

Board Meeting in Public Tuesday, 28 March 2023

Title of Report	Leadership and Management Development Spotlight– Status Update	Agenda No.	3.6b.
Nature of Report	<input checked="" type="checkbox"/> Official	<input type="checkbox"/> Official Sensitive	
Author(s)	Anna Butterfield; Assistant Director of Leadership, Performance and Culture Lisa Johnson; Head of Learning Services		
Lead Executive	Deb McKenzie; Chief People Officer, Programme SRO		
Non-Executive Director Sponsor			
Presented for (tick all that applies)	<input type="checkbox"/> Approval <input type="checkbox"/> Assurance	<input type="checkbox"/> Information <input checked="" type="checkbox"/> Update	
Purpose of the report and key issues			
The purpose of the paper is to provide the Board with a progress update of the Leadership and Management programme, the approach being taken, an update of progress and key learnings to date, and next steps.			
Previously Considered by			
Executive Team: 21 st September 2022 a discussion outlined our plan to address the requirements for the building of management capability across the organisation supporting our ambition of becoming a high performing inclusive organisation. This approach and plan were discussed and approved.			
Recommendation	The Board is asked to note the approach being taken and progress to date.		
Risk(s) identified (Link to Board Assurance Framework Risks)			
Strategic Risks: BAF-08 Our leaders and managers lack the skills and capabilities required in today's NHS to create a high-performing, fully inclusive environment).			
Strategic Objective(s) this paper relates to:			
<input type="checkbox"/> Collaborate with partners <input checked="" type="checkbox"/> Invest in people and culture <input type="checkbox"/> Drive innovation <input type="checkbox"/> Modernise our operations <input type="checkbox"/> Grow and diversify our donor base			
Appendices:	<ol style="list-style-type: none"> 1. Results for Oct-Dec 2022 2. Skills Matrix – DRAFT example 3. Management 101 4. Middle Management Pathway (Existing managers) 5. Art of Management Content 		

Context

Following a detailed phase of discovery, in September 22 the Executive Team approved a proposal from the Leadership Performance and Culture team (LPC) to develop the capabilities of the organisation's leaders both for the present and future needs seeking to:

- Provide managers with the right interventions to develop the skills they need to 'Lead People' well
- Provide a development framework that sets out a clear pathway for all managers and leaders from aspiring through to Director level (focussing initially on middle managers)
- Provide leaders and managers with the support they need to develop their capabilities and be clear on the expectations of their roles.
- Provide leaders of the future with a development proposition that is wider and more responsive to fit the challenges of their busy and complex roles.
- Deliver flexible and adaptable learning experiences that can accommodate the demands of the everyday role and career aspirations. In adopting a primarily self-directed approach this puts the learner in control of their own development

The approval came during a particularly turbulent time for NHSBT. As a result, the programme has incorporated the recommendations from the CQC Well Led inspection as an integral part of its design. Moreover, the original agreed timeframes were adjusted to facilitate earlier mobilisation of the development, in order to support the Response work. Over the past 6 months, the programme has successfully developed multiple cohorts of middle managers in the skills needed to effectively lead their teams and realise our ambition to become a high-performing, intentionally inclusive, anti-racist organisation. Moving forward it is our intention to provide all new managers (promoted or joining) with access to new manager training where needed and Management Essentials within their first two months. In addition, the offer to our current middle managers will extend to include the Art of Management Programme.

