LEADING FOR HEALTH | Inside Health Inside London

WHAT DEVELOPMENT INTERVENTION?

A SHORT GUIDE FOR SENIOR MANAGERS AND LEADERS TO IDENTIFY THE RIGHT DEVELOPMENT INTERVENTION

NHS London

CONTENTS

INTRODUCTION

Leading for Health, NHS London's leadership development unit, is committed to supporting the development of talented individuals across London, ensuring that the capital has a community of high quality NHS leaders to deliver services and care to the people of London.

Leading for Health commissions and provides a number of excellent development programmes, all of which are underpinned by precise diagnosis of needs, expert design and expert delivery. Additionally, Leading for Health recognises the importance and value of building organisational self-sufficiency in development activities; hence, the creation of this guide, as a resource to inform learning and development decisions.

This guide is neither definitive, nor exhaustive – it is NHS London's perspective, designed to provide a common understanding of good practice in individual development for senior managers and leaders. It is intended primarily for an NHS audience, for use across London, although the interventions are generic and therefore applicable more widely.

It should be emphasised that many of the interventions included in this guide are sophisticated and powerful tools; this guide provides a high-level overview, sufficient to guide initial development choices, but it should be supplemented with deeper, additional research, prior to embarking on a development intervention.

AIMS OF THIS GUIDE

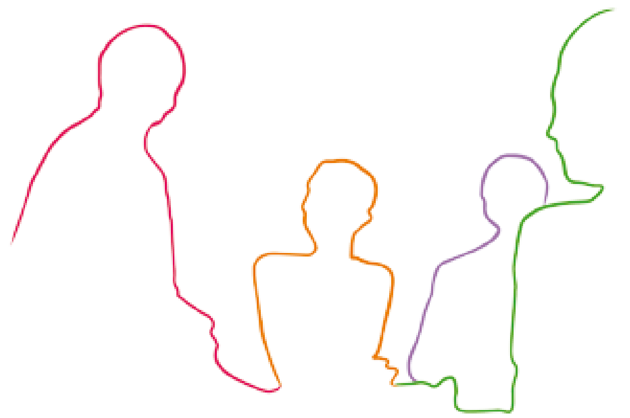
This guide is designed to support line managers and employees in making decisions regarding appropriate and useful leadership and senior management development interventions.

The primary aim is to provide sufficient information about a number of widely recognised interventions, such that informed choices may be made when seeking to address identified development needs, or to nurture recognised talents and strengths. (It should be noted that this guide is a set of possible options, rather than a list of available/funded opportunities).

This guide is intended to be straightforward and practical, providing an easy-to-use resource that will enable confident and constructive development action to be taken.

The guide is in two parts:

1. **What Development Intervention?** – a compilation of leadership development interventions, detailing each intervention, its key characteristics, when to use it, typical duration, tips and possible pitfalls, and suggestions for particularly useful combinations of interventions.
2. **Development Interventions** – Quick Check – a summary document that provides a brief description of each intervention, and a matrix for assurance that the right development intervention is being chosen.

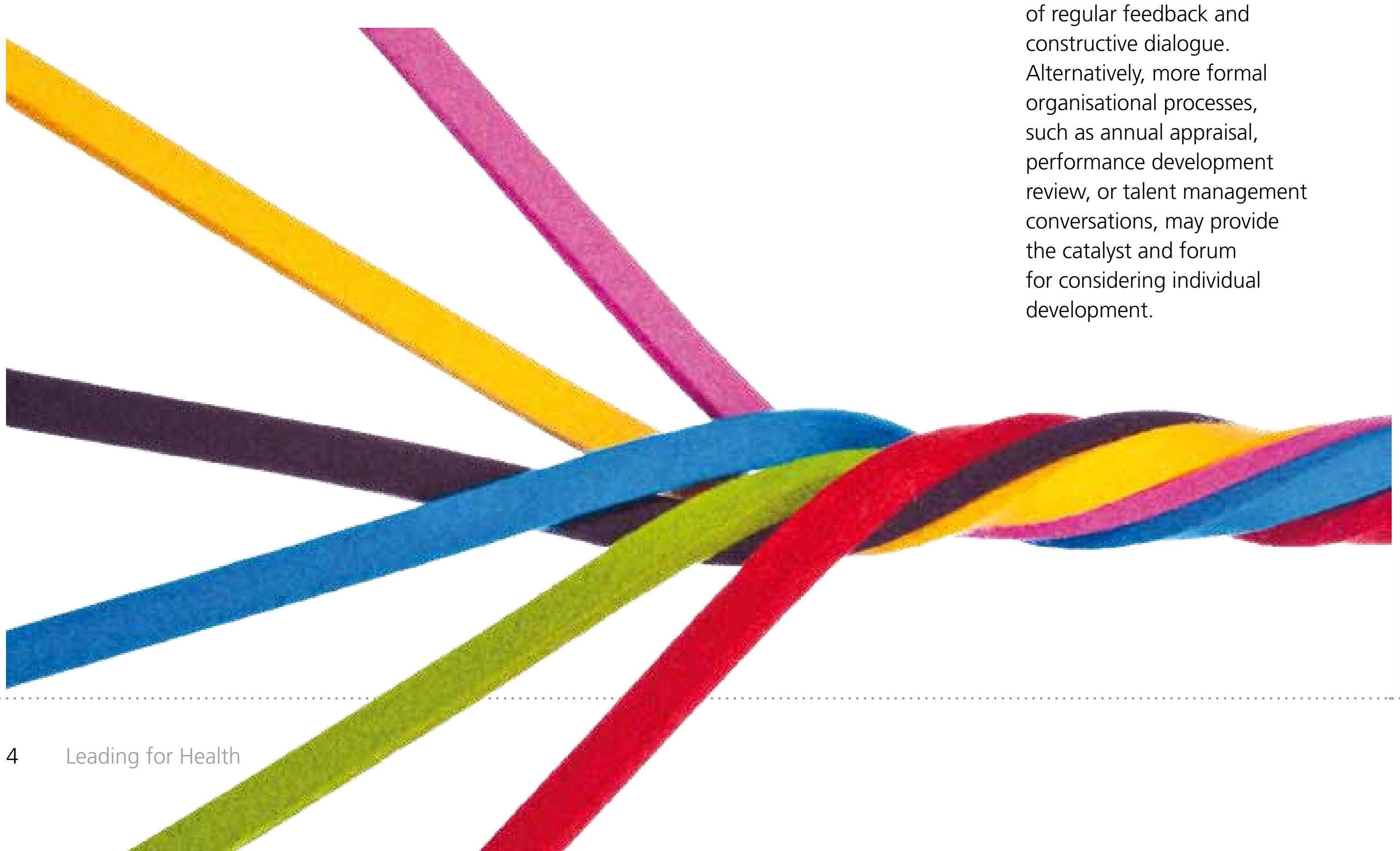


TARGET AUDIENCE

Line managers and individuals who wish to explore and identify relevant senior manager and leadership development options are likely to benefit from this guide.

