite detrimental as it accounted for a large chunk of time out of a 3 month placement. Administrative support would be also have been be beneficial at the outset.
- To help people understand the organisation as a whole and also what challenges they may face, an initial induction to the programme would be useful.
- Managers should also be briefed about those people who will be joining their teams, so that they may understand what support they will need. Managers should also be encouraged to provide mini team inductions for each participant.
- Everyone faced different challenges but no one dropped out because the support network worked so well. This programme would not have led to development if there had not been real challenges and a few tears, but peer support and sanity checks helped people achieve their goals.
- Extending the programme over 2 years, as opposed to 18 months, would allow people a little longer in each role, which would let them become more proficient before they move on. However, it may be more difficult for departments to release staff for longer periods of time and some service managers have expressed that their teams were glad to have team stability returned after a period of rotations, and that 18 months was a manageable period.

- Some line managers used people's existing skill sets rather than providing new skills, but this was necessary to support the organisation through a period of crisis, with an 'all hands to the pump' type strategy. This flexible approach was beneficial to the organisation as a whole but still allowed people to learn how to cope under pressure.
- People learnt a lot about themselves, and also gained an understanding of how their actions had an effect upon their own work environments. This puts them in a better position to act as senior managers, as they can now bring out the best in themselves and also those around them.
- Gaining an insight into the politics of the organisation at a senior level was invaluable, as was having a voice at this level which allowed participants to raise issues that they, and their patients, find important.
- The programme was solely vocational, and used action learning. It was not academic, which prevented unnecessary burden.

## SUSTAINABILITY

The group continues to meet on a quarterly basis, to sustain their learning, to understand changes happening within the organisation and to offer peer support. This will continue to happen going forward.

## NEXT STEPS

No further programmes are planned at present, due to the large scale changes happening within the Trust. However there has been high demand from other interested staff, so another programme may be run in future, in partnership with Cumbria Partnership Trust.

## SUPPORTING MATERIAL

- **Appendix 1** – Overview of Participant Placements
- **Appendix 2** – Development & Action Days– Annual Programme
- **Appendix 3** – Management Development Programme Interim Report
- **Appendix 4** – Presentation re Management Development Programme
- **Appendix 5** – Lung Cancer Pathway Review –Interim report (project outcome)
- **Appendix 6** – Lisa Gibbon's Personal Objectives



## CONTACT FOR FURTHER INFORMATION

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