

# CASE STUDY: RELEASING POTENTIAL – LEADERSHIP PROGRAMME FOR RESEARCH AND DEVELOPMENT MANAGERS

The Releasing Potential programme was first commissioned by the NHS Research and Development (R&D) North West team in 2012. Initially this programme was informed by a programme developed by Mark Brandreth, the Managing Director of Trafford Provider Services at NHS Trafford to provide an in-house approach to developing talent amongst clinical and managerial staff at Band 7.

As a result of its success an eWIN good practice case study was written up, which was published in 2011. This was picked up by Maria Thornton, the then Assistant Director of Research and Development at NHS North West, who saw the potential for using such an approach with R&D managers. Transferring learning from an already tried and tested approach speeded up the development of the programme.

*“One of my responsibilities is to source ideas for development and to ‘steal with pride’ i.e. to take successful ideas and develop them, including up-scaling models and programmes, so that they may be applied more widely across the NHS”* – Maria Thornton, 2011.

Although Maria identified the potential to tailor this programme and carried out initial meetings, the project went on to be managed by Steven Agius who directed it within NHS North West before handing over to Lynne Goodacre in the NHS Research and Development North West team

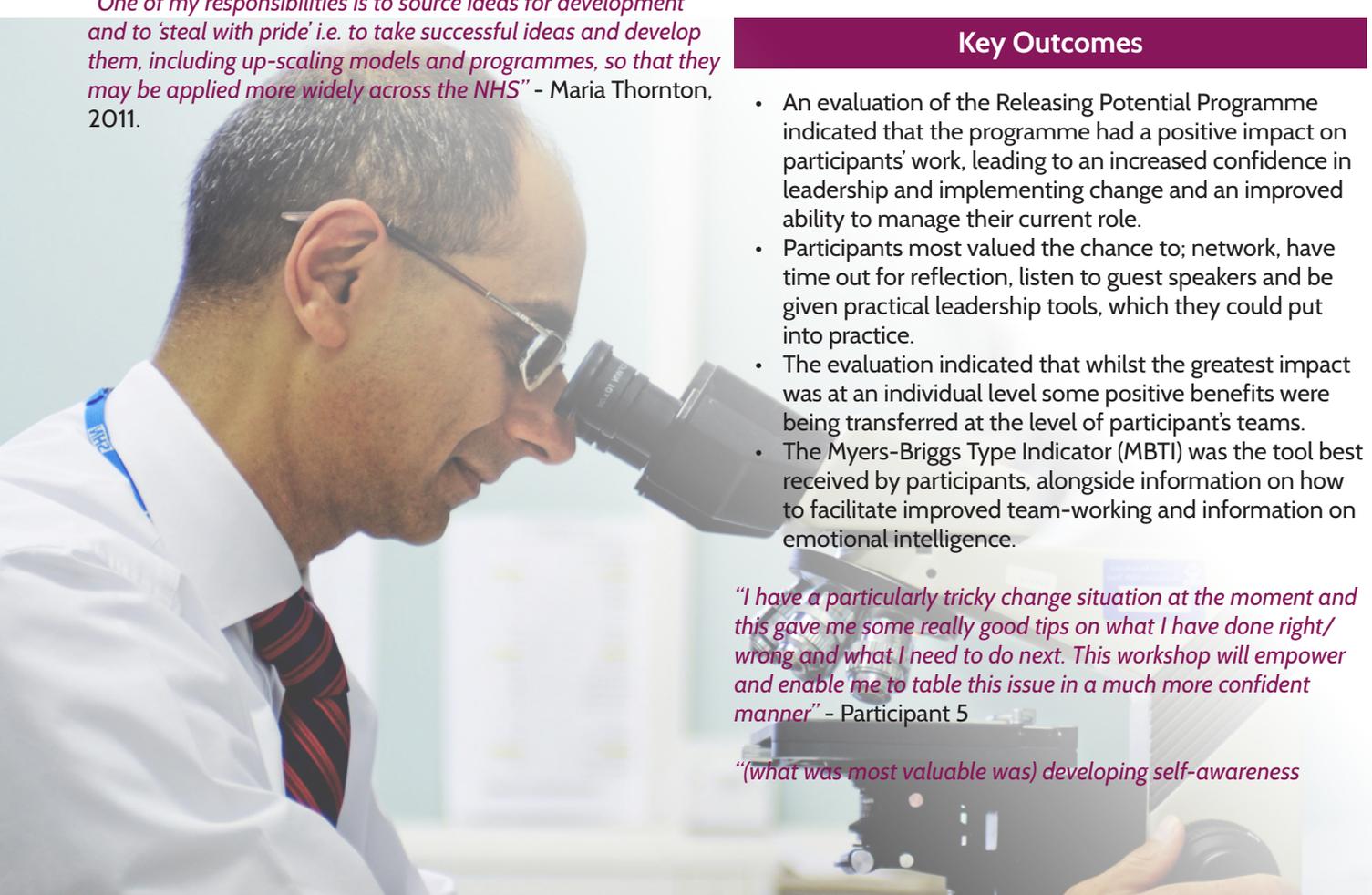
The NHS Research and Development North West team commissioned People and Change Experts Ltd (PACE) to work with key stakeholders from the R&D community to further develop the programme in order to make it more suited to the team’s specific needs; the overall aim of which was to develop the leadership potential of senior R&D managers within NHS organisations across the North West. A cohort of 25 individuals from 16 NHS organisations participated in the programme which comprised a series of one day workshops, two network learning groups and an organisational placement, details of which can be found within this case study and also within the appendices.