WHEN TO USE

This guide will be helpful whenever attention is focussed on developing individuals, whether addressing development needs, or, tapping into potential strengths and talents. The impetus to seek development may occur at any point, particularly if line managers and employees operate within a culture of regular feedback and constructive dialogue. Alternatively, more formal organisational processes, such as annual appraisal, performance development review, or talent management conversations, may provide the catalyst and forum for considering individual development.



DEVELOPMENT NEEDS OF AN INDIVIDUAL

For the purposes of this guide, potential development needs have been divided into four broad categories >

	DEFINITION	EXAMPLES
Technical/ functional expertise	Domain-specific knowledge	Financial management Strategy Health and safety Commissioning Human resource management
Skills	Behaviourally and/or practically based competence	Team-building Managing diversity Strategic planning Public speaking
Interpersonal	Social and relationship competence	Building and maintaining relationships Verbal and non-verbal communication Influencing skills Motivating others Conflict resolution
Intrapersonal	Internal, personal attributes and traits	Personality Cognitive ability Resilience Emotional intelligence Motivation Values

INDIVIDUAL DIFFERENCES

Individual differences are likely to impact the success, or not, of a development intervention. Some factors worthy of consideration are:

Personality

Some facets of personality that may affect learning and development outcomes include:

- Conscientiousness – to what extent will an individual apply themselves to development?
- Introversion/extraversion – how will an individual respond to different types of intervention, depending on their preferences?
- Resilience – exactly how far might an individual be stretched and exposed to challenging assignments?

Learning orientation

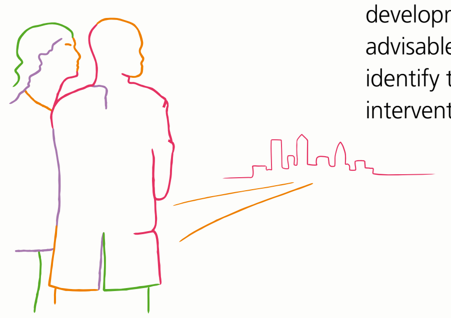
- Preferred learning styles – what is an individual's preference for learning (e.g. Honey and Mumford's [1986] model including Activitist, Reflector, Theorist or Pragmatist), has this preference altered over time, and how might the context affect the preference?
- Learning strategies and skills – what repertoire of learning 'tools' does an individual have at his/her disposal, and how experienced is he/she at deploying these tools?

Motivation

- Desire to learn – is the individual generally inclined to pursue learning opportunities with passion and enthusiasm?
- Expectations – will the learning and development intervention meet the expectations of the individual, and thereby increase commitment and effort?

HOW TO USE THIS GUIDE

In order to maximise the benefits to be gained from development activities, there are several factors that may be taken into account when embarking on a new learning initiative, regardless of the specific activity.



Responsibility

Responsibility for identifying and embarking on a particular learning activity should be shared, usually between line manager and employee. This approach should encourage ownership, motivation and a sense of being supported on the part of the employee, all of which will underpin commitment, effort and confidence to undertake the learning activity, and should increase the benefits derived from the development activities.

Identify the most appropriate intervention/s

As the second half of this document attests, there is a plethora of learning and development activities. It is advisable to give some time to identify the most appropriate intervention for the specific development needs in question, also bearing in mind individual differences, as noted above. This guide should provide sufficient information to make informed decisions, and the Quick Check includes an assurance checklist.

Identify goals

Ensure clarity and agreement on developmental goals. The acronym SMART may be timeworn, but it remains valid and helpful:w

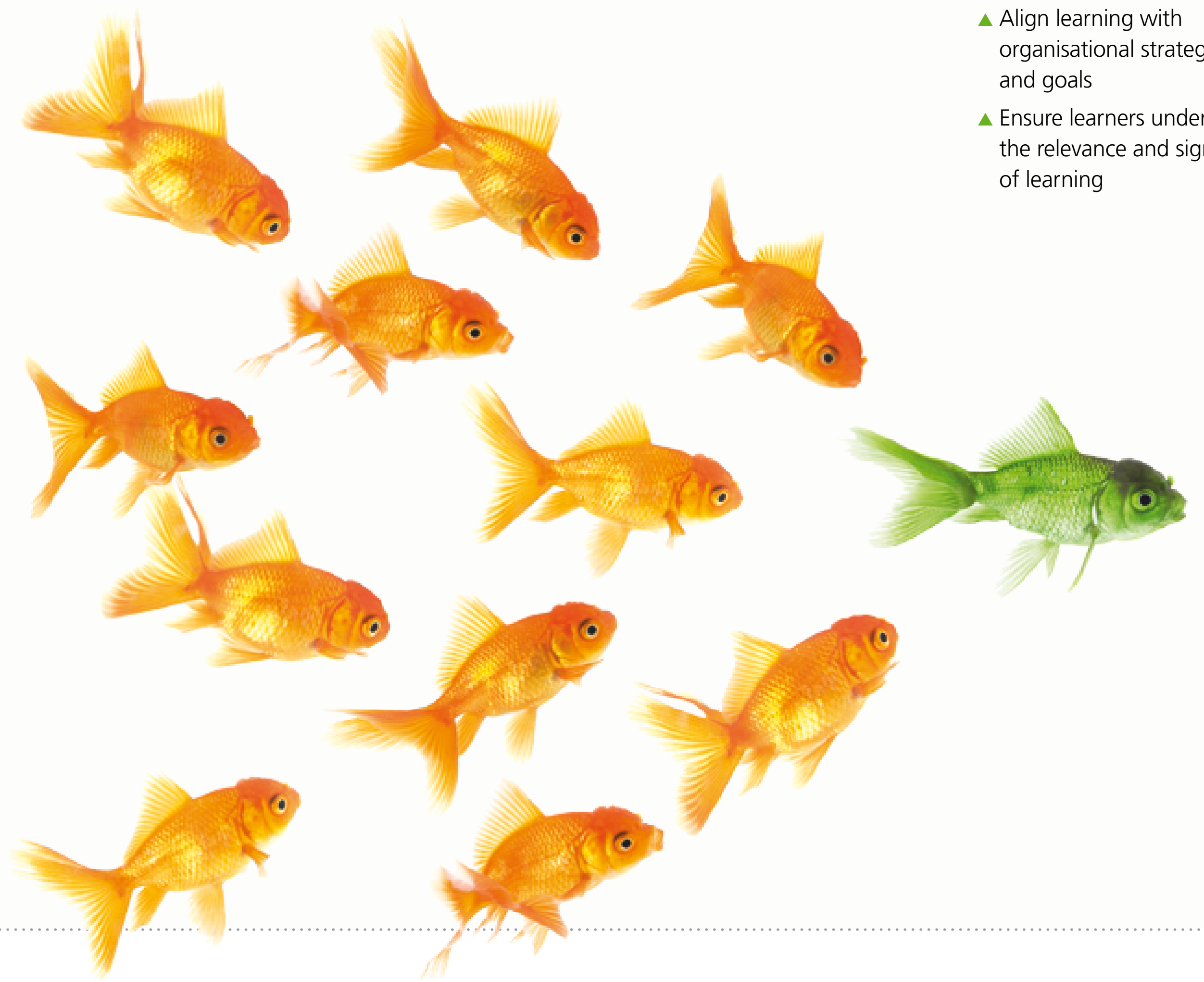
SPECIFIC
MEASURABLE
ATTAINABLE
REALISTIC
TIME-BOUND

