

Learning to Lead

A tiered approach to developing clinical leaders in Postgraduate medical training

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Introduction

Healthcare delivery is now the responsibility of all individuals working collaboratively within complex systems that cross disciplinary and organisational boundaries. Effective clinicians need to be able to work within *and* with these systems in order to deliver high quality effective care for patients and patient populations. In order to develop these skills, clinicians need to be exposed to a variety of learning opportunities within the domain of management and leadership.

There is growing evidence that supports a strong relationship between the engagement of clinicians in the leadership task and a range of healthcare quality and outcomes. West M et al 2015

On completion of training all doctors find that part of their work includes a leadership and management role and for a small cohort it may well form a much larger role should they choose a career path of senior medical leadership.

This toolkit is designed to help trainees to develop competencies to prepare them for life as a consultant. It supports the need for practical experience in leadership and management during training and seeks to put theory into practice. The toolkit is flexible, meaning it can be used in its entirety, or to complement existing leadership or management training programmes. It is designed not just to be a point reference but to come together as a portfolio of work over the course of a speciality training programme.

It is stressed that merely undertaking a leadership or management activity is no evidence of leadership competency development unless the trainee has thought about it/ reflected/ received feedback **and** they have linked behaviours to an established leadership framework , such as the Medical Leadership Competency Framework or the Healthcare Leadership Model. A reflective template is included at the end of this toolkit to facilitate the reflective process.

General Principles - What exactly is involved in using the toolkit

The toolkit is designed around both trainee and educational supervisor incorporating it into personal development plans. It can then be used year on year as the trainee progresses through the speciality programme, with the end result being a portfolio of activities and learning logs reflective of the trainee's personal journey through management and leadership.

The role of the trainee

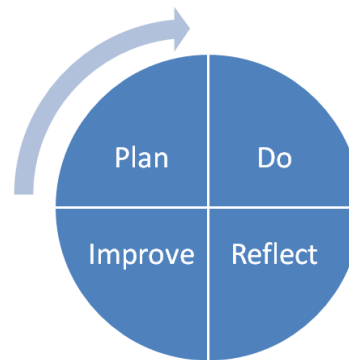
- All trainees at entry into specialty training should carry out the leadership academy self-assessment tool which is part of the *Managing yourself* domain. <https://www.leadershipacademy.nhs.uk/resources/healthcare-leadership-model/supporting-tools-resources/healthcare-leadership-model-self-assessment-tool/>
- Trainees are expected to complete a maximum of two projects per year, chosen from any of the domains. However, within each domain are useful links which should be used for self-directed learning. The projects form practical application of this knowledge.
- Trainees are not restricted to the projects suggested under each domain and encouraged to develop their own projects.
- In each of the first two years of training, trainees are strongly encouraged to choose one project from the *Managing Yourself* domain, alongside another project chosen from any of the other domains.
- All projects should be completed during the training year and mapped in line with the length of the trainee's placements.
- Upon completion of training, trainees should aim to have completed projects from each of the eight domains.
- Trainees are encouraged to refer to the healthcare leadership model dimensions when carrying out projects and reflect on the process of higher/strategic level thinking in relation to their activities.

The role of the supervisor

- At the start of each training year, supervisors will agree with their trainees which projects the trainee should undertake under which domains. This should be a joint decision and should take into account current opportunities within the organisation
- The supervisor role is key to ensuring that the projects chosen are appropriate to the trainee's level, and achievable given the time and resource available.
- Together the trainee and supervisor will develop a plan for completing each project; resources and signposting will be agreed, and progress will be reviewed regularly.
- Evidence of completion for the projects chosen will be uploaded to each trainee's ePortfolio for review at ARCP every year. The format of evidence provided will be at the discretion of the supervisor.
- A summary line of progress with the toolkit could be incorporated into the Educational supervisors final report for ARCP.
- Supervisors are not expected to manage any of the projects themselves but are meant to signpost trainees to the appropriate projects for them to complete independently.

- Trainers should note that a large number of the projects undertaken within the programme are practical and can be for the benefit of their department. In many cases trainees will be undertaking projects that can save them time e.g. by requesting a new piece of equipment on behalf of their department. Within your organisation, it may be useful for supervisors to come together and put on face to face workshops with trainees to help solidify learning and exposure with certain domains. Eg a face to face workshop around team working exploring individual roles
- For those trainees who demonstrate a natural flare or wish to take their learning in management and leadership further, trainers should discuss the options available in the 'taking it further section' at the end of the toolkit.

