

2022



Graduate Management
Training Scheme

Programme Manager and Placement Manager Handbook



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Welcome

“I’d like to begin by thanking you for your interest and commitment in hosting a trainee. The Graduate Management Training Scheme (GMTS) is in the top 3 graduate employers within the UK according to the 2021 Times Top 100 survey, which is down to the support and dedication of our programme and placement managers.”

Ensuring we continue to build a diverse pipeline of future leaders with the right skills, values, and competencies required for the future is vital to the delivery of health and care services and the Scheme would not continue without your support.

The majority of the learning experienced by a trainee takes place within their placements and it is here that they cement their education in practice. The time, compassion and support shown to trainees during their placements enables them to grow and develop and to go on to be inclusive and compassionate leaders themselves. As a programme or placement manager you will be a role model to the trainee, instilling the values and behaviours we wish to see within our leaders.

We hope that this handbook will equip you with the knowledge and understanding of the Scheme to enable you to support your trainee as they progress and answer any questions you may have. If you have any feedback or have any other questions, please do contact us at graduateenquiries@leadershipacademy.nhs.uk so that we can work together to ensure a great experience for your organisation and the trainee.

Sally Scales, Head of NHS GMTS Leadership Programme

Introduction

This handbook is designed to support you in your role as programme or placement manager for the Graduate Management Training Scheme (GMTS). It provides an overview of the Scheme, outlines your key responsibilities, and provides additional guidance on general GMTS administration.

Although all trainees are extremely ambitious, their background and prior experiences will vary considerably, with some joining straight from university, while others may have many years of experience from a range of sectors. There is no age limit for candidates looking to join GMTS. Managed well, you can ensure that trainees gain the experience and insight needed to become a successful leader in the NHS. Host organisations and managers also benefit from gaining different perspectives and ways of thinking. Indeed, many trainees over the years have been responsible for key pieces of work within their organisations which remain in place today.

“A good programme/placement manager is somebody that is able to support, guide and especially teach a graduate student through their time in the placement. It requires patience, openness, honesty, but most of all it requires willingness to teach and be there and connect the grad with others. I think what was great about my programme manager and my second placement manager is that they understood it’s about creating opportunities for a graduate to be exposed to more than just the placement role and made it a fantastic learning and development opportunity.”

Trainee

To get the best from your trainee(s), it is vital that as programme and placement managers, you can commit the time and resource to support your trainee, ensure they are being challenged in the work they are undertaking and are supported to grow.

There may be situations where you need additional guidance beyond that found in this handbook, and this is where your regional Leadership Academy team can step in to support. Whilst GMTS is a national scheme, each region has a dedicated GMTS team whose role is to support the host organisations, programme, and placement managers. They are there to answer queries or step in if there are challenges or concerns. If ever a situation arises where you are unsure of the action or response, please contact your regional team:

East of England	eoel@leadershipacademy.nhs.uk
London	graduateenquiries.lase@leadershipacademy.nhs.uk
Midlands	midlands@leadershipacademy.nhs.uk
North East & Yorkshire	england.gmts.ney@nhs.net
North West	nwla.gmtsnw@nhs.net
South East	gmts.sell@leadershipacademy.nhs.uk
South West	leadership.SW@leadershipacademy.nhs.uk

Additional support is also available from your regional trainee support manager (TSM) and further resources can be found in the Information Zone on the GMTS Geni system.

Overview of GMTS

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Specialisms

GMTS provides fast-track leadership development for trainees across 6 different specialisms:

- General Management (GM)
- Finance (Fin)
- Human Resources (HR)
- Health Informatics (HI)
- Health Analysis (HA)
- Policy and Strategy (P&S)

The duration of the Scheme is 2 years for all specialisms except Finance. The Finance specialism is 2 years and 6 months due to an extended academic component. A summary of the placement structure is shown on [page 8](#).

Placement information

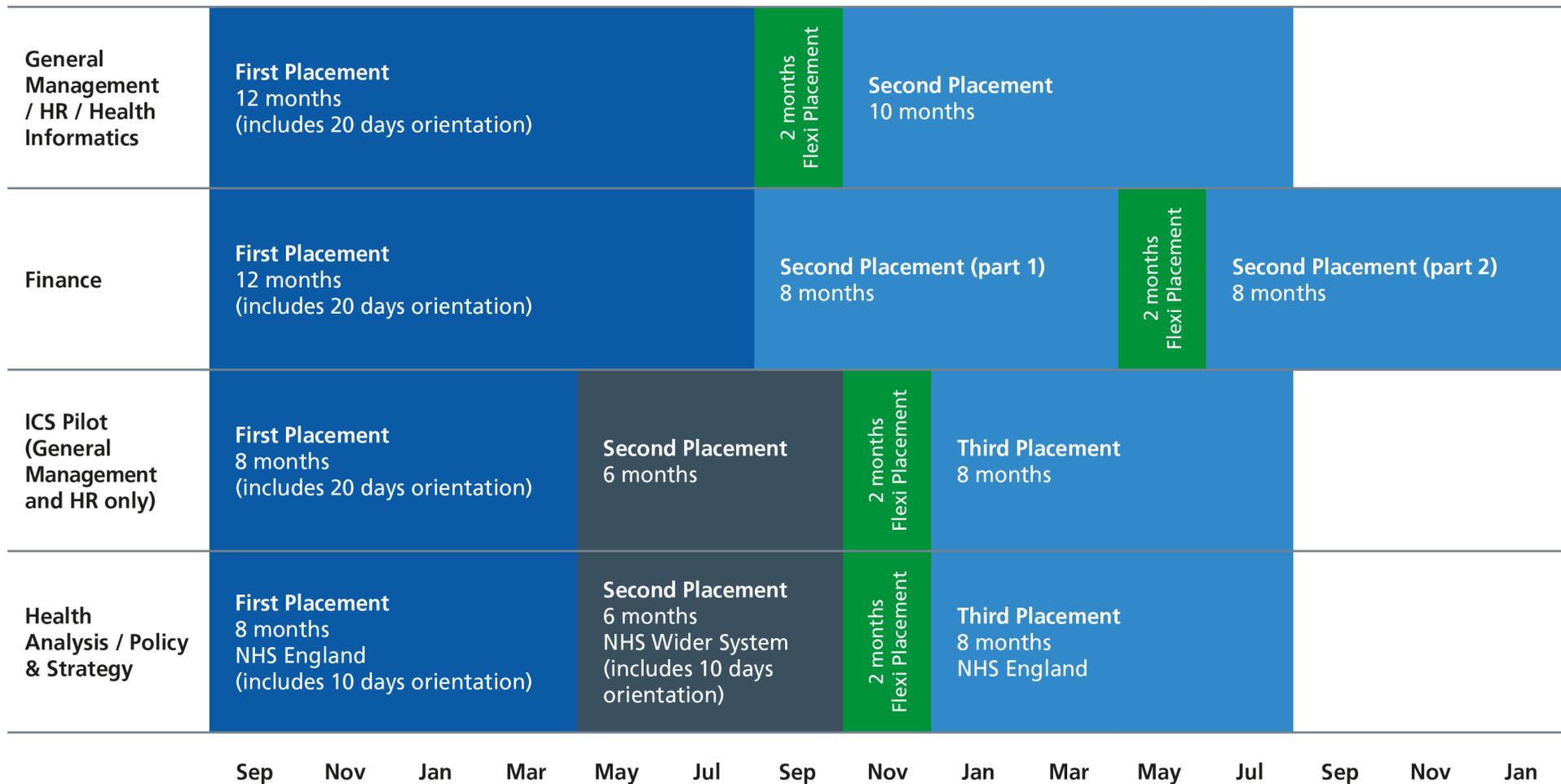
All trainees undertake a minimum of 3 placements: an operational placement, a strategic placement, and a flexi placement. Most trainees undertake an operational placement first, however this can vary according to the requirements of the organisations and specialism.

