A Framework to Support the Professional Development of Transfusion Practitioners

Kairen Coffey/Andrea Harris, NHS Blood and Transplant, June 2012
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</tbody>
</table>
Contents

Introduction .............................................................................................................................................. 4
Scoping out Development Opportunities ............................................................................................. 4
Leadership Development in the NHS ................................................................................................. 4
NHS Leadership Framework ............................................................................................................... 6
TP Development Opportunities ......................................................................................................... 7
Suggested Use of the Framework ........................................................................................................ 11
Appendix 1 – Transfusion Practitioner Workshop (overview of the day) ........................................... 12
Appendix 2 – Action Learning Sets (what are they?) ........................................................................ 14
References ........................................................................................................................................... 16
Recommended Reading ....................................................................................................................... 16
A Framework to Support the Professional Development of Transfusion Practitioners

This document has been endorsed by the Chief Medical Officers National Blood Transfusion Committee (NBTC) on 24th September 2012.

Introduction

As Healthcare Professionals, Transfusion Practitioners (TPs) are responsible for our own personal development. Through the use of Performance Appraisals and Individual Development Plans TPs must strive to provide better healthcare that is current and fit for purpose.

Continuing Professional Development (CPD) consists of any educational activity which helps to maintain, develop or increase knowledge, problem-solving, technical skills or professional performance standards all with the goal that clinicians can provide better health care. CPD includes ‘formal’ activities e.g. courses, conferences and workshops, as well as self-directed activities such as preceptorship and structured or directed reading. In this current financial climate TPs need to find ways of developing their skills in a cost effective way.

The development opportunities presented as part of this framework are largely self-directed ‘on the job’ or experiential learning and therefore available to all TPs.

Scoping out Development Opportunities

A TP workshop took place on 2 December 2011 in Birmingham (see Appendix 1 for notes). The aim of the workshop was to produce a selection of development opportunities specifically for TP’s.

The day was attended by nine TP’s (one TP was unable to attend), representing each Regional Transfusion Committee (RTC) in England.

The workshop was structured around a series of discussions that explored the leadership skills and qualities needed to be an effective TP.

Discussions were purposefully steered away from formal ‘courses’ and focused more on the leadership skills needed to fulfil the role.

This document has been written in order to provide TP’s with a framework / menu of development opportunities that focuses not only on role specific aspects of the job but also the important area of leadership development.

Leadership Development in the NHS

Great importance has been placed on developing the skills required to be an effective leader within the NHS.
Indeed Sir David Nicholson wrote:

"This is a unique period in the NHS and a time of significant change for health and care services in England, with an unprecedented level of responsibility being devolved to frontline staff. Building on our successes as we design the future requires bold and thoughtful leadership, rethinking how we work, challenging current practice and thinking outside of our own organisational and professional interests.

It will be imperative that frontline clinicians and the wider workforce have the leadership knowledge, skills and behaviours to drive radical service redesign and improvement. This will involve working in collaboration across health systems, in developing new models of care, and further developing the skills of the entire workforce. The ability to influence and manage change at the frontline will be central to delivering this. There is no doubt that we must continue to develop the leadership capability within the system. It is on this basis that the NHS Leadership Framework has been designed."

**Sir David Nicholson, NHS Chief Executive**

Effective Clinical Leadership is critical if we are to achieve an NHS that genuinely has the quality of care at its heart. Clinicians, more than any other health professional group are at the forefront of delivering care to patients.

Leadership is for the whole NHS and not just those in management roles. Clinicians with leadership skills are uniquely placed to deliver better services for patients and foster innovation.

The NHS Leadership Framework (LF) has been developed by the National Leadership Council (2012a) after extensive research and consultation with a wide cross section of staff, patients, professional bodies and academics

The NHS LF is designed to ensure that the whole workforce can have the leadership knowledge, skills and behaviours we need to improve health and care.

It provides a consistent approach to leadership development for staff in health and care irrespective of discipline, role or function, and represents the foundation of leadership behaviour throughout the NHS. It is designed to enable staff to understand their progression as leaders and to support the NHS to foster and develop talent.