Continuous feedback

The power and value of feedback cannot be underestimated, and all parties involved in learning activities should commit to, and respect, an agreed process of feedback. Feedback may come from various sources (e.g. line manager, colleagues, specific feedback tools etc.) At its most simple, reflection on the originally stated goals, whether these have been achieved, whether they remain valid, and what impact they have had etc., will provide a foundation framework for constructive feedback dialogues.

70-20-10: THE OPTIMUM LEARNING AND DEVELOPMENT RATIO

There is strong support for the notion, first proposed by the Center for Creative Leadership (McCall, Lombard and Morrison, 1988), that the majority of leadership development occurs through experiential, or 'on-the-job' learning. This phenomenon is known as the 70-20-10 rule – 70% of development occurs on-the-job, 20% through relationships, and 10% via formal training. This means learning and development professionals should focus on experiential learning activities, as these are likely to see significant developmental outcomes, whilst having limited, or no, impact on (frequently) limited training budgets.



Embedding learning

A perennial challenge in learning and development is to maximise the transfer of learning, from the development activity into the workplace, and to create enduring change in the learner. There are a number of factors that may influence transfer of learning (Holton, 1996) >

FACTORS INFLUENCING TRANSFER OF LEARNING

Individual differences	Personal characteristics (e.g. conscientiousness), attitudes to work, readiness to learn
Motivation	Perceived utility of training/development activity, personal motivation to learn
Environmental elements	Supervisor and peer support, feedback and sanctions
Enabling elements	Individual ability and capacity, specific transfer design, and linkages to organisational goals

There are a number of mechanisms that managers and leaders are in a position to influence, that may support the transfer and embedding of learning (Carmichael, 2011):

- Align learning with organisational strategy and goals
- Ensure learners understand the relevance and significance of learning
- Follow development with action-oriented planning
- Make learning as much a part of work as possible
- Manage the performance of learners to apply learning
- Provide ongoing manager support for the learner
- Provide peer support mechanisms
- Encourage a learning culture

Review and evaluate

A frequently raised question mark regarding the success and value of development interventions is the lack of evaluation of their effectiveness.

Whilst full-scale, formal evaluation may not be viable, benefit will be gained from simply allocating some time for reflection on the development activities, to identify what worked, what didn't work, what could be different, and precisely what learning has occurred.

As a minimum, this post-intervention critical review may be a useful process, to embed and reinforce the learning and development.

It is also useful to aim for review milestones through the lifespan of the intervention, the precise number being determined by the length of the intervention.

Interventions are presented in alphabetical order.

Each intervention includes a flag to describe the main type of learning activity, based on the 70-20-10 learning and development ratio (Experiential, Relational, Formal, or Mixed).

Each intervention also includes a flag to signify the main type of development that the learning activity is likely to provide (Technical/functional expertise, Skills, Interpersonal, and/or Intrapersonal).

Many of these interventions may be undertaken in conjunction with one or more others, either prior, during, or post intervention. Where there is a clear and specific benefit to be derived from combining different interventions, this is noted.

ACTION LEARNING

EXPERIENTIAL

Technical/functional expertise
Skills
Interpersonal
Intrapersonal

DESCRIPTION	Action learning is a collaborative learning activity, involving a set of participants who use membership of an action learning set to reflect, learn, develop, experiment and quite simply 'take action' in order address identified challenges. Responsibility for taking action sits firmly with each member, whilst the group brings peer experience and wisdom to provide insight and fresh thinking. "Action learning sets are the means by which set members work out and pursue their own actions in the workplace and learn from that experience through the process of review, reflection and planning ahead" (Edmonstone, J, 2011).
KEY CHARACTERISTICS	Action learning sets have several underlying principles: ▲ Equality of members – no member is a 'leader' or 'expert', and no member should feel out of their depth ▲ The focus of the work is on real and significant problems ▲ The level of challenge for members is similar ▲ There is sufficient diversity to bring breadth of insight, whilst ensuring some sense of shared identity ▲ Members have a strong commitment to being part of the learning set A set requires a minimum of 6–8 individuals; up to 12 could be included, allowing for potential non-attendance. Membership may be within or across, function, organisation, industry or nation. The set is likely to benefit from the participation of a skilled facilitator, although a group may evolve to self-facilitate. Given the advent of stable technology platforms, virtual learning sets are also possible, enabling successful learning across geographic distances. NB: There are a number of variations on the theme of action learning, including action learning research – these are beyond the scope of this document.
WHEN TO USE	Some examples of development needs that action learning sets may support: ▲ Management of a complex project involving tasks new to the individual ▲ Leading a challenging change agenda ▲ Projects that involve cross-organisational, cross-functional or cross-industry collaboration
DURATION	On average, a set will run over a 12–15 month timeframe, with a minimum duration of six months, usually meeting regularly on a 4–6 week cycle.
TIPS/PITFALLS	Skillful questioning technique is an essential component of action learning sets that all participants should possess, or aim to develop. It enables the exploration of issues, identification of assumptions and barriers, and fosters the creation of possible solutions. Participants should demonstrate helpful attitudes and behaviours, including openness, empathy, active listening, and non-judgemental thinking. A balance of support and challenge from participants should underpin activities, and the ratio of both may shift as the set evolves. Action learning should foster dialogue, rather than debate; dialogue is more likely to encourage consideration and respect for different contributions. There is the possibility of participants becoming 'complacently comfortable', with an associated decrease in appropriate activities – alert facilitation should recognise and avert this potentially unhelpful shift in group dynamics.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Action learning may work well alongside: ▲ Coaching ▲ Development programme ▲ Mentoring ▲ Shadowing ▲ Stretch assignment