For example, a HR trainee should have a placement focused on operational aspects of HR such as employee relations or workforce, and a strategic placement such as organisational development or talent management. The combination of placements should ensure trainees have appropriate opportunities to achieve their competencies.

Health Analysis and Policy and Strategy trainees are based in NHS England for their first and final placements; their second placement is a 6 month NHS placement which provides wider system experience.

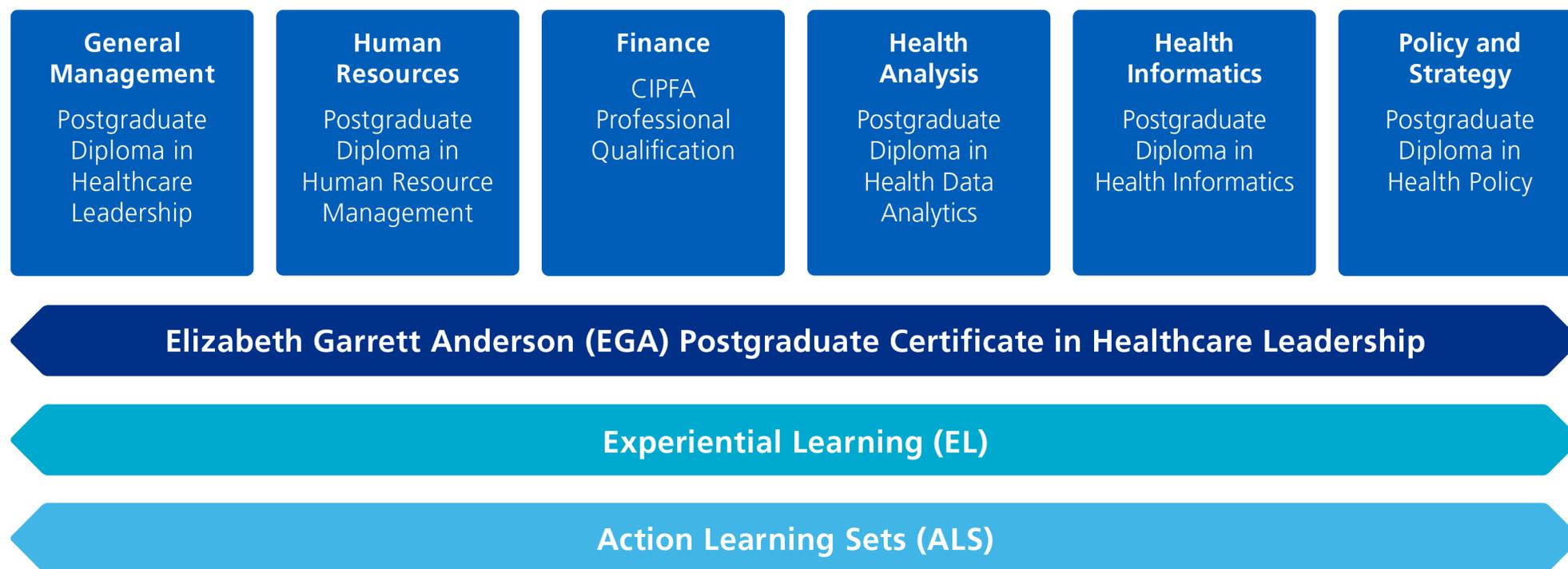
The flexi placement is an 8 week placement, typically between the first and final NHS placements. The trainee chooses this placement with the support of their programme manager, and it should support their ongoing learning. Further details can be found in the flexi placement section.

GMTS placement structure



Education overview

Alongside their placements trainees will complete a variety of education and training that will help them develop their specialist and leadership skills as shown below:



Programme Manager and Placement Manager roles and responsibilities

Key to the success of the work-based placement is the support a trainee receives from staff members based at the host organisation.