It is made up of seven domains which describe leadership knowledge, skills and behaviour.
The NHS Leadership Framework

For more information go to:
http://www.leadershipacademy.nhs.uk/

See also ‘recommended reading’ section
TP Development Opportunities

The following menu of development opportunities has been split into the four key areas of TP knowledge as identified at the TP workshop:

- Leadership
- Scientific
- Medical
- Other (e.g. IT)

These have been cross referenced directly to the NHS Leadership Framework to provide clear opportunities for development. Most are self-directed experiential opportunities and NOT formal courses as it is well recognised that experiential ‘on the job’ learning accounts for up to 70% of our development (National Leadership Council 2012).

The list is not exhaustive and is intended as a starting point when looking to produce a development plan, preferably in conjunction with your line manager during your Performance Development and Appraisal Reviews (PDPRs).
### TP Development Opportunities

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<tr>
<th>Area of expertise</th>
<th>Elements</th>
<th>Opportunities to Develop</th>
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<tbody>
<tr>
<td>Leadership</td>
<td><em>Demonstrating personal qualities</em></td>
<td><strong>Education:</strong></td>
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<td></td>
<td>- Developing self awareness</td>
<td>NHS Leadership programmes</td>
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<td>- Managing yourself</td>
<td>Leadership literature</td>
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<td>- Continuing professional development</td>
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<td>- Acting with integrity</td>
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<td><em>Working with others</em></td>
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<td>- Developing networks</td>
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<td>- Building and maintaining relationships</td>
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<td>- Encouraging contribution</td>
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<td>- Working within teams</td>
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<td><em>Managing services</em></td>
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<td>- Planning</td>
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<td>- Managing resources</td>
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<td>- Managing performance</td>
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<td><em>Improving services</em></td>
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<td>- Ensuring patient safety</td>
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<td>- Critical evaluating</td>
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<td>- Encouraging improvement and innovation</td>
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<td>- Facilitating transformation</td>
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<td><em>Setting direction</em></td>
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<td>- Identifying the contexts for change</td>
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<td>- Applying knowledge and evidence</td>
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<td>- Making decisions</td>
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<td>- Evaluating impact</td>
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<td><em>Creating the vision</em></td>
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<td>- Developing the vision for the organisation</td>
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<td>- Influencing the vision of the wider healthcare</td>
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**Experience / exposure:**

Self assessment tools, e.g.
- The leadership framework self assessment tool (currently available at [http://nhsleadershipframework.rightmanagement.co.uk/](http://nhsleadershipframework.rightmanagement.co.uk/))
- 360 degree feedback

On-the-job activities
- Analyse how you do things
- Try new ways of working
- Learn from your mistakes

Share these experiences with others

Ask for feedback from others, formal and informal, from your peers and colleagues, e.g. how you interact at meetings, presentation style etc

Stretch projects – pushing yourself to work out of your comfort zone

Personal projects – making change happen

Leading meetings – have a go at chairing a meeting and seek feedback

Coaching / Mentoring – either identify a coach or mentor for yourself, or be a coach or mentor for another member of staff

Shadow colleagues, peers and seniors
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<tr>
<th>Area of expertise</th>
<th>Elements</th>
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| **Scientific**    | Serology  
- Blood groups  
- Laboratory compatibility procedures |  
Dependant on professional background/experience  
**Education:**  
NHSBT Scientific and technical training courses ([http://hospital.blood.co.uk/](http://hospital.blood.co.uk/))  
Serology textbooks / journals / websites / on-line e-learning  
National Guidelines e.g. BCSH ([http://www.bcshguidelines.com/](http://www.bcshguidelines.com/))  
**Experience / exposure:**  
Shadowing laboratory staff |
| **Medical**       | Appropriate use of blood components  
- Alternatives to transfusion  
- Safe use of blood components – administration procedures  
- Management of transfusion reactions |  
Dependant on professional background/experience  
**Education:**  
Transfusion conferences  
Transfusion textbooks / journals / websites / on-line e-learning  
National Guidelines e.g. BCSH ([http://www.bcshguidelines.com/](http://www.bcshguidelines.com/))  
SHOT reports ([http://www.shotuk.org/home/](http://www.shotuk.org/home/))  
MHRA ([http://www.mhra.gov.uk](http://www.mhra.gov.uk))  
**Experience / exposure:**  
Shadowing clinical staff  
Visit clinical areas and observe practice |
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| Other             | IT Audit, Report writing, Project management, Time management, Risk management, Root Cause Analysis, Incident reporting, Learning from Patient experiences | Visit other hospitals and observe practice  
Network and discuss with colleagues and peers (e.g. regional TP meetings)  
Dependant on professional background/experience  
**Education:**  
A myriad of courses and training events, both in-house and run by external agencies (NHS and non-NHS):  
- Face-to-face  
- On-line  
- Self taught  
SHOT Resources e.g. Root Cause Analysis Toolkit (http://www.shotuk.org/home/)  
Transfusion conferences – lectures and posters / abstracts  
**Experience / exposure:**  
Network and discuss with colleagues and peers (e.g. regional TP meetings)  
Get an IT ‘buddy’  
Have a go and learn from experience  
Join a regional / national audit group  
Ask for feedback from colleagues  
Identify someone who is proficient in a specific element and ask for support, advice and feedback  
Consider learning from patient experiences of blood transfusion either by asking individual patients about how their experience could have been improved or approach a formal patient group |
Suggested Use of the Framework

