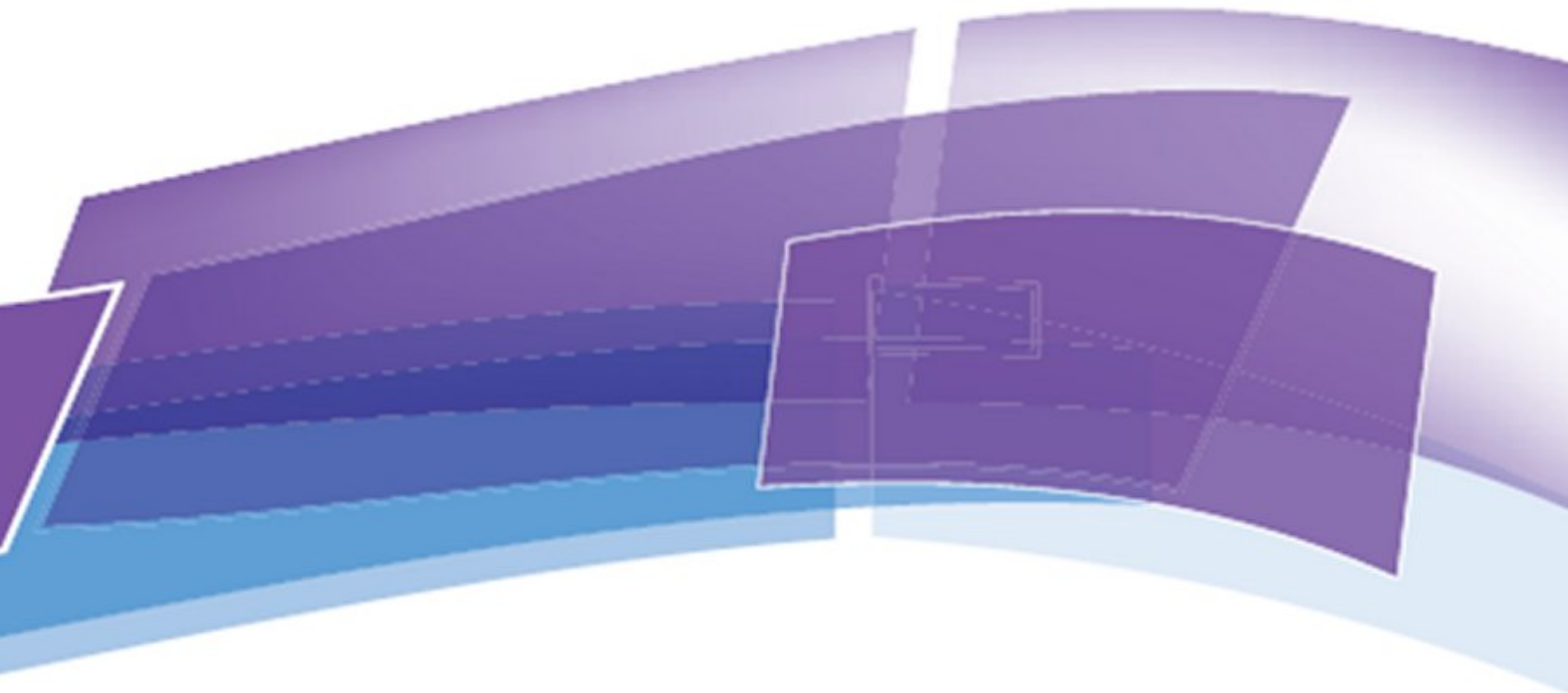


Leading Teams:

***Career Progression Pathway and Supporting Learning
and Development Framework for the role of Team
Leader***



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1.0 Introduction

1.1 The role of the Team Leader in a community setting is central to the delivery of safe, effective and timely person-centred care, evidenced through a positive patient/client experience and excellent clinical outcomes. The importance of a highly skilled and educated community workforce is well recognised by healthcare commissioners, educators, practitioners and service users. It is equally important that the pathway towards the pivotal role of Team Leader within a community setting is intentionally mapped within a career progression pathway. This should include learning and development opportunities which will prepare individuals for the leadership roles and specifically the Team Leader role of the future.