Background and the Leadership and Management Eco System

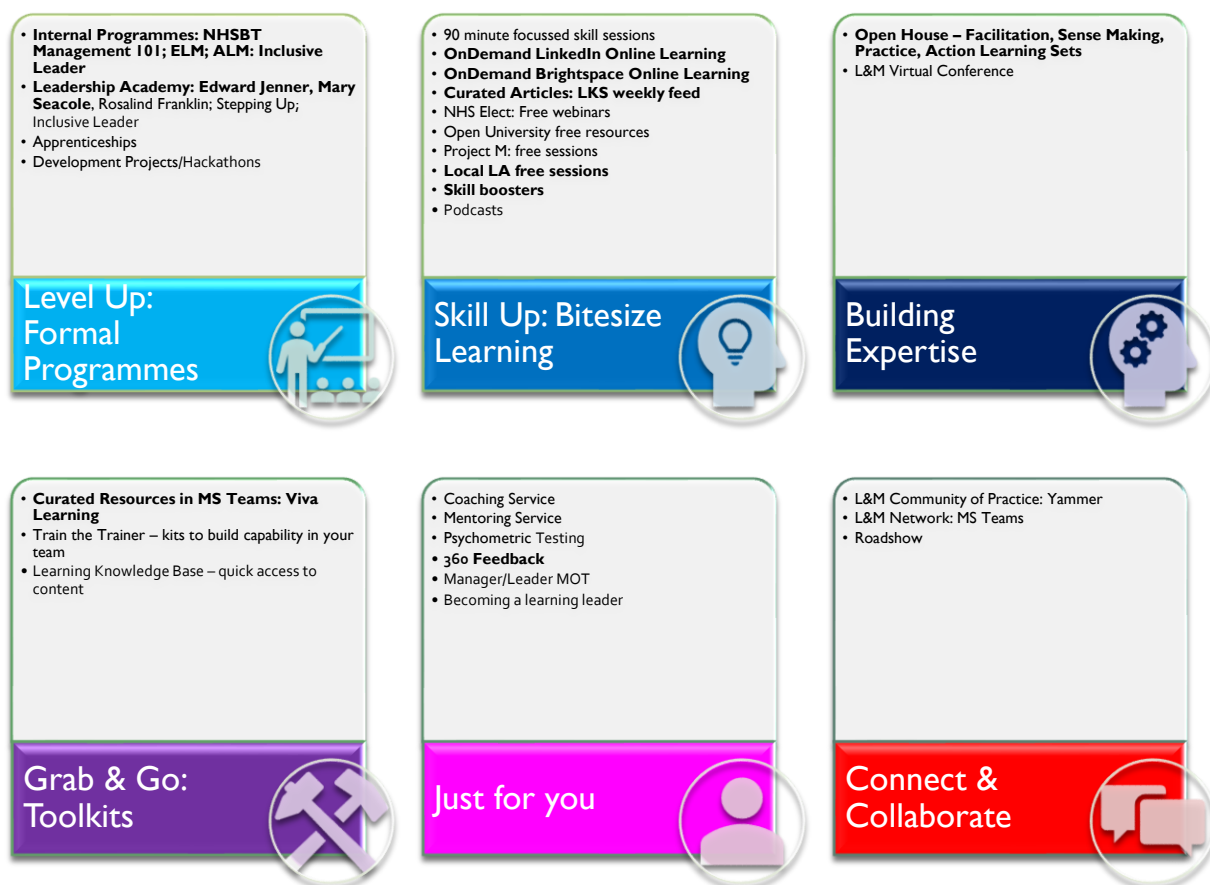
We recognised that NHSBT managers and leaders face a significant challenge in rebuilding an organisation that has been impacted by the pandemic, regulatory criticism, and the distrust of significant colleague groups. To enable this, it is necessary to take a systematic and systemic approach when building any offer to ensure that we minimise overwhelm, have no detrimental impact on business operations/efficiencies and do not lose sight of our requirements. The discovery work and the CQC recommendations have enabled the program team to develop a set of high-level outcomes, a vision, and a scope. The programme vision sets out our future aspiration to have:

'Reimagined and redesigned a suite of high-quality development products and services that will enable Managers and Leaders to thrive in their roles and create high performing, inclusive teams'

This is underpinned with a scope we describe as our Management Development Ecosystem that includes:

- Formal Programmes
- Bitesize Learning
- Building Expertise
- Grab and Go
- Just for You

Connect and Collaborate **Figure 1: Management Development Ecosystems**



Formal Programmes

The primary goal of the formal learning programmes is to provide a structured and intentional learning environment where our managers can acquire knowledge and skills in a systematic and organised manner, establishing a strong foundation for their day-to-day responsibilities. To achieve this goal, we have devised a comprehensive plan that includes using our existing programmes, such as ELM and ALM: Inclusive Leader in the interim whilst we develop new materials, including 'Management 101' and 'The Art of Middle Management' to support colleagues who are already in role. Additionally, we will maximise our apprenticeship offer up to level 7 to professionalise leadership and recognise it as a profession. To provide additional NHS accredited development we will also subscribe to the Leadership Academy offers, such as Edward Jenner, Mary Seacole, Rosalind Franklin, Stepping Up, and Inclusive Leader. Each of these programmes will have supported cohorts piloting them to ensure maximum effectiveness.