COACHING

RELATIONAL	Skills Interpersonal Intrapersonal

DESCRIPTION	Coaching may be described as 'the process of unlocking a person's potential to maximise performance. It is helping them to learn, rather than teaching them' (Whitmore, 1992). It involves a series of learning dialogues between coach and coachee that enables the coachee to address an identified challenge, find a potential solution, or set of solutions, and implement accordingly. Successful coaching will see a sustainable positive change in the coachee, psychologically, cognitively and/or behaviourally.
KEY CHARACTERISTICS	This intervention typically, although not exclusively, requires the facilitation of an experienced coach, one who is able to empower the coachee, through skilled questioning and support, to develop their own insight and solutions to the presenting challenge. A coach does not tell or teach; the skilled coach steers the coachee to find their own learning, understanding and motivation to overcome challenges, and maximise performance. Coaching may also take the form of peer-to-peer coaching; this involves individuals, who are not necessarily qualified coaches, using a coaching approach to support and challenge each other. Coaching may also be beneficial to support team development. This is likely to involve the coach working both with the team as a whole, as well as the constituent members on an individual basis.
WHEN TO USE	Some examples of development needs that may benefit from coaching:- ▲ Low self-confidence ▲ Role transition ▲ Building personal resilience ▲ Improving work-life balance ▲ Performance optimisation Coaching is also an excellent vehicle for maximising strengths.
DURATION	A formal coaching programme is often 6–8 sessions, of approximately 1.5 hours duration. Frequency may vary, but on average is likely to be once a month
TIPS/PITFALLS	The coaching relationship is as important as the activity itself; aim to ensure a good fit between coach and coachee. Coaches may have a particular specialisation, e.g. performance coaching, team coaching, executive coaching – identify the right coach for the development need. Coaching is not a substitute for counselling; ensure that the focus and anticipated outcomes of the coaching are appropriate for this type of intervention. Agree a coaching contract at the outset of the intervention; this may be simply between the coach and coachee, or a tri-partite agreement that includes the line manager or relevant organisation representative.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Coaching may work well alongside: ▲ Action learning ▲ Communities of practice ▲ Development programme ▲ Secondment ▲ Shadowing ▲ Stretch assignment ▲ 360 degree feedback

COMMUNITIES OF PRACTICE

RELATIONAL	Technical/functional expertise Skills Interpersonal Intrapersonal

DESCRIPTION	Communities of practice may be described as a group of people who "engage in a process of collective learning in a shared domain of human endeavour… who share a concern or a passion for something they do and learn how to do it better as they interact regularly" (Wenger, 2011).
KEY CHARACTERISTICS	A community of practice should possess the following characteristics: ▲ A shared domain of interest – this provides group identity ▲ A sense of community – this manifests itself as sharing knowledge and ideas, helping others, actively engaging in joint activities and discussion, and learning together ▲ Practice – members are active practitioners, who develop a shared repertoire of resources, whether these be expertise, experience, tools, methodologies ▲ Expertise – membership is dependent upon expert participation and contribution. Beyond this, communities of practice may take various forms, in terms of member profile, group size, degree of formality, meeting 'space', frequency of meeting, lifespan etc. Some examples of the activities a community of practice may undertake: ▲ Problem solving ▲ Requesting information ▲ Mapping knowledge ▲ Re-using assets ▲ Finding beneficial synergies
WHEN TO USE	Some development challenges for which solutions may be found in a community of practice: ▲ Embarking on a new role ▲ Needing to build knowledge base ▲ Seeking creative input and inspiration ▲ Wanting to find new ideas for projects/products/services ▲ Discovering how to turn theory into practice
DURATION	A specific duration is difficult to state, as a community of practice is an open-ended activity, its lifespan being organic in nature and determined by the members.
TIPS/PITFALLS	A community of practice may be seen as a 'stewarding of knowledge'; as such, it may not be as focused on specific outcomes as an individual's development needs may require. The emphasis of the group should be clearly established, to ensure suitability. Furthermore, the organic nature of a community of practice means that it may become less beneficial and productive than originally envisaged and desired – the evolution of the group should be monitored to mitigate this potential risk. Individual members need to be motivated to share, to work collaboratively, and to operate as mature social beings.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Communities of practice may work alongside: ▲ Coaching ▲ Development programme ▲ Mentoring

DEVELOPMENT PROGRAMME

MIXED	Technical/functional expertise Skills Interpersonal Intrapersonal

DESCRIPTION	A development programme is a formalised set of activities, drawn from a range of interventions, over a set period of time, and designed to enhance managerial and leadership capabilities.
KEY CHARACTERISTICS	A development programme could include any of the interventions noted in this guide, although the following are particularly popular components: ▲ Action learning ▲ Business school style coursework ▲ Coaching ▲ Masterclasses ▲ Mentoring ▲ Observation ▲ Psychometric tools ▲ Reflective journaling ▲ Simulation ▲ Stretch assignment ▲ Training ▲ 360 degree feedback Programmes may include pure academic elements, some assessment element/s, may bestow a recognised qualification, and/or offer transferable credits to other programmes or qualifications. A good quality development programme should be built around identified developmental needs, goal setting to address those needs, and subsequent evaluation of the achievement of goals after a given time period.
WHEN TO USE	Individuals identified as possessing leadership potential and ambition and strong learning orientation are likely to benefit from this approach. In addition, given the huge variety of available programmes, there are a range of other suitable applications, depending on the individual's specific needs.
DURATION	Duration will vary, but is likely to be a minimum of 3 months, up to 2 years, depending on the specific programme (which may be a standalone, bespoke offering, or modular in format from one or more providers)
TIPS/PITFALLS	Given that the most productive form of leadership development is typically via experiential learning, a beneficial development programme should include a high percentage of this type of approach.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	This should be self-explanatory, given that a programme is likely to be a combination of development interventions.

INFORMAL LEARNING OPPORTUNITIES

MIXED	Technical/functional expertise Skills Interpersonal Intrapersonal

DESCRIPTION	This label is given to a wide range of activities that are less structured, focused and formal in nature, but nonetheless, present potential learning opportunities.
KEY CHARACTERISTICS	Some examples of informal learning opportunities: ▲ Job rotation ▲ Conferences ▲ Seminars and webinars ▲ Membership of professional body – usually involves continuous professional development requirements ▲ Additional job responsibilities – a mini 'stretch assignment' ▲ Sabbatical/career break – opportunity to reflect, evaluate, refresh, dream
WHEN TO USE	By its very nature, engaging in this type of activity will be comparatively spontaneous, but individuals can be encouraged to consider which of these activities may be beneficial to their personal development, and to take action accordingly.
DURATION	Varied
TIPS/PITFALLS	In order to maximise the effectiveness of informal learning, individuals should be encouraged to assess the learning experience, to make conscious efforts to engage with the new material.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	These activities have the potential to inter-weave with any of the other interventions noted.