The TP Development Framework is not intended to be an exhaustive list of opportunities, but aims to offer some suggested developmental options that can be explored as part of an ongoing personal development plan.

It is suggested that the Framework is used as a discussion tool when thinking about personal development as part of an individual's appraisal and personal review.

The opportunities presented in the Framework can be thought about and explored in any order the individual wishes and is not intended to be a prescriptive, chronological list. The ideas presented can be chosen in any order depending on an individuals experience and requirements in that area.
Appendix 1

Transfusion Practitioner Workshop – Overview of the Day

A Transfusion Practitioner (TP) workshop took place on 2 December 2011 in Birmingham. This workshop was facilitated by Kairen Coffey (NHSBT Better Blood Transfusion Education and Audit Lead) and Andrea Harris (NHSBT Better Blood Transfusion Regional Lead).

The aim of the workshop was to produce a selection of development opportunities specifically for TPs.

The day was attended by nine TPs (one TP could not attend), representing each RTC region in England.

The workshop was structured around a series of discussions that explored the leadership skills and qualities needed to be an effective TP. Discussions were purposefully steered away from formal ‘courses’ and focused more on the leadership skills needed to fulfil the role.

Using the new NHS Leadership Framework (www.nhsleadership.org.uk and www.e-lfh.org.uk/LeAD) the group identified various leadership skills needed for their challenging and often diverse roles. A range of opportunities were identified whereby these skills can be further developed (discussions focused on cost-effective options that could be ‘built into’ the day job).

The group identified the following skills as leadership skills they needed to be effective in their role (an overview of NHS leadership framework was given first)

Main points:
- Self-awareness (including looking after yourself and knowing your limits)
- Professionalism
- Influencer
- Negotiator
- Motivator
- Coach/mentor
- Visible role model
- Change agent
- Flexible approach to workload and individuals
- Listening and effective communication
- Know your values/ethics
- Effective challenging
- Creative and innovative
- Credibility both in person and in the role
- Encouraging ‘the heart’ (i.e. intuition)

Finally, the group were asked to identify cost-effective and realistic opportunities that currently exist to develop some of the identified leadership skills needed for their role.

Before any development needs can be identified, an individual needs a detailed development plan drawn up in conjunction with their line manager.
- Shadowing colleagues, peers and seniors
- Stretch projects (pushing you to work out of your comfort zone). These can be both formal and informal projects (where you could challenge or contribute)
- Personal projects - you driving change, making change happen
- Leading meetings (have a go at chairing a meeting or change the chair of the meeting regularly)
- Get feedback (formal and informal) from your peers and colleagues (e.g. how you interact at meetings, presentation style etc)
- Identify a mentor or a coach
- Be at mentor or coach to more junior member of staff
- Being more politically aware i.e national news, wider reading, Trust information, organisational objectives
- Networking - locally, regionally, nationally, finding forums and making the most of every opportunity
- Get a buddy - locally or nationally (using telephone or face-to-face meetings). Can be used to bounce ideas off, share experiences etc
- Action learning sets (*see additional information below)
- 360° feedback sessions (see www.nhsleadership.org.uk for more information)
- Get more involved in Trust policy-making/business planning
- Critically evaluated performance - as individuals, peers, or teams. For specific feedback link to your own leadership behaviour
- Increased visibility - i.e. on wards, at meetings etc. Maintaining an ‘open door’ policy

We asked the TPs that attended the workshop to gather feedback from TP colleagues in their RTC regions and feedback to us by the end of February 2012.