Bitesize Learning

Bitesize learning is to provide small, easily digestible pieces of information or learning experiences that can be completed quickly and conveniently. Through research our managers and leaders have repeatedly highlighted they are time poor when it comes to their personal development. Utilising bitesize learning will allow managers to fit learning into their busy schedules and access it on-demand when they need it. Bitesize approaches are proven to make learning more accessible and helps to improve learner retention by reinforcing key concepts in a more structured and repetitive way.

Both internal and external content will be readily and easily accessible through our SharePoint [Leadership & Management Toolkit - Home \(sharepoint.com\)](https://sharepoint.com). Content will include 90-minute focused skill sessions, OnDemand LinkedIn online learning, OnDemand Brightspace online

learning, curated articles through LKS weekly feed, NHS Elect free webinars, Open University free resources, Project M free sessions, local Leadership Academy free sessions, Skill Boosters, and podcasts. This will allow all managers and leaders to access individually relevant content.

Building Expertise

To build on from the bitesize learning approach, we have developed a more structured, yet still flexible and time-bound way of learning called **Open House**. This approach provides a facilitated 60-90 minute workshop each week for a period of four weeks, open to managers and leaders at any level. With a focus on addressing relevant organisational topics, Open House provides a comprehensive learning experience designed to provide a structured and supportive environment for managers and leaders to explore and address relevant topics in a collaborative way. By starting with facilitation/theory in week one, participants can gain a foundational understanding of the topic before moving on to sense-making, practice, and action learning sets. The inclusion of action learning sets in the final week is pertinent, as it allows our managers to apply what they have learned throughout the workshop series to real-life situations.

By leveraging the Open House approach, participants not only have the opportunity to build critical skills and competencies, but also to begin building a wider network of managers from across the organisation. This network can serve as a valuable resource for sharing good and best practices and providing ongoing support to one another. As participants work together to address relevant organisational topics, they develop a sense of camaraderie and mutual understanding that can help to foster a culture of collaboration and teamwork within the organisation. This type of network building can be just as important as the individual learning that takes place during the Open House workshops, as it can provide ongoing support and learning opportunities long after the formal learning program has ended.

Grab and Go

We recognise our managers are also central to developing their team capabilities particularly for those running frontline teams with limited ability to be off task for learning. To support our managers, we are also providing Grab and Go learning tool kits to provide quick and easy access to curated resources and information. These kits are designed to be accessible and portable, allowing managers to access relevant information whenever and wherever they need it and stay up to date with the latest knowledge and best practices in their fields and improve/enhance their skills and their teams with the ultimate aim of increasing knowledge, productivity and engagement. Currently we have in scope:

- Curated Resources in MS Teams: Viva Learning
- Train the Trainer – kits to build capability in your team

Just for You

Our personalised intervention offerings are designed to support the development of our managers and leaders in a bespoke and tailored way. Our coaching service provides one-on-one support, allowing individuals to focus on their personal development needs, while our mentoring service will offer guidance and advice from experienced leaders. Psychometric testing provides insight into an individual's strengths and areas for improvement, helping them to understand how they can develop their skills further. Our 360-feedback process allows individuals to receive feedback from colleagues, helping them to identify areas of improvement and build self-awareness. Finally, our Manager/Leader MOT will offer a comprehensive review of an individual's performance as a leader, highlighting strengths and areas for improvement, and providing a clear development plan for the future.

Connect and Collaborate

Connection and collaboration are vital components for effective learning and development. We recognise the importance of creating a community of practice and providing networking opportunities for our learners. Our Leadership & Management Community of Practice on Yammer allows learners to connect and collaborate with others across NHSBT, sharing knowledge and experiences. Our L&M Network on MS Teams provides learners with access to learning resources and a platform for ongoing communication and support. In addition, we are planning on hosting roadshows to bring our learning initiatives to different locations, promoting collaboration and encouraging face-to-face interactions between learners and our LPC team.

A Leadership and Management microsite highlighted earlier [Leadership & Management Toolkit - Home \(sharepoint.com\)](#) provides managers with easy access to some of key essential productivity skills to help them manage their teams daily activity.