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Programme Manager role

The programme manager will be a senior member of staff (band 8a or above) who is well-connected both within the host organisation and the broader system. They will oversee the trainee's progress throughout their time on the Scheme.

The programme manager will plan a comprehensive orientation to the health and social care system for the trainee. This may include aspects of the host organisation operations as well as introductions to primary and social care; third sector; emergency response. Orientation should introduce the trainee to the variety of roles that might not be obvious to the public and provide a 'cradle to grave' overview of the NHS. In order to do this well, the programme manager will make use of their networks and connections, collaborating with other hosts in the system.

The programme manager will meet with the trainee monthly and will take a keen interest in the trainee's development as a manager. They will role model compassionate leadership values and use their connections to find development opportunities for the trainee. They will help the trainee to identify a flexi placement that will complement their career journey. They will stay informed of the academic progress of the trainee and ensure the trainee is meeting milestones. Where necessary they will challenge and stretch the trainee to think more strategically and across the organisation or system. They may have to intervene if the trainee is struggling with theory or practice and especially if the trainee is not meeting the standards we expect. This is a role where a senior leader directly influences a trainee and gives them the benefit of their time, experience, and wisdom.

In addition, the programme manager will oversee and monitor the work and performance of the placement manager in respect to their GMTS role. They might not be the line manager of the placement manager, but they must ensure the placement manager is undertaking the duties expected of them and that they are role modelling NHS values and the Code of Conduct for Managers. The programme manager will maintain a close relationship with the regional Leadership Academy and ensure any concerns are reported at the earliest possible point.

Programme managers should check arrangements a few months before the trainee is due to transfer placements to ensure all arrangements are in place. This provides sufficient time to make any adjustments due to issues such as changes in staffing etc.

A role description is available in the appendix with further information.

Key responsibilities and duties are outlined below:

The role of the programme manager	Start of the programme ▼	supports with the development of the trainee's orientation programme
		ensures all arrangements for the placement are in place
		provides any necessary support to the placement manager in creating a supportive and developmental environment
	Monthly/ quarterly ▼	holds regular monthly or bi-monthly meetings with the trainee to check progress and offer pastoral support if required
		supports and enables the trainee to network, both within the organisation and across the system
		reviews the progress of the trainee to ensure academic and competency milestones are being met
		reviews and supports the development of the trainee's personal development plan (can be completed within 1-1 meetings)
		oversees the placement manager to ensure GMTS requirements are being met and provides support as required
	Adhoc ▼	supports the trainee to identify a flexi placement, and signs off the final proposal
		reviews feedback from the flexi placement, and signs off flexi placement competencies on Geni
		assists the trainee in finding a suitable mentor and shadowing opportunities both within their organisation and the wider NHS system
		ensures arrangements are in place for the trainee to transfer to any subsequent placements
		identifies an alternative placement manager for the trainee if required due to staff or organisational changes
	End of programme ▼	ensures the trainee has met GMTS requirements regarding education and competency completion
		provides support if required to the trainee with securing a role post-Scheme
		gathers feedback on the trainee's experience

Placement Manager role

The placement manager is an excellent, proven manager in the area of work where the trainee has been placed. They will be a role model and the line manager of the trainee while on placement.

At the start of the placement, the placement manager will ensure the trainee is fully inducted into the team and the organisation, making sure that colleagues know the trainee is coming and that they will have responsibilities outside work that take them away regularly. [Appendix 7](#) provides suggested role clarity interview questions placement managers can use to understand more about their trainee during induction. The placement manager will provide a comprehensive job description with a real job title. The job description should be an accurate depiction of the tasks a trainee will be undertaking.

The placement manager will meet with the trainee regularly to discuss day-to-day work, academic expectations, competencies, and conduct. The placement manager will regularly review Geni to update the trainee's record and will authorise any leave taken by the trainee, ensuring that GMTS education commitments adhered to. The placement manager should regularly monitor performance using probation and performance reviews to document the achievements and the areas of improvement for the trainee.

The placement manager will liaise with the programme manager on the trainee's progress and seek support if there are any challenges. The placement manager identifies training opportunities within the organisation to supplement their official education. As the trainee's day-to-day line manager, they will ensure the trainee support manager (TSM), is aware of any concerns relating to the trainee's employment (absence, change in circumstances, performance, health, and wellbeing etc) so that this can be effectively managed by the NHS Leadership Academy and NHS Business Services Authority (NHSBSA). When the trainee is moving placements, a handover meeting between placement managers is also recommended.

A role description is available in the appendix with further information.

"When managed well you have a very engaged and motivated trainee that runs with projects, becomes a part of your team and is a key contributor who shares their learning and experiences at every level."

Placement manager

Key responsibilities and duties are outlined below:

The role of the placement manager	Start of the programme ▼	provides support during orientation
		completes a role clarity conversation at the end of orientation
	Weekly/ monthly ▼	day-to-day line management of the trainee
		responsible for allocating work tasks and duties in line with the job description and ensuring the trainee has sufficient and appropriate work with opportunities for development
		holds regular one-to-one meetings with the trainee
	monitors the performance of the trainee and provides regular and honest feedback	
	complies with administrative and managerial responsibilities including attendance, signing off leave, expenses in line with GMTS policies and updates Geni accordingly	
	completes probationary reviews (first 6 months)	
Bi monthly/ quarterly ▼	supports the trainee to achieve their competencies	
	reviews and supports the development of the trainee's personal development plan (PDP)	
6 monthly	completes performance reviews	
End of programme ▼	arranges a handover meeting with next placement manager	
	gains feedback on the placement experience	

Programme manager and trainee one-to-one meetings

The programme manager will have oversight for the full duration of the trainee's time on the Scheme. This is to ensure the trainee's progress is on track and to support the trainee in considering wider opportunities that may be available to develop competencies and leadership skills further. Like the placement manager role, the programme manager is key to the success of the trainee and therefore is required to have regular one-to-one meetings with their trainee(s).

How often?