MASTERCLASSES

FORMAL	Technical/functional expertise Skills Interpersonal

DESCRIPTION	A masterclass may be described as a class given on a particular topic by a renowned expert or specialist in that topic, usually to an informed audience.
KEY CHARACTERISTICS	The purpose of a masterclass is to share expertise, in order to develop excellence of understanding in the audience, on the given topic. This implies that the audience will have some existing foundation of knowledge and understanding, when engaging with the masterclass. A successful masterclass is also likely to be inspirational, if the tutor is truly a world-class expert, and an engaging speaker.
WHEN TO USE	A masterclass may be useful when an individual needs to develop expertise in a very specific and discrete knowledge realm, or if they wish to expand their thinking to consider previously unexplored topics. Examples may be: ▲ Leading change ▲ Clinical leadership ▲ Emotional intelligence
DURATION	A typical masterclass is likely to be several hours duration. A masterclass may be one in a series of related masterclasses, running over a number of weeks, or months.
TIPS/PITFALLS	With any 'teacher/pupil' type intervention, the challenge lies in transferring and embedding the learning into the workplace. Post-event reflection, and identifying specific ways of introducing the learning into the workplace, may increase learning transfer.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Masterclasses may be a useful activity in conjunction with a range of development interventions, depending on the specific topic being addressed.

MENTORING

RELATIONAL	Technical/functional expertise Interpersonal Intrapersonal

DESCRIPTION	Mentoring may be described as "a partnership between two people with different levels of experience. A mentor provides support and development, tackling issues and blockages identified by the mentee" (Clutterbuck, 2011). The mentoring relationship is usually outside of the managerial reporting line, and is based on trust, collaboration and a learning dialogue between the mentor and mentee.
KEY CHARACTERISTICS	This intervention provides a confidential and safe environment for the mentee to explore challenges, ideas and aspirations. The skilled mentor will facilitate the mentee's learning, rather than directing or advising, and thus builds self-reliance and confidence. The mentor may be described as a "sounding board", someone who provides fresh insights and an alternative perspective. The mentor may simply be a 'listening ear', enabling the re-defining of personal challenges or issues, in order to shift gear and accelerate personal growth and development.
WHEN TO USE	Some examples of development needs that may benefit from mentoring: ▲ Personal network expansion, potentially across organisations, industry sectors, and hierarchies e.g. SHA/DoH ▲ Building knowledge of other operations, e.g. primary care/foundation trust ▲ Gaining insight into the challenges of other roles, e.g. operations manager/clinician ▲ Gaining clarity regarding sense of purpose and direction, e.g. clinician considering broader leadership role
DURATION	Typical duration is one year, although this may be some months shorter or longer.
TIPS/PITFALLS	Mentoring is a two-way relationship; both the mentee and the mentor are likely to benefit from the alliance. Mentors may be senior, peer, or junior to the mentee – any combination may be successful. Attention should be given to finding the right fit between mentor and mentee in terms of personality, experience, expectations and commitment. Mentors may have a particular emphasis to their work, e.g. female leaders, clinical leaders, minority groups, talent – seek to match mentor and mentee appropriately.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Mentoring may work well alongside: ▲ Action learning ▲ Communities of practice ▲ Development programme ▲ Secondment ▲ Shadowing ▲ Stretch assignment ▲ 360 feedback

NETWORKING

MIXED

Technical/functional expertise
Skills
Interpersonal
Intrapersonal

DESCRIPTION	Networking is essentially the connection of a number of individuals, who have some degree of shared interest. Precise form, function, size, scope, purpose etc. may vary considerably.
KEY CHARACTERISTICS	This is a comparatively informal developmental activity, but if approached with focus and clear intent it may support the development of individuals, as well as colleagues and the wider organisation. It may be particularly useful when organisations need or wish to work in partnership, as networks may promote constructive relationships, mutual understanding, shared resources and knowledge.
WHEN TO USE	Networking may be helpful when an individual needs to: ▲ Gain visibility across different roles, functions, organisations or sectors ▲ Improve relationship skills such as engaging, influencing etc. ▲ Build understanding of previously un-encountered entities ▲ Identify possible new opportunities for self/team/unit/organisation
DURATION	Varied.
TIPS/PITFALLS	Networking is likely to be more effective if it is more formalised, with some level of organisation to manage the relationships and to maximise the benefits to members. Consideration should be given to governance, engagement, communication and evaluation, to foster a successful network.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Networking may usefully run alongside any of the interventions noted.

OBSERVATION

MIXED

Technical/functional expertise
Skills

DESCRIPTION	Observation is the process by which an individual observes another, or group of others, in order to learn from those role models. Also, the process of being observed may provide learning opportunities.
KEY CHARACTERISTICS	At one level, observation is a simple activity, but in order to develop knowledge and skills from the process, there is a need to look with focussed intent, and to identify both a relevant observation scenario, as well as a suitable role model or group of role models. Effective observation activities will consider the range of parameters that will influence what the observer 'sees', and hence what they are likely to learn from the experience: ▲ Existing knowledge and experience of the observer ▲ The observer's willingness and motivation to learn ▲ Credibility of the role model (status, expertise, reputation etc.) ▲ Stated purpose of the observation ▲ Provision of guidance – what precise elements to observe, what questions to answer, what 'lens' to apply etc.
WHEN TO USE	Possible development needs that may benefit from observation activities: ▲ Developing strategic understanding by observing board or senior team meetings ▲ Preparing for promotion, by observing a role incumbent ▲ Gaining insight into 'front line' activities, for example general management observation of a hospital ward ▲ Building understanding of cross-functional working, by observing a multi-disciplinary clinical team
DURATION	Duration could range from a few hours to several days.
TIPS/PITFALLS	Consideration should be given to how an observation opportunity is structured, and ideally guidance should be provided, to shape preparation, the actual observation, and post-observation activities and reflection. When identifying, and facilitating, an observational learning activity, a balance should be struck between stretching and enlightening the participant (by exposing him/her to new territory and levels of expertise), and daunting the participant (by exposing him/her to alien, overwhelming scenarios).
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Observation activities may work well alongside: ▲ Development programme ▲ Paired learning ▲ Secondment ▲ Simulation