1. Progress to date (October 22 – Feb 23)

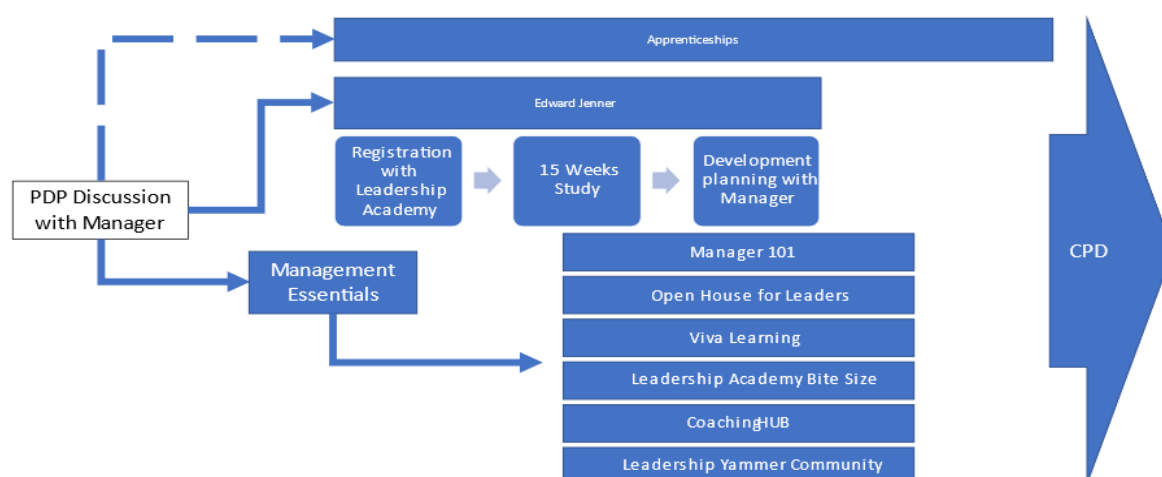
Appendix 1 provides data on the leadership and management development within quarter three 2022/23 and quotes from learners indicating how these interventions are supporting their needs and developing their skills.

Formal Programmes

We have made significant progress in our leadership development initiatives, and we are proud to report the following achievements to date:

Skills Matrix: We have collaboratively designed and alpha-tested a Management and Leadership Skills Matrix that empowers individuals to benchmark themselves and plan their professional development. This tool will enable our leaders to develop the necessary skills and competencies to drive success in their roles and be in control of their development and forms the basis of Leadership Good Practice (appendix 2). Additionally, this informed the development pathways for both aspirant/new and existing managers providing an easy-to-follow step by step guide to development.

Figure 2: Development Pathway (New Manager example):



Management Essentials: The scoping of the Management Essentials programme is currently underway. This programme is being designed as a facilitator taught induction into leading/managing at NHSBT and can follow on from the formal NHS Accredited Programmes

or be taken on its own. Its aim is to provide new managers with the necessary knowledge, skills, and tools to become successful leaders here at NHSBT. The programme covers essential topics such as navigating our internal systems, People: policies, practices and procedures, a day in the life of (guest speaker led) and will provide the ability to meet with members of the SLT to kick start the connection of being part of a wider leadership and management community

Manager 101: Our team has scoped and developed the prototype for Management 101, a comprehensive development self-directed programme for both aspiring and new managers. With up to 35 guided learning resources available on Brightspace, this program will equip managers with essential skills in Managing Yourself, Managing People, and Managing Teams and Functions (Appendix 3)

The Art of Management: We have also developed the prototype for a middle management development and supporting pathway (appendix 4) that will provide existing managers with a clear progression plan and support their ongoing development following the same themes as Manager 101 of Managing Yourself, Managing People, and Managing Teams and Functions but will go into further detail and additional content for existing managers. (Appendix 5)

Existing Programmes: We continue to run existing programmes to honour our current participants. This includes eight Inclusive Leader programs and four Coaching and Influencing programs.

NHS Accredited programmes: Our middle managers responded positively to our call nominations to pilot both the Edward Jenner and Mary Seacole programmes, resulting in significant progress for these initiatives. We currently have 22 colleagues on the Edward Jenner pilot, with a further 17 from TES and 11 from Blood Supply joining March cohorts. Additionally, 22 colleagues are on the waiting list for the next Mary Seacole cohort, set to open in Q1 2023.