Unlike the placement manager, who is recommended to have regular weekly or fortnightly meetings with their trainee, the programme manager should be meeting with their trainee monthly. It is recommended the meetings are booked in advance for the full duration of the programme. They can always be rescheduled, if need be, but having them in the diary will encourage both programme manager and trainee to ensure the meetings are maintained.

What should a one-to-one include?

The one-to-one between programme manager and trainee should very much be seen as an informal mentor role, to understand how the trainee is progressing within their placement, identify additional opportunities available to support the trainee in their development, and to provide access to wider networks for the trainee to start to grow their own. Some areas that could be included within the one-to-one meeting between programme manager and trainee could be:

- trainee progression within the placement
- level of support provided by their placement manager and wider team
- additional opportunities the trainee may benefit from to support their development that the programme manager may be able to provide access to
- flexi placement planning
- career pathways beyond GMTS

Placement manager and trainee one-to-one meetings

Just like any colleague, it is vital that trainees feel a part of their team and have a structured workflow to ensure that not only are they able to sign off their competencies, but they can see the benefit their work and actions are bringing to the team and wider NHS. To enable this, it is important that the trainee's placement manager is present as any line manager would be for their direct reports.

How often?

One-to-ones should be held at the very least fortnightly, if not weekly, especially where the trainee is new to the Scheme and possibly new to the work environment or they are working from home which brings added challenges to fitting into a team. It is recommended that these meetings, along with the probation and performance reviews, are booked in advance for the entire placement to ensure they are not missed. This will provide the trainee confidence that they will have an opportunity to ask questions and feedback on their placement at regular intervals, as well have the full support from their placement manager. It may be that some of the meetings may need to be rearranged due to unexpected work pressures, however it is easier to do this when they are already booked in advance, than trying to find a time when diaries fill up quickly.

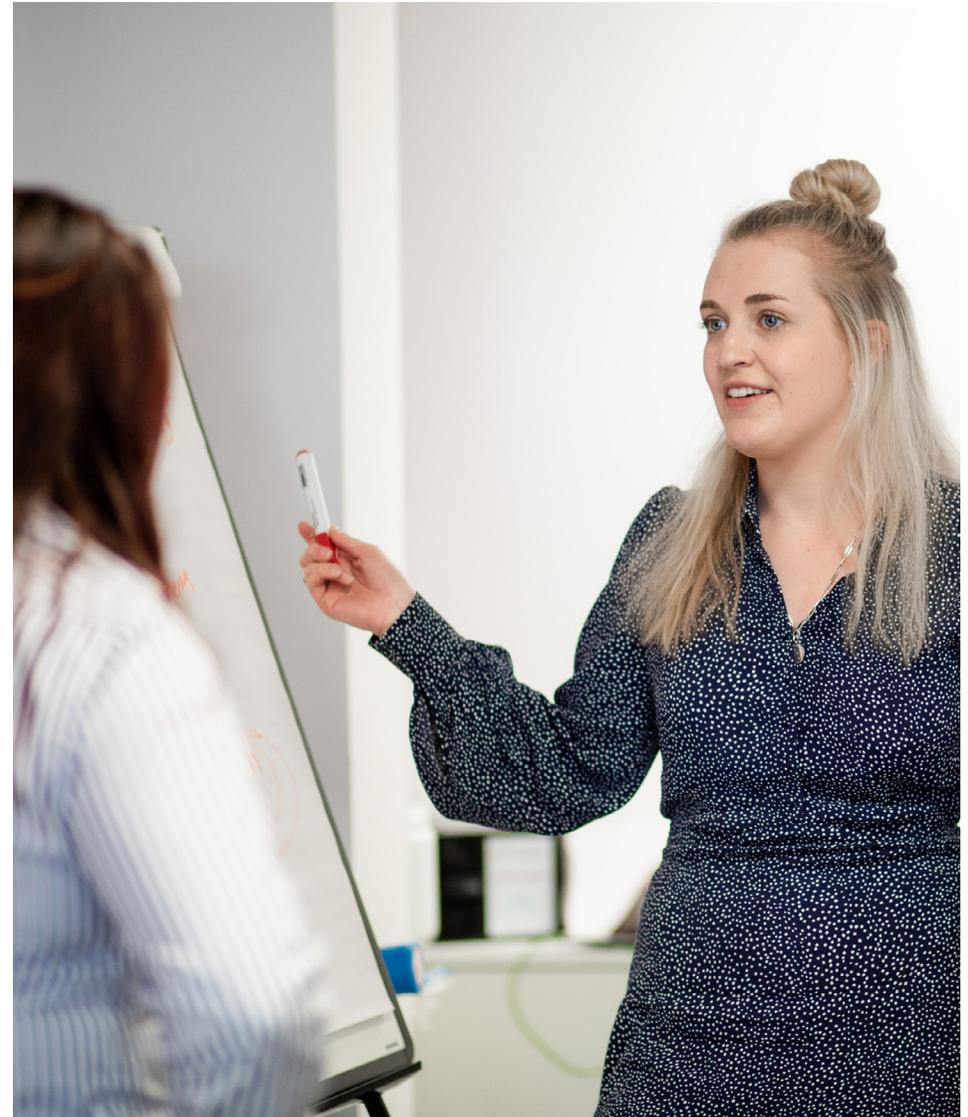
What should a one-to-one include?

It is important to differentiate the one-to-one from the probation and performance reviews. One-to-ones are very much about checking in with the trainee to ensure:

- they are clear about the work they have been tasked with
- the work is at the right level to develop their skills
- they feel supported to be able to do the work they have been tasked with
- they feel they are supported in other GMTS related commitments, e.g., education and competencies
- they feel they are part of a team and know who to speak to with questions
- they receive regular feedback on their work performance

Placement managers should think back to when they have had a supportive line manager in the past. How were those one-to-ones structured? How useful were they? Placement managers may consider a coaching approach to one-to-ones to support their trainee to become an autonomous practitioner. A placement manager shouldn't become the 'fixer', trainees should be encouraged to research and present back with a solution.