Similar to the principles of the Plan-Do-Check-Act cycle¹, for any project undertaken by trainees they are expected to plan, do, and then reflect in order to improve their leadership and management skills.



Tiered learning

The toolkit incorporates a tiered learning structure. With each level building on the one before and developing in level of challenge for the trainee. Other factors that might affect the type of activity or project chosen are the trainee's preferred learning style, experience or interest in a particular area.

¹ For more information visit: <http://www.hse.gov.uk/managing/plan-do-check-act.htm>



Trainers and trainees are advised to start with an easier activity/ intervention or project . Trainees can choose activities, interventions and projects which increase in complexity as the trainee becomes more mature. If a trainee's level of competence allows them to undertake a more difficult intervention at the beginning of the year, it may be advisable for them to undertake an easier project in their next placement, to balance out the workload over the course of the year.

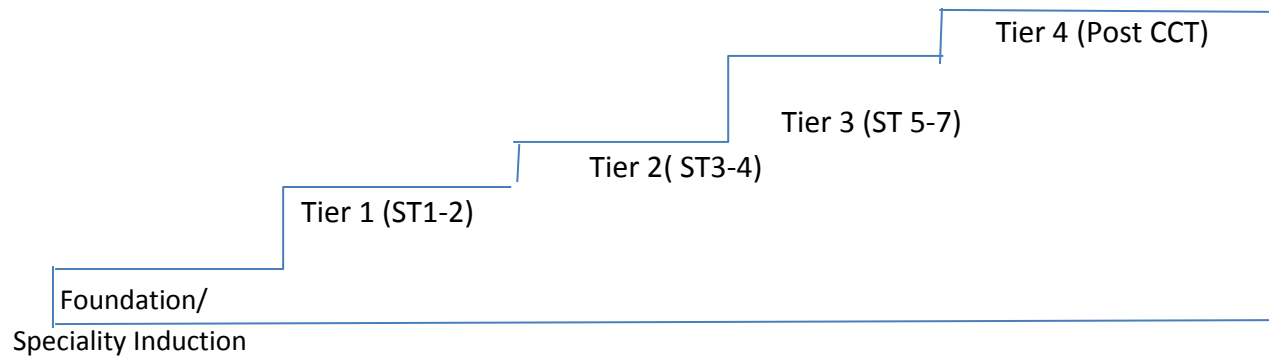
Principles

The interventions / activities should be relevant, predominately work based, be multi professional and inclusive. Most of the interventions and resources identified in this framework are either online tools or resources, the aim being for trainees to access the resources either individually or in groups at a time convenient to them and then hold discussions and reflections with their educational supervisor/ trainer, either in the workplace or via tutorials. **The red text indicates what the stakeholders consider to be essential elements.**

Context

The interventions/ resources have been mapped to the NHS Health Care Leadership Model [here](#) and are in line with the Developing People Improving Care Framework [here](#) and the GMC Generic Professional Capabilities framework [here](#)

The toolkit is broken down into elements: Foundation, Tiers 1 to 4 .



Learning to Lead Toolkit

Resources and training courses

The next few pages provide examples of activities or projects which can be undertaken at different stages in training. Supervisors and trainees may wish to use and tailor these examples, or develop their own activities or projects depending on the specialty. We would also encourage using resources available within individual trusts to support work place-based learning.

The Toolkit will be regularly updated, and new resources will be added as they become available. This blended approach to learning is centred on both self-assessed and peer and learning, as well as by discussion with educational supervisors.

At the end of the toolkit is a template reflection tool, designed for the trainee to be able to log a reflection on their activities through the year. By the end of the training programme, the toolkit will provide a summary of activities and reflection logs.

Accompanying Worksheets

Alongside this toolkit has been developed work sheets for trainees and educational supervisors to use. Based on the domains of the MLCF the worksheet are excellent tools to prompt learning.

Learning to Lead

The red text indicates what the stakeholders consider to be essential elements.