## Key Outcomes

- An evaluation of the Releasing Potential Programme indicated that the programme had a positive impact on participants’ work, leading to an increased confidence in leadership and implementing change and an improved ability to manage their current role.
- Participants most valued the chance to; network, have time out for reflection, listen to guest speakers and be given practical leadership tools, which they could put into practice.
- The evaluation indicated that whilst the greatest impact was at an individual level some positive benefits were being transferred at the level of participant’s teams.
- The Myers-Briggs Type Indicator (MBTI) was the tool best received by participants, alongside information on how to facilitate improved team-working and information on emotional intelligence.

*“I have a particularly tricky change situation at the moment and this gave me some really good tips on what I have done right/ wrong and what I need to do next. This workshop will empower and enable me to table this issue in a much more confident manner”* – Participant 5

*“(what was most valuable was) developing self-awareness*



*using the MBTI to look at my motivations and reactions. Using what i have learned to look at how I can use the techniques and materials to better manage my team” - Participant 13*

The work of the NHS Research and Development North West team is focused upon: building R&D capacity throughout the full range of NHS organisations, making and supporting connections across the boundaries of organisations and existing networks, and working collaboratively to facilitate the generation of ideas and research questions across multiple networks. Based in Manchester and with a regional remit, the team aims to co-create a strategic approach to NHS R&D across the North West by providing support and contributing to the work of a wide range of regional and national networks and forums.

The range of networks and resources upon which the team draws, positions it strongly to undertake time limited project work, such as the Releasing Potential programme, enabling it to be responsive to new initiatives that complement the work of organisations such as Health Education North West (HENW), the National Institute Health Research (NIHR), and other bodies where research and innovation are key themes.

It was recognised that R&D managers did not often have access to the same leadership development opportunities as other members of staff due to their location and placement within NHS organisations. Therefore it was decided that it would be beneficial to develop a leadership development programme aimed directly at such managers.

In 2011 Maria Thornton read NHS Trafford’s [Release – Leadership Development Programme case study](#) which summarised succinctly the reasons for implementing

experience-based learning, and for putting in place each distinct facet of the programme. For example, the use of psychometric testing in order to allow the programme to be tailored to the styles and needs of the group, and action-learning sets to allow participants to help one another overcome obstacles. As a result Maria contacted the author to arrange a meeting with Mark Brandreth and to gain further background information

*“I had a light bulb moment upon reading the ‘Release: Leadership Development Programme’ case study. Our team had been looking for a way of supporting R&D managers in gaining leadership skills, as well as educating other NHS managers on the benefits of embedding R&D as core NHS business. This programme demonstrated a very plausible way of achieving this without having to re-invent the wheel, as it could be tailored very easily to both distinct groups and Mark Brandreth was very supportive in helping us to use this case study to inform the development of our own programme. His input was invaluable, because as well as the content provided within the case study itself, he met with the team face-to-face” - Maria Thornton*

## Key Aims

- Develop the leadership potential of senior R&D managers within NHS organisations across the North West
- Integrate a model for sustainability into the programme to facilitate the development of an on-going community of practice which could support the work and continual development of R&D managers in the North West
- Investigate the impact of the programme on participants who attended, in order to aid decisions about further training provision of the Releasing Potential programme

## Key Stages of Setup

In 2011 NHS Trafford’s Release – Leadership Development Programme case study was picked up by the Assistant Director of Research and Development

Subsequently discussions took place around how best to develop the Releasing Potential programme with key stakeholders to help the NHS R&D NW team deliver a range of its objectives in collaboration with key associates.