Example one-to-one questions can be found in [appendix 7](#).



Preparing for your trainee

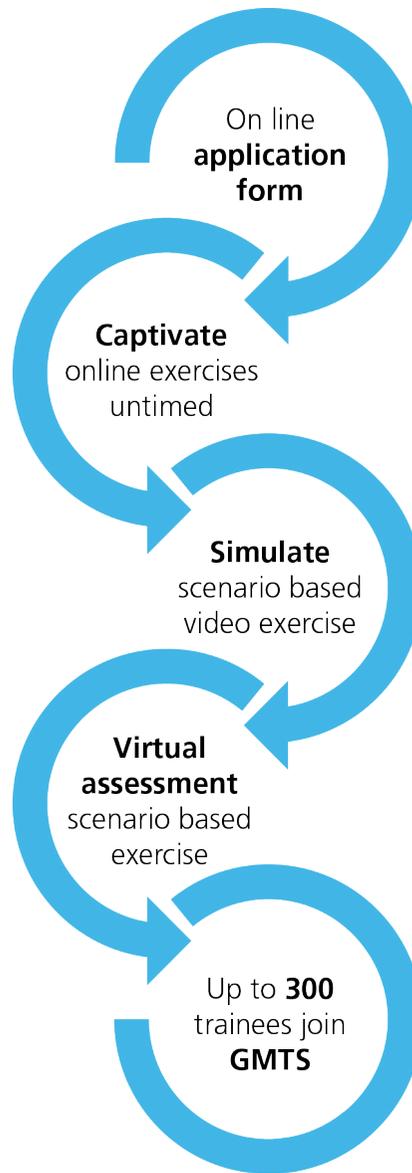
Please review all the sections below to ensure you have everything in place prior to your trainee starting with you.

• Recruitment process	19	• Electronic Staff Record (ESR)	22
• Pre-placement introductory meeting	19	• Job description	22
• Planning GMTS NHS orientation	20	• Remote working	22
• Honorary contracts	21	• Occupational health and reasonable adjustments	23
• Recruitment checks	21	• Inclusion	24
• Statutory and mandatory training	21	• Buddy	24
• IT access	22	• Type of work	24

Recruitment process

Trainees who have been selected onto the programme have completed a variety of strengths-based assessments and demonstrated NHS values and leadership capabilities. The selection process they have undertaken is outlined in the right hand chart.

Once trainees are offered a place on the GMTS programme, there is a period of onboarding whilst recruitment processes are being completed. During this time, the Leadership Academy will have regular contact with trainees to maintain engagement, provide support and answer any questions, this includes online webinars and regular communications.



Pre-placement introductory meeting

Programme and placement managers should contact and meet with their trainee before their start date. Trainees will require information on the role and practical arrangements such as working hours, parking, office locations etc. Some trainees may be relocating and therefore may seek advice on where to live, advice on transport links etc.

For many trainees this is likely to be their first job after university and have very limited knowledge of the NHS or the specialism they have selected. It is important therefore to establish their level of knowledge and experience so you can tailor their induction accordingly.

A handy checklist is included within [appendix 3](#) on what to discuss in your first meeting.

Planning GMTS NHS orientation

The NHS orientation typically takes place across the first 20 days of the Scheme, but circumstances may require orientation days to be spread out across the first few months. Health Analysis and Policy and Strategy trainees will undertake 10 days orientation with further days arranged during the NHS operational placement. Orientation provides an opportunity for trainees to shadow, support and gain hands-on experience across all areas within the NHS to ensure they get as comprehensive an understanding as possible of how the NHS works, it is not necessarily related to the specialism or role.

Purpose:

- to learn about health and social care through the eyes of the patients, care givers and partner organisations
- to experience the delivery of patient care in a range of health care settings
- to understand how the NHS operates as an entity and how its components contribute to the delivery of health and social care
- to allow time for trainees to reflect on and evidence their experiences

The orientation period should be designed and organised by the programme manager, and it is recommended that orientation activities are planned at system level to provide a comprehensive programme. Trainees value the opportunity to attend some activities with other trainees as they can provide each other with support, and it reduces the organisational requirements for each Trust. We would encourage all trainees to have a hand in designing orientation where possible and would recommend that you discuss their orientation plan with them prior to them starting. If you are unable to include all activities during the orientation period, these can also be included in the trainee's professional development plan later. As part of the orientation, you may wish to include opportunities to meet the CEO and senior leaders, it is often beneficial to schedule these towards the end of the orientation period to enable trainees to feel more familiar with the organisation.

Please note: some aspects of orientation for Health Analysis and Policy and Strategy trainees may be co-ordinated centrally or by placement managers.

Expenses for orientation activities will be covered by the host organisation.

Best practice and examples of what to include are listed in the [appendix](#). Further information along with an Orientation Planner can be found on [Geni](#).

Honorary contracts

Some organisations require trainees to have an honorary contract in place for trainees to be set up with the correct access and claim expenses. Please check with your HR department, and if required please ensure this is completed in advance of your trainee starting.

Recruitment checks

NHS Business Services Authority (NHSBSA) is the employing organisation for our GMTS trainees. As part of the recruitment process, NHSBSA has completed the following employment checks for all trainees:

- 2 satisfactory references
- a traceable 3 year history
- medical clearance proof of identification
- the Right to Work in the UK
- proof of degree qualification
- a standard DBS check

Should you require evidence of this, please contact your TSM.

Statutory and mandatory training (MaST)

Trainees will be required to complete NHSBSA mandatory training. You should inform your trainee of any additional MaST training they need to complete for your organisation whilst you are hosting them and provide them with access details.