PAIRED (PEER) LEARNING

RELATIONAL

Technical/functional expertise
Skills
Interpersonal

DESCRIPTION	Put simply, paired learning means working collaboratively with another individual, in order that both individuals learn and develop. It may also be known as 'buddying'. The framework within which this relationship operates may range on a continuum from relatively unstructured to a formalised, structured programme. In some instances, the relationship may extend to three or more individuals, hence the alternative label of 'Peer Learning'.
KEY CHARACTERISTICS	Typically, there is an assumed 'equality of status' between the pair, although there will be differences in terms of what each brings to the relationship, and this diversity may be the very essence of a successful pairing. (NB. Buddying may also be employed as a means of support when an individual is embarking on a new undertaking – this relationship may have less sense of equality between the pair). Frequently, paired learning is inter-disciplinary, a pertinent example being between clinicians and managers in healthcare. A facilitator may be employed, to bring support and focus to the collaborative learning. A structured programme may include informal 'conversations', work shadowing activities, shared workshops, shared project involvement, within a pre-determined design.
WHEN TO USE	This intervention may be particularly helpful when an individual needs to build understanding of other roles, functions, organisational units, or organisations.
DURATION	Duration will vary, as determined by the pair, or formal programme, but it is likely to be between 3-12 months. Frequency of meeting will also be determined by the needs of the specific pairing, but regular meetings should be the intention.
TIPS/PITFALLS	Careful thought and preparation should be given to identifying suitable pairs, to ensure a potent mix e.g. aim for sufficient compatibility versus diversity, in respect of personality, intellectual capacity, professional background, experience, knowledge etc. Continuous reflection and evaluation, through the learning journey, is likely to enhance the developmental benefits gained.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Paired learning may work well alongside: ▲ Observation ▲ Simulation ▲ Stretch assignment

PEER REVIEW

RELATIONAL

Technical/functional expertise

DESCRIPTION	Peer review has scientific roots, as a quality control process by which research is reviewed by fellow learned professionals, in order that recommendations for amendments may be made and the paper accepted, or not, for publication. Within the organisational context, peer review may be used in a slightly less formal fashion, as a means of gaining critical feedback from colleagues.
KEY CHARACTERISTICS	A number of informed colleagues, with relevant expertise, and willingness and availability to provide feedback, should form the review body. In a formal peer review context, an assessment board, or individual moderator, may also be established, to oversee and steer the process. Mutual respect, honesty, openness and support should underpin this activity.
WHEN TO USE	This is a useful intervention when an individual is keen to receive feedback on a particular piece of work from colleagues who are able to make a constructive critique. Some examples may include: ▲ Preparing a board paper for the first time ▲ Presenting to a clinical audience from a general management perspective ▲ Creating a cross-organisational pilot project
DURATION	A review should be achievable within a few weeks, but is clearly dependent on cooperation from colleagues.
TIPS/PITFALLS	Honesty should be encouraged from those conducting the review, and an individual needs to be prepared to act on the feedback, whether this is entirely palatable, or not. Careful choice of reviewer is important – those who are sufficiently expert in the subject matter, those who are willing to collaborate, and those who are able to devote sufficient time to the process should be sought.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Possible combinations can work well with a range of interventions where peer review or interaction takes place.

PSYCHOMETRIC INSTRUMENTS

FORMAL

Interpersonal
Intrapersonal

DESCRIPTION	Psychometric instruments, also known as tests, tools, inventories or questionnaires, are designed to provide accurate measurement of individual characteristics such as cognitive ability, aptitude, and various aspects of personality and emotional being.
KEY CHARACTERISTICS	A good quality psychometric instrument will be: ▲ Valid – it measures what it is intended to measure ▲ Reliable – it measures consistently over time ▲ Standardised – there is 'norm' group data for relevant comparison ▲ Unbiased – it does not discriminate in terms of race, gender, age or any other such factor ▲ Predictive – results can be used to predict future behaviour or performance The main types of psychometric instrument used in organisational contexts are: ▲ Cognitive reasoning tests These include verbal, numerical, abstract, perceptual, spatial and mechanical abilities. The most commonly used in a work setting are verbal, numerical, and abstract reasoning tests ▲ Personality questionnaires These are usually either a type instrument (identifying an individual as being a particular type), a well-known example being Myers-Briggs Type Indicator (MBTI), or a trait instrument (identifying the degree to which an individual demonstrates certain personality traits), good examples being the Occupational Personality Questionnaire (OPQ32) and the WAVE Styles Questionnaire Instruments measuring other aspects of personality include: ▲ Motivation Questionnaire – identifies what motivates an individual ▲ Hogan's Motives, Values, Preferences Inventory – reveals an individual's core values, goals and interests ▲ BarOn Emotional Quotient Inventory - measures emotional intelligence ▲ Belbin Team Roles – defines the particular ways in which individuals behave, contribute and inter-relate with others ▲ Aptitude tests These focus on an individual's potential capability in a specific area of work performance. Some examples include: ▲ Kirton Adaption Innovation Inventory – this measures an individual's thinking style in relation to creativity, problem solving and decision making ▲ Brainstorm – this measures an individual's ability to think creatively and generate original ideas
WHEN TO USE	Psychometric instruments are helpful when an individual needs to gain deeper personal insight, and understanding of their behavioural preferences and tendencies. The range of available psychometric instruments means a breadth of individual characteristics may be assessed; they may be used to guide decisions prior to a development intervention, as well as adding richness and depth during a development intervention. Outputs from previous psychometric evaluation, whether as part of an assessment or development process, may remain valid, although most test publishers would put a lifespan of approximately 18 months on outputs.

DURATION	The time required to complete a psychometric test will vary, depending on the test. For example, a cognitive ability test may be a brief, timed, 15 minutes duration, whereas a personality questionnaire may be un-timed and take approximately one hour to complete. Duration of subsequent feedback will also vary – cognitive ability tests require less feedback time (approximately 15 minutes) whereas a more complex personality questionnaire may require up to 90 minutes feedback time.
TIPS/PITFALLS	A useful resource when considering using a psychometric instrument is the British Psychological Society's Psychological Testing Centre (PTC) which provides information and services relating to standards in tests and testing for test takers, test users, test developers and members of the public. www.psychtesting.org.uk Additionally, ensure that a psychometric tool meets good standards by reviewing the test publisher's information about the tool – any reputable publisher will provide validity, reliability, norms and adverse impact (bias) data. Given the relatively intangible nature of what psychometric tools seek to measure, and the personal nature of their emphasis, care and sensitivity are required when interpreting instrument outputs. Ideally, feedback should be delivered to the individual by a qualified practitioner, or at the very least, by a skilled facilitator.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Psychometric assessment may inform a range of other interventions; the aim is to ensure that the instrument is relevant to the needs, e.g. an individual embarking on an action learning set may find it helpful to complete an emotional intelligence, or team roles, questionnaire.