This was then mapped onto the Leadership Framework and this development framework document was produced.
Appendix 2

**Action Learning Sets**

**What is Action Learning?**

Action Learning was founded by Reg Revans in the 1920’s during his time as a student at Cambridge University. He noticed that some students could lack energy in the classroom but were enthusiastic and energetic when they discussed their own problems and shared experiences. Revans wanted to make the link between thinking and doing to find a way to help people to not only share their experiences but also to support each other to find solutions to their work related problems or issues.

Revans described action learning as "a means of development, intellectual, emotional or physical, that requires its subjects, through responsible involvement in some real, complex and stressful problem to achieve intended change... Learning by doing may be perhaps a simpler description of this process" (Revans, 1982).

Action learning involves working on real problems, focusing on learning and implementing solutions (Weinstein, 1995). The format for action learning is a small group of people (or set), usually no more than 8, who meet together to discuss real problems or issues. The purpose of the set is to help support the group members or ‘issue bringers' to think through their problems from different perspectives and discover actions or solutions that help the issue bringer make progress with their problem. Group members predominately use coaching skills (Downey, 2003) to support the issue bringer by assisting in the diagnosis of the issue, asking questions and feeding back what they hear and see.

Action learning sets are facilitated by a ‘set advisor' whose primary role is to help and support group members to move forward with their issues, encouraging participation from the whole group. Set advisors use coaching skills, active listening (Covey, 2004), reflect back to the group and keep the group moving, with the purpose of guiding set members to support each other, as well as receive help for their own problem. Set advisors also time keep and set the ground rules for the set, including confidentiality, respect for others, taking responsibility and being committed to the support of others.

**Benefits of Action Learning**

Action learning has many benefits for both the individual and the organisation. Mike Pedler explains that ‘action learning is an approach to the development of people in organisations which takes the task as the vehicle for learning” (Pedler, 1991). Using Pedlers approach as a ‘vehicle for learning’ action learning is used in many ways within an organisation, for example to support learning programmes or to provide supervision or continuing professional development for professional practitioners.

Benefits for the organisation include the development of skills following a training programme to ensure they are effectively embedded into practice resulting in a more engaged and productive workforce that meets organisational objectives. Project based action learning, where sets meet to discuss the same problem and have a common aim enable change to be managed and implemented effectively increasing
buy in from staff. Action learning that provides supervision for practitioners increases self awareness and responsibility as well as encouraging development.

Benefits for the individual include increased motivation and confidence due to being supported by colleagues and gaining fresh insight into a complex problem. The set members build trust and rapport which provides a safe environment to explore problems and realise they are not alone. Action learning gives dedicated thinking time, or time to stop and reflect on a problem from a variety of angles, enabling change and breakthrough. It also encourages the individual to take responsibility for their problem or issue.

Kolb’s Learning Cycle (Kolb, 1984) shows how action learning enables an individual to work through each stage of the learning cycle (as shown below). A set member brings an issue (or experience) to the group describing their problem to the group members. The set encourages the issue bringer to review and reflect on their problem and look at options available to them. The group can also help the issue bringer with action planning, priorities and testing out new ideas.

(Kolb, 1984)
References


National Leadership Council (2012a) Leadership Qualities Framework
http://www.nhsleadershipqualities.nhs.uk

National Leadership Council (2012b) Leadership Development Module
http://nhsleadershipframework.rightmanagement.co.uk/how-to-use-dev-guide


Recommended Reading

1. www.leadershipacademy.nhs.uk
2. www.kingsfund.org.uk/Leadership
3. www.rcn.org.uk/development/.../leadership/.../guidance
4. www.e-Ifh.org.uk/LeAD
5. www.nmc-uk.org/Publications/Guidance/
6. www.mhra.gov.uk /conferenceslearningcentre