Speciality Induction

Suggest intervention/ activity or topic	Educational resources / support available	How this could be facilitated	Health Care Leadership Model Dimension
NHS Structure, understanding the health and care system	Watch and reflect on the Kings Fund clip here	Introduced by Heads of School during specialty programme induction	Connecting our service
Compassionate Leadership	Leadership in Today's NHS here Reading - Being Mortal, Atul Gawande	Individuals are invited to watch the clip and then have facilitated discussions/ reflection	Leading with care
Undertake a Leadership Self-Assessment	Health Care Leadership Model self-assessment tool here On line learning- Managing Yourself here Personal Wellbeing here	Undertaken individually then reflect with Educational Supervisor	All
Write a reflective piece	The trainee is asked to write a reflective piece in each year of training preferably using specific examples on one of the items below: <ul style="list-style-type: none"> • <i>What is my natural style of communication when not under pressure?</i> • <i>What is my style of communication when challenged?</i> • <i>How do I react to stress, criticism and how do I develop resilience?</i> • <i>How do others perceive me in non-stressful and stressful</i> 		Managing Yourself here

	<p><i>situations?</i></p> <ul style="list-style-type: none"> • <i>How do I challenge myself to learn things outside my comfort zone</i> 		
Articles and Research on Leadership	<p>Read and reflect-</p> <p>Leadership Knowledge Hub here</p> <p>Reading - Leadership, Plain and simple, by Steve Radcliffe</p> <p>Journal- BMJ Leader</p>	Personal Reading	All

Tier 1- Foundation, (ST1, 2)

Suggested Activity	Educational resources / support available	How this could be facilitated	HLM Dimension
Read the Developing People Improving Care Framework	Developing People Improving Care Framework here	Personal study	ALL
Leadership focused action learning sets (using the Edward Jenner Foundation in Leadership Programme modules as a focus)	Edward Jenner Foundations in Leadership online free modular training here	121 with educational Supervisor and facilitated action Learning sets	Developing capability
Participate in active trainees committee /become education fellow	Information is available via local educational supervisors, training programme directors. Involvement with local trainees networks	Through local educational supervisors, training programme directors.	Developing capability
Shadow a Trust/ CCG board member/ attend a board meeting	Link with the organisations' leadership lead.		Sharing the vision
Manage a rota	This project gives insight into the complexities of rota management as it involves designing a rota that provides adequate staffing levels and that accounts for annual leave, study leave, training days and taster weeks, whilst complying with the European Working Time Directive.		
Chair a meeting	This could be within the department as part of a quality improvement project or trainee groups.	With support of educational supervisor/ trainer	Developing capability

	Requires planning, including clear aims of the meeting, agenda setting, communication, allowing attendees to contribute and time-keeping		
Undertake a Health Care Leadership Self-assessment	Health Care Leadership Model self-assessment tool here	Self-administered and reflection with educational supervisor/ trainer	Developing capability
Developing Self Awareness	Utilise the online tools and resources here including which include the following- <ul style="list-style-type: none"> • Resources- EQ • Resilience • Team working • Compassion • Difficult conversations/ Feedback skills <p>Myers Briggs personality tool- maybe available locally</p> <p>Leadership and listening blog here</p>	Self-administered and then reflection with peers/ educational supervisor/ trainer colleagues	Engaging the team
Receive Coaching	Accessed via local leadership academies websites here	121 in person or via skype/ telephone available via local leadership academies	
Develop Quality Improvement skills and knowledge	Via Local QI lead within the Trust/ CCG Video Clips- Transparency, Compassion and Truth in Medical Errors – Leilani Schweitzer - TEDx University of Nevada here	Undertake the modules whilst undertaking a QI/ audit project. Reflect progress with Educational Supervisor and	Inspiring shared purpose