IT access

All trainees are provided with an nhs.net email account linked to the NHS Leadership Academy prior to starting the Scheme. If as a host organisation you use nhs.net and you need their email account linked to your own organisation, please inform your trainee. Their Trainee Handbook provides instructions on how to transfer their email account. If your trainee requires local IT access, or access to specific programmes for their role, we recommend setting this up prior to them joining your organisation. We would also recommend ensuring that a laptop or mobile phone is set up for them before commencing their role, to avoid delays.

Electronic staff record (ESR)

NHSBSA will issue trainees with an ESR login to access their ESR account. This account will provide details of their salary, NHSBSA mandatory training and other important information.

As a host organisation, you may also need to set your trainee up with an ESR record for any local training, payment of expenses etc. If required, please inform your trainee, and provide the necessary login details.

Job description

All trainees should be provided with a job description outlining their role during their placement. Ideally, this should be shared with your trainee in advance of them starting.

Remote working

Trainees who are required to spend a significant proportion of time working from home during their placement can find it harder to settle into their role and integrate into the team. They lose the opportunity to network with a wider range of people and can find it difficult to ask questions or seek support. These trainees will require more support and will benefit from daily contact from members of the team. Placement managers should consider what additional support can be put in place particularly during the first few months. Practical arrangements also need to be reviewed for example whether the trainee has got a suitable desk, chair, space to work etc. To ensure appropriate arrangements and equipment are in place, trainees should complete your organisations DSE/ workstation assessment. A remote working guide is available on Geni for additional support.

Occupational health and reasonable adjustments

All trainees complete an occupational health questionnaire as part of the onboarding process. Where additional information is required, a further assessment is completed, and an occupational health report is generated. This report is then shared with GMTS and the trainee. The trainee has the option to keep the report confidential, however they are encouraged to share their report to ensure we can best support their needs. If consent is provided, your trainee support manager (TSM) will share the report with you in advance of the trainee starting their placement.

Please discuss with your trainee any additional support required and your TSM can assist you with this process. We are mindful that trainees themselves are best placed to know their individual needs and adjustments. Trainees will be supported by their TSM and have access to a Reasonable Adjustment Information Sheet to support conversations about reasonable adjustments. It is important to remember that trainees who require reasonable adjustments are expected to hold several of these reasonable adjustment plans (for placement, university, occupational health, and the Leadership Academy). Your trainee may also have to go through

the occupational health process with your organisation to access reasonable adjustments, equipment (such as specialist chairs), adaptive software. These processes can be lengthy, and the trainee should be supported to start them as soon as possible.

Trainees may be requested to apply for an Access to Work Grant. Access to Work offers support based on an individual's needs, which may include a grant to help cover the costs of practical support in the workplace such as specialist equipment, adaptations, support worker services, help getting to and from work. The current waiting time for an Access to Work Grant is 6-12 months so trainees should be supported to start this process as early as possible. Whilst waiting for an Access to Work Grant trainees should be given alternative solutions (e.g., more working from home) to support them in the workplace until their grant is in place.

Please note that a further referral to Occupational Health can be provided at any point during a trainee's time on the Scheme if their circumstances change and additional support is required.

Inclusion

As trainees develop their future leadership skills, it is a requirement that inclusion, equality and diversity are embedded into all our placements, processes, and GMTS components. Within local academies, specialist staff are available to provide host organisations with additional support and guidance as required. Additional inclusion resources and toolkits are available [here](#).

Trainees may find it helpful to connect with staff networks and groups in your organisation. Trainees interested in championing this area of work can also participate through our trainee voice structure. Further details are available in the support section of this handbook.

Buddy

All trainees are allocated a buddy from a previous GMTS cohort in the same specialism. The buddy can provide informal peer support and provide additional guidance. If you have in your organisation other graduates or alumni of GMTS you may wish to support them with introductions.

Type of work

Trainees should have a clear understanding of their role and responsibilities for their placement. After orientation trainees should be allocated specific work tasks as this helps them to feel part of the team. In general trainees are expected to be undertaking work activities equivalent to band 5 and during the Scheme build up to a band 7 role. On completion, trainees move into band 7 and some 8a posts depending on their level of experience.

Further information

Further information can be found by logging into Geni and selecting the link below:

- [Scheme Wraparound and Support](#)
- [Competencies and Probation/ Performance Reviews](#)

Onboarding – the first 100 days

- Welcome Event 26
- Settling your trainee into their placement 26
- Role clarity conversation 28

Welcome Event

The National Welcome Event takes place on days 1 and 2 of the Scheme, before trainees start in their placement. The event aims to give them an introduction to the NHS and hear from key leaders and stakeholders. On completion of the Welcome Event, trainees will start their NHS orientation within their first placement.

Settling your trainee into their placement

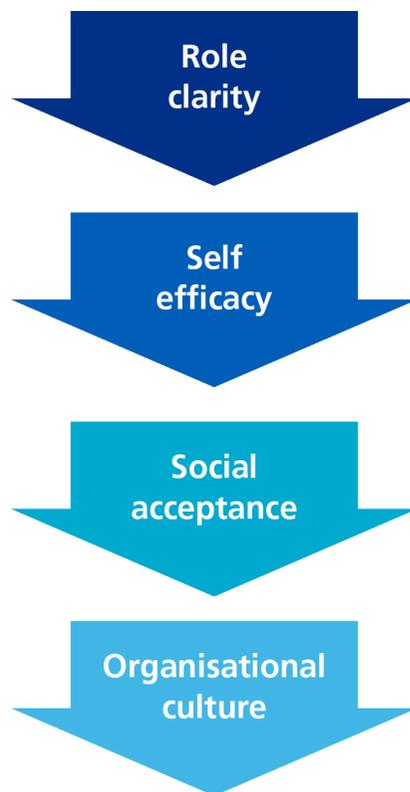
It may take a few months before your trainee starts to feel settled as they will be given a lot of information and meet many people in the first few weeks. Our structures and teams are complex within the NHS and there will be many terms and acronyms used that they will be unfamiliar with.