A contract to develop and deliver the programme was awarded to People and Change Experts (PACE) who undertook a focus group with directors of R&D, and worked with the team at NHS R&D NW and a project steering group to ensure that the programme was designed to meet the needs of the NHS R&D community.

The first phase of the programme was rolled out in 2012 and ended in January 2013. The second phase is currently underway.

## How it Works

In total 25 participants were recruited to the programme. Participants attended workshops, launch and close events as a whole group. Workshops were themed and involved facilitation, activities, and a guest speaker for each topic. The launch and closing events were structured in a similar way. Network Learning Groups (NLGs) involved smaller, facilitated groups of participants who met twice throughout the duration of the course

Participants were asked to identify a clinical partner to bring to the programme, and to identify an organisational mentor who would support them. A placement for each participant was also encouraged to facilitate learning across organisations.

Evidence-based approaches were used for all sessions, with tools and tips for practical application. Participants were encouraged to reflect using a reflective log, and encouraged to undertake a case study and/or a project to apply their learning to practice.

### Programme Content

- launch event – which addressed the impact of effective team leadership on patient outcomes
- four workshops:
  1. Leading Change – Perspectives on change, human dimensions, tools for change
  2. Leading Self – MBTI and leadership, communication, impact of different styles and preferences, followership
  3. Leading Peers – influencing and negotiation, emotional intelligence, impact and presence, motivational theory
  4. Leading Collaboration – Adaptive leadership, collaborative networks
- two Network Learning Groups (NLGs)
- an organisational placement
- generation of a personal reflective case study to demonstrate application of learning
- closing event

### Evaluation

Both qualitative and quantitative data was collected from questionnaires and feedback forms. The pre-programme questionnaire measured participants' expectations of the programme and asked them to rate 40 statements relating to different leadership elements in order to obtain an overview of self-assessed leadership capabilities. The post-programme questionnaire measured participants' experiences of the programme and then re-measured the leadership items given in the initial questionnaire, to look for any measurable differences.

More detailed qualitative data was also captured from telephone interviews conducted with six participants. Interviews were targeted at a range of individuals in different healthcare settings from across the North West area. Interviews were semi-structured and lasted approximately 30 minutes. Questioning covered the following areas; expectations of the programme, thoughts on content/structure/individual elements, thoughts on the impact of the programme, what further development needs the participant might have and further support of the cohort going forward. This data was then thematically analysed and all sources were triangulated to obtain common themes regarding the programme's impact and any operational issues or areas for development.

## Resources

Funding and resource was required for:

- programme development and facilitation
- placement co-ordinator
- venue hire - with facilities for formal presentations and small group working
- steering group
- R&D team strategic input and oversight of project management arrangements
- administration
- production of bespoke materials
- books
- NHS Leadership Toolkits
- evaluation costs

## Key Challenges

- Obtaining time to attend all of the workshops and network learning groups was a challenge for some participants and whilst participants were asked to identify a clinical partner to attend the programme with them this proved a challenge for the majority of people who were unable to do this.
- Over two thirds of participants reported that they did not secure an organisational mentor alongside the programme. The main reasons for not doing so were due to being unaware that this was an option or requirement, or due to time constraints or organisational challenges making this difficult. However, a number of those without a mentor indicated that they were either planning on getting a mentor or looking in the NW mentoring scheme.
- Some participants felt that there was not enough time allocated to cover all of the course content each day and that more time for specific activities would have been useful
- The programme had a robust evaluation framework built into it from the outset. Despite this, the response rates following each workshop were inconsistent. Feedback was generally very positive.

## Key Learning

- The combination of approaches utilised within the Releasing Potential Programme proved an effective model for increasing leadership skills and expertise.
- Running the programme over a period of several months proved an effective mechanism for informing the development of a self-supporting community of practice

## Sustainability

A sustainability model was incorporated into the programme to inform the development of a community of practice for R&D managers. This is currently being embedded by equipping R&D managers with group facilitation and action learning skills to run their own Network Learning Groups.

## Next Steps

Having completed the first phase of the programme the participants are in the process of completing the second phase. This comprises two further workshops to consolidate their learning and develop skills in facilitation and strategic networking. The participants are also forming network learning groups which will meet on four occasions over the next 12 months.

## Supporting Material

- Appendix 1 – Full evaluation report
- Appendix 2 – Videos providing overview of programme and key presentations
- Appendix 3 – Workshop programmes

## Further Links

- NHS Research & Development North West Website <http://www.research.northwest.nhs.uk/>

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