REFLECTION

MIXED — Interpersonal, Intrapersonal

DESCRIPTION	Reflection may be described as a purposeful, intellectual examination and evaluation of one's professional thinking and activities, in order to deepen understanding of self, beliefs, knowledge and experiences.
KEY CHARACTERISTICS	Learning occurs when an individual works with new 'information' (knowledge, behaviours, experiences etc.), ponders that information, recognises if and how it may challenge current thinking, and assimilates, or not, that information into existing personal mental models, behavioural patterns and work habits. The process of self-questioning and analysis encourages and supports this accumulation of beneficial new information, and associated adaptation of thinking, behaviour and performance. Two examples of how reflection might work are: ▲ Reflective journaling – this is primarily a solo activity, shaped by the individual. It may vary from being highly structured (e.g. a specific set of questions, templates for shaping thoughts, linear presentation etc.), to very loose (e.g. free-flow, mind-maps, 'post-it' note collections) ▲ Facilitated reflection – this involves questioning by another, to generate deeper understanding, to reduce un-scrutinised, and possibly unhelpful, habitual ways, and consciously identify and embed helpful and valid ways
WHEN TO USE	This activity can be encouraged at any point before, during or after a particular developmental activity; it should enhance learning and the embedding of new thinking, experiences, behaviours etc. It is worth noting that some research suggests that it is a necessary part of deep and lasting learning.
DURATION	Variable.
TIPS/PITFALLS	It may be helpful to create some structure for this activity, to foster commitment and focused application. Some suggestions include: ▲ Establish a series of questions to be considered and answered, e.g. What have I learnt? What have I discovered that changes my previous thinking? What will I definitely apply in future? How does this connect with my existing experiences? ▲ Balance critical ("what didn't go well?") with appreciative ("what was positive and successful about that?") ▲ Allocate a specific time for the activity ▲ Collaborate with a supportive colleague ▲ Identify existing information sources that may shape the reflection journey, e.g. The NHS Leadership Framework
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	This activity may be a useful accompaniment to any of the development interventions noted.

SECONDMENT

EXPERIENTIAL — Technical/functional expertise, Skills, Interpersonal

DESCRIPTION	Secondment may be described as the temporary deployment of an individual to another part of the organisation (internal secondment), or to another organisation (external secondment).
KEY CHARACTERISTICS	Every secondment is likely to vary in nature, and should be a reflection of the needs of the host organisation plus the secondee's offering, and his/her developmental objectives. A secondment should be carefully designed to maximise the developmental opportunity for the secondee, and to ensure the secondee builds a new repertoire of knowledge, skills and capabilities that they may take back to their substantive role.
WHEN TO USE	Secondment may be particularly useful when: ▲ An individual with clear potential for a more senior role needs the opportunity to develop that potential into tangible experience ▲ An individual needs exposure to a different organisational context, e.g. primary care into acute ▲ An individual wishes to build understanding of another sector, e.g. public sector into private ▲ An individual needs to develop broad strategic capabilities, e.g. foundation to Department of Health
DURATION	This may range from approximately three months to two years, and may be part-time or full-time.
TIPS/PITFALLS	All parties involved in a secondment need to agree expectations, responsibilities, performance objectives etc., in addition to the practical and administrative aspects of the assignment. A discrete piece of work, with a tightly defined scope and timescale, is likely to be an easier secondment to manage. Wider organisational benefits to be won from an external secondment, such as strengthened relationships and improved cross-organisational understanding, should be leveraged, to maximise the value derived from the secondment.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Secondment may work well alongside: ▲ Coaching ▲ Mentoring ▲ Observation ▲ Simulation

SHADOWING

RELATIONAL

Technical/functional expertise
Skills
Interpersonal

DESCRIPTION	Shadowing involves an individual working alongside a colleague, in order to gain first-hand experience of that colleague's role, how it functions and how that colleague fulfils that role. This activity may cross functions, departments, organisations, industries or sectors.
KEY CHARACTERISTICS	The precise format of a shadowing activity will vary, depending on the needs and context, and whether an organisation has a formalised approach to shadowing, or not. This intervention may be similar to observation, and as such, similar preparation will be helpful i.e. establish the focus of the activity, identify a suitable role for observation, and a suitable incumbent in that role.
WHEN TO USE	Shadowing may be a useful intervention in the following circumstances: ▲ Exploring alternative career pathways ▲ Contemplating a promotion and seeking to understand the potential new role more fully ▲ Wanting to improve personal performance and efficiency by shadowing a similar role
DURATION	Duration may be as brief as half a day, up to several (not necessarily consecutive) days.
TIPS/PITFALLS	Respectful collaboration and clarity of expectations will provide a firm foundation for successful shadowing. Both parties should have a clear understanding of what they may gain from the experience, and how they should engage with the activity.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Shadowing may work well alongside: ▲ Action Learning ▲ Coaching ▲ Mentoring

SIMULATION

FORMAL

Technical/functional expertise
Skills

DESCRIPTION	Simulation is an interactive learning activity designed to place a team (usually) of participants in an artificially created work scenario, and present task challenges, decision requirements and associated consequences to be addressed by the participants.
KEY CHARACTERISTICS	The precise form of a simulation will vary depending on topic and delivery format. Possible topics might be: ▲ Project management ▲ Functional management ▲ Strategic leadership ▲ Leading change ▲ Process simulation ▲ Clinical simulation Delivery format may vary from relatively simple to highly sophisticated, including computer-based, virtual reality simulations.
WHEN TO USE	This type of intervention is likely to be helpful in: ▲ Applying theory to practice ▲ Experiencing risk-taking that may not be acceptable in the actual workplace ▲ Discovering how to manage group dynamics ▲ Developing decision making and problem solving skills
DURATION	This will vary depending on the particular simulation, but may range from a few hours to several days.
TIPS/PITFALLS	Research (*Adobar and Daneshfar, 2006*) shows that a number of factors will affect the learning impact of a management simulation. There needs to be: ▲ Suitable realism ▲ Ease of use ▲ Sufficient complexity, but clear links between decisions and outcomes ▲ Positive team dynamics – emotional conflict within a simulation team will reduce learning ▲ Task-focussed debate and idea exchange Some individuals are more willing to engage in this type of activity, than others; skilled facilitation and effective design of the activity may increase motivation to participate.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Simulation may work well alongside: ▲ Development programme ▲ Observation ▲ Paired learning ▲ Secondment