1.2 The aim of the Regional Project *Leading Teams* was to support and strengthen the role of the Team Leader working in a community setting, including processes to support succession planning for the role. Within this document the term Team Leader encompasses all nurses and midwives who lead a team of staff within a Health and Social Care (HSC) community setting. This includes:

Team Leaders, on the live Nursing and Midwifery Council register, working in a community setting who are responsible for managing one or more of the following professional groups/teams:

- Health Visitors
- Community Mental Health Nurses
- District Nurses
- Community Midwives
- School Nurses
- Community Children's Nurses
- Community Learning Disability Nurses
- Community based specialist nurses (e.g. heart failure, palliative care, respiratory, dementia, crisis response, home treatment, addictions)
- A multi-professional team e.g. a community based intermediate care team

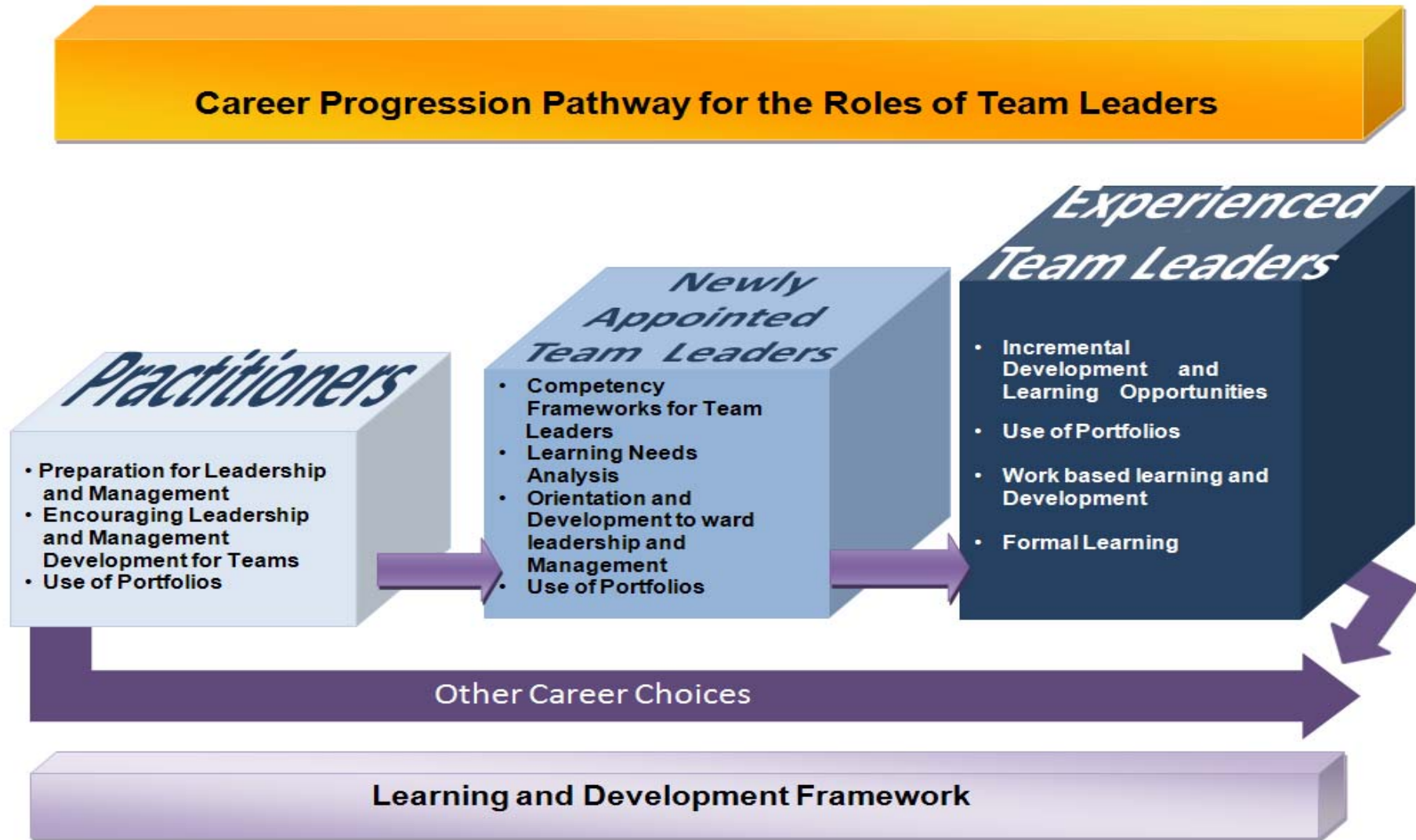
1.3 This document is the final product of work completed as part of the project to achieve objective 3 as below:

“Make recommendations about processes that regionally and within organisations support succession planning for the Team Leader role”.