Leadership for Women Workshop - Institute of Government & Public Policy: To support the Gender Pay Gap recommendations Four colleagues from our Women's Network have successfully applied to join the next cohort (Q1 2023) of the Leadership for Women Workshop. This program will further their learning and professional development while piloting the program's effectiveness. If successful, we will scope further cohorts for 2023.

We are committed to continuously improving our leadership development initiatives to support our leaders in achieving their full potential and driving success in our organization.

Building Expertise

Designed, delivered and evaluated 4 Open House hot topics (linked to Amber Alert and CQC plans):

- Rewarding and Recognising Colleagues
- Effective 121's to improve colleague retention
- Psychological Safety
- Necessary Conversations

and

- Great PDPR (booked for March and April)

To date 175 attendees have engaged with the sessions with 'Excellent' user feedback and a 69% increase in confidence following the session.

Grab and Go

Viva Learning: The 90-day pilot commenced January 2023 open to 8a and 8b managers only. The pilot is already demonstrating managers value the instant access nature of the materials and the opportunity to learn as a community of practice. In the first 5 weeks of the pilot over 1300 individual items of learning were accessed by an average of 14 users per day. Accessed content fell into 3 main themes of Authentic Leadership, Inclusive leadership, and being a Digital Savvy leader with further continued growth in users and learning accessed.

Just for You

We are in the process of procuring licenses to pilot an on demand, quality assured and supervised coaching offer in 2023/24 planning for up to 24 managers to access a qualified coach (unlimited use) for up to 6 months. Nominations will be sought via the PCP and Directors and will be piloted for 12months over 2023. The scope of an internal Mentoring scheme is currently in development and the existing 360 tool is currently being revised to make more easily accessible and more user friendly. Psychometric testing scope will be reviewed late Q1.

Connect and Collaborate

To kick start a digital community of managers the Open House initiative has created a Yammer page for all participants to engage with. We are currently seeing active membership of 86 participants. Feedback is positive focussed on learning, insights and sharing. Additionally, the Viva Learning Pilot has a Teams platform which again we are testing the effectiveness and value of digital community connection.

2. Our Key Learning to Date

As part of our original discovery work in 2022, we adopted a user research approach to comprehend the current state (as is) and the future state (to-be). We collaborated with a mixed group of managers across the organisation to inform our thinking and understand how the external environment continues to impact managers to date. This has led us to adopt a fundamentally different approach to both the design process and the materials created by LPC. We have tested the products and will continue to do so iteratively, building on our work to ensure its effectiveness across all programmes.

Since December 2022, spaces in the Open House approach have been oversubscribed, and managers have been enjoying the programme and valuing the opportunity to build on their learning over the course of the month.

Feedback from the Edward Jenner Pilot group indicates that the self-directed learning approach can be quite isolating. Therefore, we have implemented a support process based on the use of learning sets. This is designed to reinforce the benefits of learning in a community and encourage collaboration among managers as they learn. This has been critical insight when designing the formal learning initiatives and has meant we have included additional human touch points in all of our programmes that require self-directed learning.

Our key priority from April onwards is the implementation of our formal learning initiatives. These initiatives will be piloted, tested, and evaluated to ensure that we maintain the required numbers, minimise disruption to the business, and fundamentally create a shift in behaviours and knowledge across our management community.

3. Next Steps Plan of Action

Great progress has been made to date but recognise still some way to go to realise the full ambition around the programme of work, this will continue over the forthcoming year and into 2024 as planned.