To assist this process, you may want to consider the following:

- an introductory communication to the team(s) to ensure they understand the role of the trainee (a Scheme summary is available in the [appendix](#))
- daily check ins with your trainee (particularly after orientation when they start to pick up work responsibilities)
- regular weekly meetings to assist with questions
- ensure your trainee has work tasks allocated to them and there is enough work at the right level
- having a defined role and responsibilities will help them feel part of the team
- linking them to other graduates or previous trainees working in the organisation / system to provide additional support and to help them feel connected

Evidence shows that retention and staff engagement is improved for new starters when they are:

- clear about their role and objectives
- they have the confidence to deliver what is expected of them
- they know and understand their teams and are accepted by them
- they understand the culture of the organisation and how the organisation expects them to behave



Supporting your trainee

- **Role clarity** - Being clear on your role and how your role fits within the team and the organisation is seen as a major contributor to staff wellbeing and engagement. By using a coaching style approach, managers are encouraged to ensure that trainees are clear on their roles and responsibilities, they understand what was expected of them and they understand their local and departmental objectives.
- **Self-efficacy** - Confidence to deliver what is expected of you has a positive impact on learning and personal resilience. Managers are encouraged to help to develop confidence of trainees by ensuring they receive developmental feedback and have an opportunity to reflect on their learning positively.
- **Social acceptance** - The 'feeling of fitting in' and relationships with colleagues and team that you work with increases motivation and engagement. Managers are encouraged to discuss team relationships and effectiveness. Poor interpersonal relationships are often cited as a reason for leaving.
- **Knowledge of the organisational culture** - Getting to know the culture of the organisation – 'how things are done here' and how that fits with your own personal values creates a sense of belonging. Managers are encouraged to explore the trainee's knowledge of their organisation, what networks they have made and still need in order to develop.

Role clarity conversation (post orientation)

Feedback from trainees has indicated they would value a role clarity conversation to take place after orientation, but prior to them commencing any projects. This is designed as a semi-structured conversation for a placement manager and trainee to discuss the trainee's experience, aims, and any concerns as they begin the role. The placement manager will be able to utilise the information gathered to maximise the experience of themselves and their trainee.

This conversation should ideally be around an hour long and provide an opportunity for you as a placement manager to get to know your trainee's strengths, areas of personal development, and how they will be integrated within your team or organisation. This also provides you with the opportunity to build rapport with your trainee, set expectations, and discuss any reasonable adjustments which may be required. This conversation should be separate from any performance or probationary processes, to encourage open discussion and avoid undue pressure for the trainee.

It is recommended that you use coaching style questions for this to facilitate non-directive development, and to create an environment where the trainee feels able to raise any queries prior to commencing their role. Examples specifically pertaining to the role clarity conversation can be found below, however further suggested coaching questions are outlined in [appendix 7](#).

“As a placement manager you need to make sure you set challenges that push your trainee out of their safety zone in a way that you can manage their confidence”

Placement manager

Role clarity conversation prompt questions

- How are you feeling so far on the Scheme?
- What are you looking for from the Scheme?
- What is your previous work experience?
- What are your career goals/what are you looking for in a career?
- Are there any areas/skills you are particularly good at?
- Are there any areas/skills you are particularly interested in?
- Are there any areas/skills you would be looking to develop further whilst on the Scheme?
- Are there any specific events or networking opportunities you would be interested in?
- Is there anything you are particularly worried about in relation to the Scheme/starting in your role?
- What are you doing to manage your stress levels?
- What are you looking for from me as a manager/how can I help you to have the best possible experience whilst on the Scheme?
- Is there any specific support you require to make the most of the Scheme?



Probation and performance reviews

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- Components of the review 32
- Personal development plan (PDP) 33
- Managing underperformance 34
- Recording probation and performance reviews on Geni 34
- Signing off probation 35

Overview

Throughout the Scheme, trainees are required to complete probation and performance reviews in line with the performance review timeline shown below. Each review should take place with the placement manager (or in certain circumstances the programme manager). Reviews should be completed, and details uploaded onto Geni by the end of the month e.g., 30th October for the October review.

Where there is an additional line manager as well as a placement manager, all reviews should be undertaken with the inclusion of the line manager or with their feedback.

For further information, please refer to the probation and performance guidance documents which can be found in the Information Zone on Geni.

Year on Scheme	Month	Probation/Performance	Required Competency Completion	
			GM, HR, HI, HA, P&S	Fin
Y1	October	Probation Review 1		
Y1	November	Probation Review 2		
Y1	December	Probation Review 3		
Y1	January	Probation Review 4		
Y1	February	Final Probation Review	15%	15%
Y1	August	Performance Review 1	40% - 50%	30% - 40%
Y2	February	Performance Review 2	60% - 70%	50% - 60%
Y2	August	Performance Review 3	90%+	70% - 80%
Y3 (Fin only)	February	Performance Review 4		90%+

Components of the review

Review Element	Description	Criteria
Performance objectives	<p>Work objectives should be set and reviewed by the placement manager, the objectives should support the trainee in gaining experience of working in large, complex environments and should outline what should be achieved, including indicators of success and timescales for achievement.</p> <p>Development needs should be discussed and recorded as part of the review.</p>	Does the trainee's performance meet the expected standard?
Specialism competencies	<p>Competencies are achieved through the range of experiences, skills, and knowledge acquired during the trainee's time on the Scheme and should link to work objectives. All competencies should be updated on Geni to accurately reflect progress and approved by the placement manager. Competency progression should be in line with GMTS requirements, if it is below the benchmark, an unsatisfactory grading should be recorded.</p>	Has the trainee met the required benchmark as outlined above?
Conduct	<p>High personal and professional standards are expected of NHS trainees and as future leaders of the NHS it is expected that trainees are already acting as role models to others. Behaviours will reflect the NHS Managers Code of Conduct showing commitment toward team and corporate objectives. Trainees must demonstrate working relationships established with colleagues.</p>	Is the trainee's conduct in line with expected standards?
Attendance expectations	<p>Outline and review the expected levels of attendance for trainees on the Scheme and how this will be monitored during probation. Behaviours which will be observed, including timekeeping and attendance.</p>	Is the trainee's attendance in line with expected standards?
Continued on next page		