2.0 Purpose

- 2.1 The recommendations contained within this document present a number of formal and informal mechanisms to support succession planning and the essential learning and development processes required for newly appointed and experienced Team Leaders within the five HSC Trusts in Northern Ireland.
- 2.2 The impact of these formal and informal mechanisms should harness the desirable leadership qualities and effective managerial skills that are essential for Team Leaders, enabling them to lead a team of nurses, midwives or multi-professional staff to practice safely and effectively in healthcare. Further information regarding *Leading Teams* can be accessed at:
http://www.nipec.hscni.net/cw_leadingteams.html
- 2.2 **Figure 1**, page 3, illustrates the model for a Regional Career Progression Pathway from practitioner to the role of Team Leader.

Figure 1: Regional Career Progression Pathway



3.0 Career Progression for the Role of Team Leader

- 3.1 **Figure 1**, page 3, illustrates the model for a Regional Career Progression Pathway from practitioner to the role of Team Leader. The model also demonstrates that there are other career choices, reflecting the fact that there may be practitioners who, having completed the preparation stage of the pathway, would not progress to apply for a Team Leader post. The Preparation Pathway for leadership and management roles, underpinned by the learning and development framework therefore includes a number of components specific to the role of the Team Leader working in a community setting, but also promotes the idea of transferrable skills across a range of career options.

1. Succession Planning for Practitioners

Development of potential Team Leaders can start during the early years of a registrant's career, following registration and completion of processes aimed at preceptorship. It is important that practitioners have the opportunity to develop those skills which are essential to effective leadership and management, in preparation for the role of Team Leader in a community setting, should they desire to progress to this role in their career. The model and recommendations presented are designed to assist the development of knowledge and skills for senior practitioners with an aptitude and a desire to apply for and undertake the role of Team Leader.

2. Newly Appointed Team Leaders

Lack of clarity about the Team Leader role and purpose in terms of management, clinical expertise, leadership and teaching, can and has had detrimental effects on their confidence and autonomy to manage their staff (RCN, 2009). The model and recommendations presented in this document are designed to develop and support the Team Leader during the first two years of appointment to gain confidence to carry out the responsibilities of the post, providing leadership and management in ensuring safe and effective patient care.

3. Experienced Team Leaders

Experienced Team Leaders equally require additional and significant breadth and depth of knowledge and skills that will consolidate the key responsibilities of their chosen career. The model and recommendations presented enable the continuous development and support of experienced Team Leaders to carry out those escalating responsibilities that are an essential requirement of their role. The application of effective leadership and management skills should ensure the ongoing delivery of safe and effective person-centred care from their staff.

4.0 Career Progression Pathway

4.1 Supporting Career Progression

Each step in the Career Progression Pathway requires engagement in a range of learning and development opportunities for the individual. In addition, there are a number of supporting elements required at a community setting, organisational and regional level. The elements identified below are essential to the effective implementation of the Career Pathway for the role of Team Leader. It is suggested that these elements are:

Community Setting:

Current Team Leaders should appropriately delegate leadership and management responsibilities to all relevant members of the community team, supported through supervision and mentoring. These activities could include, for example, stock and budgetary management; coordinating the staff roster; leading a project to improve practice; or acting up in the role of Team Leader.

In addition, current Team Leaders should support individual members of the team who demonstrate aptitude for leadership and management and where appropriate encourage participation in learning and development in relation to the role of Team Leader.

Following completion of the required learning and development to prepare for the role of Team Leader, individuals should continue to develop competencies via engagement in appropriately delegated leadership and management activities. This should include enhanced opportunities, for example, 'acting up' into the Team Leader role for defined periods of time.

Newly appointed Team Leaders should be initially supported by a robust orientation programme (NIPEC, 2012b) and identified leadership and management learning and development activities. This will require facilitation from line managers, mentors and more experienced colleagues.

A process of continuous assessment and demonstration of achievement against the KSF and Competence Assessment Tool for the role of Team Leader (NIPEC, 2012) is therefore recommended at various stages following appointment. Regular review of learning and development needs is also advocated for the newly appointed Team Leader within the first two years of appointment. **Figure 2**, page 6, outlines this approach.