	April to June 2023	July to September 2023	October to December 2023	January - March 2024	Narrative	Planned numbers for 23/24
Middle Manager Skills Matrix	Complete Alpha Testing and evaluation	Test and Go Live	Design technological intervention			n/a
Manager 101	Go Live Rollout in Brightspace	Iterate, refine, & schedule deployment for 2023/24			Current approx. 200 users per year – following launch anticipating to double numbers	400
Art of Management	Go Live Blended programme	Iterate, refine, & schedule deployment for 2023/24			Current approx. 200 users per year – following launch anticipating to double numbers	400
Manager Essentials	Scope and develop products and learning pathways	Go Live	Iterate, refine, & schedule deployment for 2023/24		Still in discovery phase	Tbc 100% of all new appointed 'new' managers
Viva Learning	Live from Jan 23 Complete evaluation of Pilot	Develop business case, based on Pilot evaluation	TBC	TBC		350
Edward Jenner	Live Complete Evaluation of planned 4 pilot cohorts	Rollout 2 further cohorts			50 nominees for Q1 & Q2 (3 pilot cohorts) 40 nominees for Q3 & Q4 (2 full cohorts)	90
Mary Seacole	Awaiting Pilot date TBC (expected date April/May 23)				22 Planned – awaiting confirmation from NHS Leadership Academy for dates. Additional numbers will be dependent on evaluation	22
Open House for Leaders	Delivery of Monthly Scheduled Events – minimum of 60 managers per month Live				1 subject per month x12 Each month 3 Cohorts per subject 20 places per cohort (60 places per month)	720
Coaching Service		Go Live with Pilot coaching service	Complete Evaluation based on first 12 individuals	Iterate, refine, & schedule deployment for 2024/25	Licences for 24 Coachees	24

We will also be exploring how we can support the development of Middle Managers using:

- Volunteering and Stretch Assignments
- Leadership Academy BME specific programmes
- Apprenticeships

4. Recommendations

The Board is requested to:

- Note the update from the Leadership Performance and Culture Team

Appendix 1: Results for period Oct-Dec 2022 (Quarter 4 results to be published April 2023)

LEADERSHIP & MANAGEMENT DELIVERY

Update Jan 2023


Blood and Transplant

Delivery of formal programmes

75

managers engaged in courses on Inclusive Leadership, Manager as Coach and Influencing Skills.



Open House

This is a four-hour development opportunity for managers and leaders to explore a topic mapped to identified learning needs across the organisations. Sessions have included Reward and Recognition, The Value of Great 121s and Psychological Safety. Attendees are invited to join an associated community of practice.

74

have subscribed.

114

managers/leaders have engaged.



of attendees felt very confident in creating a psychologically safe environment upon completion of all 4 sessions compared to 10% at the start.

Leadership Academy Pilots

Edward Jenner offers a first line management development programme.

55

managers across the middle management spectrum have signed up.

28

currently studying.



The pilot launched November 2022 for the first cohort with further cohorts launching January and again in February 2023.

Mary Seacole offers first line leadership development.

22

first line leaders identified for the programme. They have completed an initial introduction and we await dates from the Leadership Academy to open their application window.

Support will be given by Learning Services to complete the application.

Manager & Leader Online Toolkit

This is a SharePoint site where we provide a range of learning and support resources to managers/leaders.

212

individuals have accessed the Toolkit since it's launch.



Learner Quotes

“Has been really good to listen to other people’s experiences and what has worked well for them and learning also, Have found it really well facilitated from my opinion. “

“The content and the way it was spread over a number of sessions was also good, it challenged our thinking, gave the opportunity to reflect and also a chance to feedback on our reflections.”

“I think what worked well was hearing from others experiences and sharing ideas ... Thanks again, I really enjoyed the group and the content.”

“I liked the way the content was presented and the approach.”

“ ... it made me think and to do better.”

“Really enjoyed these sessions and getting to know more people across the organisation.”

“ ... we had some thought-provoking conversations, very constructive, and that the group ”

"Excellent course with great resources."

"Very enjoyable and informative"

"Eye opening..... Valuable learning to be applied in daily practise."

"Very important information was covered in the course and I hope it is rolled out to all bands eventually to promote inclusion across all levels"

"The content was really good and thought provoking"

"Really inspiring and emotive learning materials"