	<p>The Moral Era – Keynote by Don Berwick at the 2015 National Forum on Quality Improvement in Healthcare (YouTube) here</p> <p>Data presentation; Mesmerising measurement: engaging teams in measurement for improvement here</p> <p>NHS Improvement , interactive guide to using data to drive improvement. The focus is on statistical process control charts, but it completely demystifies the process and is accompanied by interactive exercises, videos and a wealth of resources-</p> <p>https://improvement.nhs.uk/documents/2748/NHS_MAKING_DATA_COUNT_FINAL.pdf</p> <p>NHS Improvement academy - Online quality improvement e modules here</p> <p>A useful website/ resource on patient safety here</p> <p>NHS Scotland QI , Quality Improvement hub here</p> <p>Wessex School of Quality Improvement here</p> <p>RCGP- Quality Improvement Projects- here</p> <p>Quality Improvement in Healthcare Online course; here</p> <p>Health Foundation , improvement tools and Q initiative here</p> <p>Wessex Academic Health Science Network QI hub here</p>	<p>link with the organisations QI lead.</p>	
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	<p>NHS School for change agents here</p> <p>Read - the free online book: 'Safer Healthcare: Strategies for the Real World' by Charles Vincent & René Amalberti , here</p> <p>Read - Black Box Thinking by Matthew Syed and a podcast from him called ; Learning from life and death - http://www.bbc.co.uk/programmes/b08wmpnl</p> <p>Read- Free online book. Complications; -A Surgeon's Notes on an Imperfect Science here</p>		
<p>Undertake mentoring/ near peer support' for medical or physician associate students?</p>	<p>Accessed within the Trusts/ CCGs or locally via the leadership academy here</p>	<p>Individually via local leadership academies or Educational Supervisors</p>	<p>Sharing the vision</p>
<p>Faculty of Medical Leadership and Management opportunities and resources</p>	<p>Faculty of Medical Leadership and Management Here Trainee member/ steering group/ resources</p>		<p>ALL</p>
<p>Watch/ listen and reflect on Leadership TED talks ;</p>	<p>General Leadership- Podcast- "The Future of Leadership" by Margaret Heffernan http://www.bbc.co.uk/programmes/b06shyrh</p> <p>Simon Sinek ; Why good leaders make you feel safe here and How Great Leaders Inspire Action here</p>	<p>Can be viewed individually and reflected on individually or with with peers/ teams</p>	<p>ALL</p>

	<p>Brene Brown, The power of vulnerability here</p> <p>Dare to Disagree Margaret Heffernan here</p> <p>Teams Super Chickens Margaret Heffernan here</p> <p>Teamwork a user’s guide. BMJ learning here</p> <p>Followership Dancing guy https://www.youtube.com/watch?v=fW8amMCVAJQ</p> <p>Personal Impact, Amy Cuddy - Your Body Language may shape who you are here</p> <p>The power of Failure, JK Rowling here</p> <p>Mindfulness, Read Ruby Wax Frazzled Down load the Headspace , free app</p>		
<p>Managing Change</p>	<p>Read- Who moved my Cheese, Dr Spencer Johnson and / or Managing Transitions, William Bridges</p> <p>Managing Change, BMJ learning module; here</p> <p>BMJ module Introduction to change management here</p>		
<p>Influencing skills</p>	<p>Watch and reflect-</p>		

	Science of Persuasion here		
Human Factors Training/ Patient safety	Locally delivered programmes in organisations plus- Video clip - just a routine operation- here	Watch and discuss in peer groups	Inspiring shared purpose
Understanding Informatics	Module available here		Developing capability
Inclusion	<p>Access locally run training</p> <p>eLearning for Healthcare Equality and Diversity online module here</p> <p>Watch and reflect- The Danger of Wilful Blindness here</p> <p>What does my headscarf mean to you Yassmin Abdel-Magied here</p> <p>Implicit bias; podcast http://www.bbc.co.uk/programmes/b08slvk8 And Jayne-Anne Gadhia, http://www.bbc.co.uk/programmes/b08yqdzg</p> <p>Sheryl Sandberg, podcast- http://www.bbc.co.uk/programmes/b08z9b81</p> <p>Women in Leadership ; TED Talk from Sheryl Sandberg here</p> <p>Michael Kimmel on Gender Equality here</p>	Watch individually and reflect or in peer groups with facilitated reflection from ES	Leading with care
Professionalism	Watch, reflect and discuss Army Lieutenant General David Morrison here	Facilitated discussion with peers or ES	
Patient / Citizen Leadership	Shadow a Trust Governor/ Patient Leader		Leading with care

Tier 2- Intermediate (e.g. about ST3,4)

Suggested Activity	Educational resources / support available	How this could be facilitated	Health Care Leadership Model Dimension
Attend local or nationally run courses such as -	Mary Seacole here Lead and be Lead course – (HE Wessex only)	Attending a formal programme	ALL
Finance Modules	An Introduction to Healthcare Finance – E-learning module here		Evaluating information
Writing and implementing a business case	E.g. bid to purchase a new piece of equipment with consideration of the various funding avenues, such as NHS funding or charitable funding		
Mentoring- mentor ST1/2	Develop mentoring skills here		Leading with care
Developing Leadership skills	Read- Faculty of Medical Leadership and Management (FMLM) leadership and management standards – here Introverted Leaders Toolkit here Watch and reflect Susan Cain- The power of Introverts TED talk - here Compassionate Leadership read- Kings Fund here	Facilitated discussion with peers or ES	
Undertake roles such as;	Available via		Developing capability