STRETCH ASSIGNMENT

EXPERIENTIAL

Technical/functional expertise
Skills
Interpersonal
Intrapersonal

DESCRIPTION	A stretch assignment is an experience that takes an individual beyond his or her current level of experience and/or capability, exposing them to new challenges and risks. The individual is required to step out of their 'comfort zone', engage in rapid learning, and cope with the associated ambiguities of a relatively unknown realm. They should emerge more confident, competent and mature.
KEY CHARACTERISTICS	A stretch assignment may involve some, or all, of the following elements: ▲ High profile ▲ Significant responsibility ▲ Leading without direct authority ▲ Initiating challenging change ▲ Lateral influence ▲ High complexity ▲ Risk ▲ High-stake environment ▲ Building coalitions A stretch assignment needs to be carefully implemented, to ensure sufficient challenge, without overexposing the individual, or, indeed, the organisation, to unacceptable levels of risk; success in achieving this balance will provide the individual with an extremely powerful development experience, with relatively low cost to the organisation.
WHEN TO USE	An individual who has been identified as possessing leadership potential, and demonstrates a strong learning orientation, is likely to gain considerable benefit from a stretch assignment. Some examples of stretch assignments: ▲ Creation and launch of new services ▲ Major change in role/position ▲ Leading a team with considerable diversity ▲ Joining a senior board
DURATION	A stretch assignment may be several months in duration. Alternatively, a stretch opportunity may be as short as a few days, or a week (e.g. acting up).
TIPS/PITFALLS	There is a curvilinear relationship between the degree of leadership development and the degree of challenge presented by a stretch assignment i.e. there is a tipping point beyond which too much challenge reduces the amount of development. However, it should also be noted that the amount of challenge can be increased to extend the tipping point, if the individual is provided with feedback during the stretch assignment (*DeRue and Wellman, 2009*). A stretch assignment is likely to create risk, as the likelihood of error increases; such risk can and should be managed carefully, which may require up-skilling of those responsible for overseeing the assignment. Ideally, assignments should be managed methodically, across an organisation (and possibly beyond) and works best in a project management-type approach. Line managers/leaders need to understand, support and sponsor stretch assignments, in order to leverage fully the power of this approach.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	A stretch assignment may run alongside: ▲ Action learning ▲ Coaching ▲ Development programme ▲ Mentoring ▲ Paired learning ▲ Simulation ▲ 360 feedback

TRAINING

FORMAL

Technical/functional expertise
Skills
Interpersonal

DESCRIPTION	Training may be described as an organised, systematic activity designed to impart information, in order that the recipient develops specific knowledge, skills and/or attitudes.
KEY CHARACTERISTICS	A training course will have a clearly defined focus, objectives and content, and a specific methodology for delivery, all of which may vary considerably, dependent upon various factors, such as topic, audience (individuals or teams), trainee needs and style, context, trainer style and approach.
WHEN TO USE	The range of topics for which training may be found is extensive, but essentially a training course is likely to be the right development intervention when an individual has a very specific development need, usually of a knowledge and/or skills-based nature. For example: ▲ Public speaking ▲ Financial management ▲ Managing the media ▲ Health and safety
DURATION	Training programmes vary in length, ranging from a few hours to several weeks, depending on the training topic and approach.
TIPS/PITFALLS	Effectiveness of training is likely to be improved by two key factors: ▲ Ensuring practice – this should be at suitably spaced intervals, and accompanied by guidance and feedback ▲ Trainee motivation – this will be enhanced by an interesting and stimulating training course, as well as ensuring that the trainee perceives the training course to be relevant, as well as within his/her capacity to master successfully Another challenge around training is the low rate of learning transfer into the workplace. Learning transfer may be enhanced by: ▲ Provision of practice opportunities in the workplace ▲ Support for the trainee, once back in the workplace ▲ Facilitated learning in groups to reinforce the training ▲ Direct link to 'real' projects
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	Training may support a number of the interventions noted, depending upon the specific topic of the training activity.

360 DEGREE FEEDBACK

EXPERIENTIAL Interpersonal
Intrapersonal

DESCRIPTION	360 degree feedback, also known as multi-rater, multi-source, or multi-level feedback, involves information about an individual being collected from a number of sources, typically direct reports, peers and managers, but possibly including other 'stakeholders' who may be external to the organisation, such as clients. This information is collated and fed back to the individual.
KEY CHARACTERISTICS	360 feedback is implemented ideally via a specifically designed instrument (e.g. NHS Leadership Framework 360 tool), tested for reliability and validity, and supported by skilled facilitators; this is likely to improve its efficacy (although informal 360 feedback, gathered and interpreted by the individual, may also be a useful source of developmental information). Some instruments may elicit qualitative 'free text' – this can be a useful if the commentary is both high quality and constructive, although feedback should be handled with care and sensitivity. Confidentiality of raters increases the likelihood that raters will provide an honest, and therefore helpful, set of feedback responses. In order to achieve confidentiality, a minimum number of raters, per source category, will be necessary; alternatively, categories may need to be amalgamated. Feedback by a skilled individual improves the likelihood of the feedback being understood, accepted and acted upon, and reduces the potential for unwanted, negative reactions.
WHEN TO USE	360 feedback may be used to enhance understanding of development needs and thus may signpost relevant development activities. Most crucially, if it is a starting point, there should be subsequent development activity, flowing from the initial 360 process, to avoid potential frustration, disengagement and de-motivation.
DURATION	Ideally, a 360 feedback cycle should take no longer than 2 months, and may be considerably shorter with cooperation from all involved.
TIPS/PITFALLS	The effectiveness of 360 feedback is variable, and affected by a number of factors: ▲ Organisational understanding and support for 360 feedback ▲ Quality of the instrument (reliability and validity) ▲ Raters (training, relationship to individual, length of time known to individual, distance from individual etc.) ▲ Feedback mechanism Use of 360 feedback should be planned carefully, with attention to the following: ▲ Relevant purpose ▲ Management/leadership commitment ▲ Clear communication regarding purpose, process, resources and outcomes ▲ Identification of a good quality, appropriate instrument ▲ Clear process for identifying and briefing raters ▲ Sensitive feedback by skilled facilitators ▲ Available resources for subsequent development 360 feedback is a potentially very powerful and sensitive process; as such it needs to be used with care and understanding, otherwise there is the possibility of unwanted and unhelpful consequences.
POSSIBLE COMBINATION WITH OTHER INTERVENTIONS	360 feedback works well alongside: ▲ Coaching ▲ Development programme ▲ Mentoring ▲ Secondment ▲ Stretch assignment

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EVOLUTION OF THIS DOCUMENT

It is intended that this will be a living document, evolving into an interactive, web-enabled resource that will include NHS case studies, and links to related resources.

If you have any feedback, queries or suggestions, please direct these to: Leading for Health team, NHS London at leadingforhealth@london.nhs.uk

NOTES

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