Experienced Team Leaders also need continuous development and support in carrying out the escalating responsibilities of the post. The continuum of role

development should follow on from the self-assessment of competencies required using the Team Leader Competence Assessment Tool (NIPEC, 2012). Embedding these skills and knowledge escalates them to a higher level which harnesses the individual's ability to think and act more strategically in alignment with the Trust's corporate objectives and regional government policy. The Career Progression Pathway will also support individuals who demonstrate aptitude and skills for potential senior management roles.

Figure 2: Development Review Approach for Newly Appointed Team Leader



Organisational:

Each Health and Social Care Trust should consider the resourcing implications to support the effective implementation of the Career Progression Pathway for the role of Team Leader.

For example this may include time for:

- Practitioners to engage in development activities which support future opportunities to take on the role of Team Leader

- Experienced Team Leaders to mentor potential or newly appointed Team Leaders
- Individuals to participate in learning sets.

Consideration should also be given to protecting time for learning and development activities.

Regional:

It is recommended that a regional group of key stakeholders should be convened to agree and review the learning outcomes required to meet the levels of achievement outlined in pages 9 and 10. This approach will provide consistent development of learning outcomes along a Career Progression Pathway for:

- Practitioners who may plan to undertake the role of Team Leader
- Newly appointed Team Leaders
- Experienced Team Leaders

4.2 Career Progression

The model presented for career progression, supports learning at a range of developmental levels within a registrant's career. The idea of learning within competency domains over a range of levels of development is in keeping with other models of skills achievement (Benner, 1984; Eraut, 1994).

It is recommended therefore that planned learning and development from preparation, through induction following appointment, and ongoing development of Team Leaders should be based on developing a range of skills on a management and leadership continuum, likened to that of 'novice to expert' (Benner, 1984). This system could enhance the development of competence, as assessed against the Team Leader Competence Assessment Tool (NIPEC, 2012) over time.

There are three levels outlined in **Figure 3**, page 10, which describe the development of an individual from practitioner to experienced Team Leader.

Figure 3: Levels of Development



Adapted from Benner (1984)

4.3 Aims of Career Progression Pathway

To support progression from 'novice' to 'expert', (Figure 3, page 8) the pathway presented defines the required levels of achievement relating to specific leadership and management knowledge and skills.

The flexible approach outlined in the Learning and Development Framework at section 5.0, page 11, underpins and supports the model of skills achievement proposed. A practitioner may have some leadership and management skills already developed throughout their career. Through the analysis of learning needs, additional development requirements may be identified and planned for appropriately.

It is expected that a newly appointed Team Leader will be reasonably competent in a range of required leadership and management skills. Through competence assessment and planning of appropriate learning activities to meet development needs, a level of proficiency during the first two years following appointment should be achieved. This process continues through the progression of an individual along the pathway to eventually attain the level of achievement for an Experienced Team Leader.

The columns presented on this page and on page 10 outline the aims and desired levels of achievement for the Career Progression Pathway from practitioner to the role of Experienced Team Leader.

Preparation for the Team Leader

Aim: To develop the knowledge and skills of practitioners in relation to the role of Team Leader.

The registrant preparing for the role of Team Leader will develop an understanding of:

- Methods of monitoring and maintaining standards of care that ensure the provision of safe and effective person centred care by practitioners and support staff to meet the needs and experience of patients/clients and their carers in all aspects of the patient/client journey
- The impact of relevant Trust and DHSSPS policies and protocols for their area
- The principles of leadership and management for teams of practitioners and support staff
- The lines of professional and organisational accountability, performance management and staff development processes within a multidisciplinary team environment
- The principles of effective resource management within allocated budgetary constraints
- Effective risk management processes
- The elements required to provide a supportive environment that enables staff and students to demonstrate ongoing learning and development
- The underpinning principles required to develop practitioners within a multidisciplinary environment to ensure best practice and that care provided is person centred and evidence based.

Newly appointed Team Leader

Aim: To develop and support the Team Leader in the first 2 years of appointment to gain confidence in carrying out the responsibilities of the post, providing leadership and ensuring safe and effective person centred care.

The New Team Leader will be able to:

- Monitor and maintain standards of care to ensure the provision of safe and effective person centred care by practitioners and support staff to meet the needs and experience of patients/clients and their carers in all aspects of the patient/client journey
- Apply and monitor Trust and DHSSPS policies and protocols for their area
- Demonstrate skills of effective communication, leadership and management of practitioners and support staff providing clear lines of professional and organisational accountability
- Monitor and manage the performance and development of staff within the context of a multidisciplinary team
- Effectively manage resources within allocated budgetary constraints
- Implement effective risk management processes
- Enable a supportive environment that supports staff and students to demonstrate ongoing learning and development
- Develop practitioner services within a multidisciplinary environment to ensure best practice and that care provided is person centred and evidence based.