<ul style="list-style-type: none"> • Educational fellow • Trainee rep for specialty / school • HEE TV Trainee Advisory Committee member • Join a simulation or human factors faculty. 	<ul style="list-style-type: none"> • Royal Colleagues • Local Educational Supervisors • Faculty of Medical Leadership and Management 		
<p>Manage a project</p>	<p>Undertake the PRINCE2 foundation course Free project management course here</p>		
<p>Develop Risk Management Knowledge and Skills</p>	<p>Providing evidence of attendance and contribution to clinical governance meetings.</p> <p>Investigating an incident; learning about root cause analysis - trainees can spend time with senior colleagues working through the process of how a serious incident (SI) is investigated, using real examples and how a timeline of events is constructed, and root cause analysis is performed to discover why an incident has occurred.</p> <p>Drawing up and receiving the departmental risk register</p> <p>Designing and implementing a project to reduce risk</p>		

	<p>Designing and implementing an induction programme</p> <p>Contact the local clinical audit team for information on workshops and resources.</p>		
Locally run Trust/ CCG leadership and management courses	<p>Contact your learning and development department</p> <p>Training hub / clinical education provider network (CEPN) here</p>		ALL
Undertake a Healthcare Leadership Model 360 feedback	Here	Feedback with a facilitator and then discussion with Educational or clinical supervisor.	ALL
Shadowing and buddying leaders and managers	Trust / CCG Medical Director- CEO- Nursing Director		Sharing the vision
Working in and leading Teams	<p>Watch, reflect and discuss-</p> <p>Building a psychologically safe workplace: Amy Edmondson here</p> <p>Teamwork and Leadership-</p> <p>Build a tower, build a team-</p> <p>Tom Wujes , The Marshmallow Challenge here</p> <p>Baba Shiv - give up the driving seat here</p> <p>Innovation- <i>Got a meeting? -Take a walk</i>” Nilofer Merchant here</p>		Engaging the team Holding to account Sharing the vision Inspiring shared purpose
Develop Coaching skills	<p>Attend a locally run coaching skills course</p> <p>Read- Coaching for Performance by John Whitmore</p> <p>Coaching and Action Learning here</p>		Developing capability

Receive Coaching and mentoring	Via local leadership academies here		Developing capability
Q initiative- Health Foundation	http://www.health.org.uk/programmes/the-q-initiative		Inspiring shared purpose
Time management	Business balls here and here		Developing capability

Tier 3- Advanced (ST5,6,7)

Suggested Activity	Educational resources / support available	How this could be facilitated	Health Care Leadership Model Dimension
Lead a leadership/ QI project	As previously plus essentials toolkit here		Inspiring shared purpose
Introducing a new medical guideline	<p>This project involves presenting how practice will change in the department, education departmental staff about the change, and monitoring any change to practice. Discussion focuses on the difficulties in introducing changes to current practice and how to solve the problems that arise.</p> <p><i>Or</i></p> <p><i>Introducing a new piece of equipment</i></p>		
Developing a new service	More complex project management skills can be developed if a trainee is part of a team introducing a new service. Planning, team work, overcoming obstacles, resilience and completer-finisher skills are developed in this scenario.		
Attend Trust/ CCG business meetings Shadowing senior systems leaders/ managers	Link with the local Trust Learning and Development Department, Director of Medical Education, Educational supervisors Trust / CCG Medical Director- CEO- Nursing Director STP Leaders- Social Care- Voluntary Sector	Via local organisations leadership and Od leads.	Inspiring shared purpose

Elizabeth Garret Anderson Leadership Programme	Via the National Leadership academy here		ALL
Receive Coaching	Via local leadership academies here		ALL
Managing Others	Dealing with difficult doctors BMJ module- here		