Appendix 2 – Skills Matrix – DRAFT example

Skills	Level of Competency			
	Awareness	Working	Practitioner	Expert
	You know about the capability and have an appreciation of how it is applied in your situation.	You can apply your knowledge and experience of the capability, including tools and techniques. You can adopt those most appropriate for your environment.	You know how to share your knowledge and experience of this capability with others, including tools and techniques. You can define those most appropriate for the environment.	You have both knowledge and experience in the application of this capability. You are a recognised specialist and adviser in this capability including stakeholder needs, generation of ideas, methods and tools. You can lead or guide others in best-practice use.
Managing Self				
Understands what is expected of them in their role	Understands their role beyond job descriptions. Is able to articulate how their role interacts with other roles and its benefits to the organisation	Has the skills and tools to deliver their role and is able to support roles working around them	Develops the role in-line with changing requirements and is confident when using their skills in varying organisational contexts and situations	Is regarded as an expert specialist in their role. Works regularly across the organisation and scans the horizon for opportunities to use their skills both internally and across the wider system
Understands the differences between management and leadership - and how to utilise their own skills to influence the best outcome	Understands the necessary management skills for their role and when and where they should be applied. Has awareness of what it means to 'lead self' and the techniques involved in this	Has a strong foundation of management and leadership skills and behaviours; is routinely up to date with appraisals and 1-2-1s. Is seen as a leader within their work function and looks to develop their management and leadership skills regularly	Is comfortable being seen as a leader within their function. Lives the organisational values and looks to develop those around them. Is a confident manager and a manager of managers. Has an in-depth understanding of all management systems	Is regarded as a leader of the organisation and more broadly in the external systems in which we work. Looks to develop leadership across the organisation providing vision and advice to other leaders and specialists. Is an expert at managing functions and multiple high profile workstreams

Appendix 3 – Management 101

MANAGER 101

Managing Yourself

- Become more self aware
- Be organised in a disorganised world
- Understanding people
- Developing your resilience

Managing People

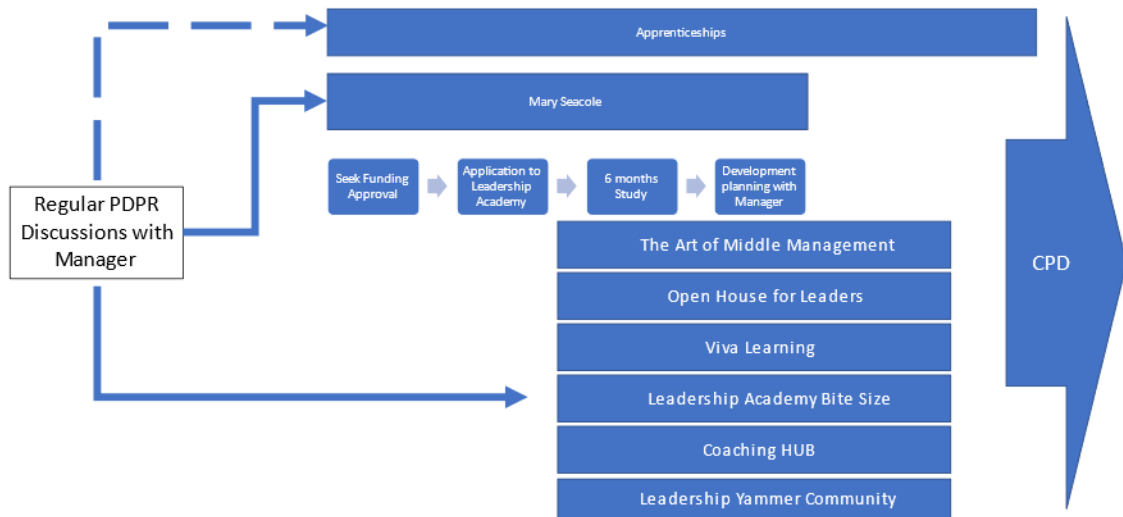
- Diversity and Inclusion in the workplace
- Managing Performance
- Praise and Redirection
- Setting Objectives
- Giving and Receiving Feedback

Managing Teams and Functions

- How to reward and to recognise colleagues
- Understanding Health, Safety, Wellbeing and Safeguarding
- Being able to hold positive and constructive necessary conversations
- How to effectively and productively Manage NHSBT Systems
- Creating and delivering a positive team identity

Available via Brightspace- this offering will continue to grow

Appendix 4 – Middle Management Pathway (Existing managers)



Appendix 5 – Art of Management Content

THE ART OF MIDDLE MANAGEMENT

Managing Yourself

- Leadership Styles
- Managing your Time
- Critical Thinking
- Emotional Intelligence

Managing People

- Managing Performance
- Developing your Colleagues
- Motivating & Inspiring Others
- Managing and Leading Change
- Resolving Conflict
- Influencing and Communication
- Communicating and Implementing Strategy
- Inclusivity

Managing Teams and Functions

- Remote Working
- Managing Data
- Managing Finances and Budget
- Managing Quality Systems & Processes
- Recruiting
- Managing People Policy and Process
- Effective Reporting

DRAFT

Available via Brightspace- this offering will continue to grow