Experienced Team Leader

Aim: To continuously develop and support the experienced Team Leader in carrying out the escalating responsibilities of the post.

The Experienced Team Leader will:

- Participate in developing, implementing and monitoring standards, policies, procedures and protocols at an organisational and, where appropriate, regional level
- Represent the organisation's perspective, policies and position with external agencies, where appropriate
- Identify the need for change, leading and promoting practice/service development initiatives within the organisation.
- Ensure the development and implementation of appropriate systems to systematically capture and disseminate learning and best practice at all levels of the service
- Network with peers across professional groups within the organisation promoting the exchange of knowledge, skills and resources
- Build and maintain partnerships with a range of clinicians and managers in the planning or development of own service promoting the involvement of patients/clients and carers
- Foster a culture of evidence-based practice and continuous service improvement within the community setting to enhance the patient/client experience through person-centred care
- Interpret the broader influences and relevant power bases within the organisation and the wider community.

5.0 Learning and Development Framework

5.1 The model at **Figure 1**, page 3, presents a Career Progression Pathway that could potentially assist a practitioner to the role of Team Leader. The Career Progression Pathway is underpinned and supported by a learning and development framework. There are three broad elements for registrants within the learning and development framework supporting career progression to the role of Team Leader which include:

1. *Competence Assessment*

In advance of undertaking preparation for their role, practitioners should undertake a self-evaluation of competence through the use of an appropriate self evaluation tool such as:

- *The NHS Leadership Framework* (National Leadership Council, 2010)
 - suitable for practitioners who may plan to undertake the role of Team Leader
- A Competence Assessment Tool for Team Leaders (NIPEC, 2012)
 - suitable for newly appointed Team Leaders
 - suitable for experienced Team Leaders

The process of assessment will assist in the identification of learning and development needs and can be completed to support Knowledge and Skills Framework (KSF, 2004) Development Reviews.

2. *Flexible Individualised Learning*

There are two elements to this approach: planning and implementing. Having assessed learning and development needs, a personal development plan should be drawn up to include a blend of appropriate learning activities (for examples see **Table 1**, page 12) that meet the needs of the individual and can consist of elements of formal or informal learning and development. The personal development plan will also have a fixed period over which learning will take place, which should be agreed with the relevant line manager, mentor or supervisor.

Prior learning undertaken through formal or informal learning activities during a registrant's career journey may provide evidence that the individual is competent in a particular area and does not require any further development. Knowledge and skills acquired, for example, from other development programmes such as preparation for the role of supervisor or mentor may be demonstrated via a professional portfolio.

Having planned appropriate learning and development activities, it is important for the individual to carry out or 'implement' them within the agreed time frame.

3. Evaluation of Learning and Development

The individual should maintain a professional portfolio which demonstrates evidence of learning and competence development. In addition, an evaluation of the activity undertaken should take place. The individuals' line manager, mentor or supervisor should agree the achievement of competence and review further development needs.

The framework presented includes analysis of learning needs. For further information in relation to Learning Needs Analysis visit:

<http://www.nipec.hscni.net/pub/LNA%20Dec08.pdf>

Table 1: Examples of learning and development activities

Menu of Learning and Development Activities to support development on the Career Progression Pathway
Face-to-face learning
Mentoring
Peer supervision
Facilitated groups
Work-based learning
Job shadowing
Supervised practice
Leading a change initiative
360° assessment
E-learning
Participation in E-communities
Engaging in delegated activities

Further examples of Learning and Development Activities are available at:
www.nipecdf.org

Further information on the Learning and Development Framework which supports the Career Progression Pathway can be found at:

http://www.nipec.hscni.net/cw_leadingteams.html

6.0 Conclusion

This document presents the agreed approach for a Career Progression Pathway, as a product of the regional project *Leading Teams*, to encourage, support and continuously develop the career progression of practitioners to the role of Team Leader.

Through the continuum of this Career Progression Pathway the development of knowledge and skills will be supported, embedding the responsibilities and authorities attached to the role of Team Leader addressing the DHSSPS Chief Nursing Officer's commitment to supporting and strengthening the role.

7.0 References

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