Tier 4 Post CCT- Consultant/ GP

Suggested Activity	Educational resources / support available	How this could be facilitated	Health Care Leadership Model Dimension
Undertake a formal Leadership Programme-/ Course/ Degree	Royal Colleagues / Universities National Leadership Academy- Nye Bevan here Clinical Executive Fast Track Programme here Health and Care Leaders scheme here Future Clinical Commissioning Leaders here General Practice Improvement Leaders Programme here		ALL
Receive coaching/ train as a coach	Via local leadership academies here		Developing capability
Virtual Academy of Large Scale Change masterclasses	Virtual Academy of Large Scale Change masterclasses Here		Inspiring shared purpose
Join a leadership community	In primary care NHS Collaborate here National Primary Care Improvement Community here		Inspiring shared purpose
RCGP First 5 Groups/ LMC organised meetings	http://www.rcgp.org.uk/ Via Local Medical Committees		Inspiring shared purpose
Holding Talent Management Conversations	Via the local Leadership academies		ALL

Out of Scheme activities

Suggested Activity	Educational resources / support available	How this could be facilitated	Health Care Leadership Model Dimension
Fellowships	<p>Trusts and HEE offer Medical Education Fellowships to Doctors in Postgraduate Training at various points of the year which can be taken as a mix of training and OOP or OOP only. These are advertised on NHS jobs throughout the year as available.</p> <p>National Medical Directors Clinical Fellowship Scheme here</p>		ALL

Educational Supervisor/ Trainee Discussion

Three questions that can be used to facilitate discussions

- Tell me about how your behaviour has developed with leadership in mind?
- What have you observed and learned from others in respect of leadership behaviours?
- What have people told you about your leadership behaviours - includes feedback from individuals and multisource feedback?

Leadership Worksheets

As discussed above, alongside this toolkit has been developed work sheets for trainees and educational supervisors to use. Based on the domains of the MLCF the worksheet are excellent tools to prompt learning. The work sheets can be found

Reflective Log Template

The template on the next page allows space for the trainee to log a short summary and reflection of their activities in meeting the domains they chose over the course of each year.

Leadership Reflective Log

Name of Trainee

Level of Training

Activity/ Intervention undertaken, or Projects completed:

Reflection:

- What? (a description of the activity)

What happened, what did I do, what did others do, What did I feel, What was I trying to achieve?, what were the results, what was good or bad about the experience

- So what? (An analysis of the event)

So what is the importance of this? So what more do I need to know about this?, so what have I learned about this?, so what does this really mean for me

- Now What? (Proposes a way forwards following the event)

Now what could I do?, Now what should I do?, Now what would be the best thing to do? , Now what will I do differently next time?

Taking it further

The toolkit provides a framework for development of management and leadership skills within the day to day job of a doctor in postgraduate training. Beyond this there are opportunities for out of programme years and formal qualifications should a trainee wish to take the domain further

Useful Resources	
i)	<p>Source: Faculty of Medical Leadership and Management</p> <p>Description: The Faculty of Medical Leadership and Management (FMLM), established in 2011 by all the UK medical royal colleges and faculties and endorsed by the Academy of Medical Royal Colleges, is the UK professional home for medical leadership. Our primary objective is to raise the standard of patient care by improving medical leadership. They have courses, qualifications and fellowships on offer.</p> <p>Link: https://www.fmlm.ac.uk/</p>
ii)	<p>Source: Darzi Fellowships</p> <p>Description: The Darzi Fellowship Programme is a prestigious, high profile initiative that has been shown to have a profound impact not only on participants, but also on their employing organisation.</p> <p>Link: http://www.londonleadershipacademy.nhs.uk/</p>
iii)	<p>Source: NHS Leadership academy</p> <p>Description: The Edward Jenner programme is your first port of call if you're looking to build a strong foundation of leadership skills that can help enhance your confidence and competence in your role. This is a free online course open to all healthcare professionals</p> <p>Link: https://www.leadershipacademy.nhs.uk/programmes/the-edward-jenner-programme/</p>
iiii)	<p>Source: Medical Education Fellows</p> <p>Description: Trusts and HEE offer Medical Education Fellowships to Doctors in Postgraduate Training at various points of the year which can be taken as a mix of training and OOP or OOP only. These are advertised on NHS jobs throughout the year as available.</p> <p>Link: https://www.jobs.nhs.uk/</p>

References

West M et al (2015) . The Evidence Base. Leadership and Leadership Development in Healthcare

https://www.kingsfund.org.uk/sites/default/files/field/field_publication_file/leadership-leadership-development-health-care-feb-2015.pdf