Review Element	Description	Criteria
Academic attainment	<p>Trainees are expected to attend and actively participate in all elements of the educational programme. Trainees are required to record their academic performance onto Geni. Satisfactory academic progression will be continually monitored. Evidence of academic attainment being on track should be provided to the placement manager.</p> <p>If an education module has been failed this should be recorded as unsatisfactory until the module has been passed.</p>	Has the trainee attended and achieved the required education? components to date?
Personal development and continuing professional development	<p>The personal development plan (PDP) identifies and proposes how the trainee's own learning and development needs can be taken forward to support the achievement of the specialism competencies and work objectives. Trainees should start to develop a PDP when they start on the Scheme, and it should be reviewed regularly. Further details regarding the PDP are outlined below.</p>	Is an appropriate PDP in place?

Personal development plan (PDP)

All trainees are required to have a PDP in place for the duration of the programme. It should include additional skills, training, and development opportunities they would like to access. Trainees are encouraged to consider what other services, people, organisations they would like to meet or engage with. This could include arranging specific meetings with key individuals, observing meetings, and arranging shadowing opportunities. We recommend trainees start to plan their PDP after completing their orientation.

The PDP should be discussed and agreed with the placement and programme manager and reviewed at each of the probationary and performance meetings. It will be a live document that the trainee updates at regular intervals. An example template is available in the Information Zone on Geni – see folder 'Competencies and Probation/ Performance Reviews'.

Managing underperformance

Any areas of underperformance must be recorded on the probationary or performance review and trainees should be provided with feedback. If necessary, an action plan should be developed to

support the trainee. All performance related discussions should be well documented on Geni. If any concerns are identified, please contact your TSM for further advice.

Recording probation and performance reviews on Geni

Please note: Google Chrome is advised for using Geni. Please ensure you use the calendar to input the date and time and be aware that the Geni system will 'time out' after a specific duration and information may not be saved. It is therefore recommended that reviews are completed in a word document and then transferred across after the review. A handy template is available via [this link](#). To record a performance review on Geni follow the instructions below.

1. Click on the performance review tab. This shows all reviews requiring completion.
2. Click 'start' against the relevant review. During the performance review or following the performance review, the reviewing

manager should input the relevant information. The reviewing manager is encouraged to provide as much detail as possible to provide a detailed and accurate record of discussions/feedback. The reviewing manager can then mark whether each component has been achieved or not.

3. At the end of the review managers need to click 'save' and tick the box 'mark this performance review as complete' to accurately finish and record the performance review.

A YouTube video is also available through [this link](#).

Signing off probation

Trainees are required to successfully complete probation at the end of their first 6 months, this includes achieving the required 15% of competencies and satisfactory performance as outlined in the GMTS Probation Policy and additional guidance. The trainee's TSM is required to attend the final probationary review meeting and a GMTS senior manager may also be present if appropriate. Any concerns regarding probation should be discussed with your TSM, who will provide additional guidance.

Further information

Further information can be found by logging into Geni and selecting the link below:

- [Competencies and Probation/ Performance Reviews](#)



Competencies

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- Signing off competencies and ways of working 39
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Overview

GMTS aims to develop talent into emerging leaders in the NHS. It provides the opportunities for trainees to develop and practise their leadership skills and behaviour. The competency framework has been developed to ensure trainees develop the leadership competencies, behaviours, and technical skills to both attain roles in the NHS at the end of the Scheme and begin their leadership journey in the NHS.

The GMTS competency frameworks have been developed to ensure that:

- trainees have a structured approach to their placements
- trainee performance and achievement can be assessed, evidenced, and recorded
- trainees are equipped with the skills and experience to start their leadership journey in the NHS and obtain a job at the appropriate level once they complete the Scheme
- trainees have clarity around what is expected of them with regards to skills, behaviours, and competency which they are anticipated to develop and demonstrate

Competencies are split into core and specialism specific competencies.

Core competencies

These are common across all specialisms:

- project management
- leads and works within teams
- chairs and leads small group/team discussions
- communication, report writing, and presentation skills
- involvement in change management and system reform
- understanding of NHS values, constitution, and strategic direction
- understanding of the vision, strategy, and business plan of the host organisation

Specialist competencies

These are approved by relevant professional bodies for each specialism.

Competency rating scale

Each competency has a target level of achievement. The ratings are shown below:

Level	Description
1 Awareness/knowledge	demonstrates insight but no practical experience
2 Support	demonstrates competence through assisting others in undertaking a process /task
3 Practical application	demonstrates competence through having a defined responsibility for undertaking a process/task
4 Experienced practitioner	demonstrates competence through having a defined responsibility for regularly undertaking a process/task
5 Leadership	demonstrates competence through leadership of a process/task

Please note trainees are only required to achieve the target rating for the specific competency. A full list of the competencies trainees are required to work towards is available in the competencies folder on Geni.



Signing off competencies and ways of working

Trainees are required to work towards the competencies during the Scheme and will be expected to achieve a particular level of competencies at each review point.

At the start of the placement, it is recommended that placement managers review the competencies and support the trainee to identify the most appropriate competencies to work towards. It is the responsibility of the trainee to work towards them, but trainees may need support in developing a plan and identifying other colleagues that may be able to assist them, particularly at the start of each placement. Many of the competencies should be achieved naturally through the placement but there are likely to be some competencies that require engagement with other parts of the organisation or involvement in specific projects to help achieve a particular competency.

Top tip

Many trainees find it useful to record their progress on Excel and then transfer the information across to Geni.

For each competency, trainees are required to write a paragraph outlining the scenario, their contribution and how it evidences the competency. The level of detail required will increase with the grading of the competency. An example is shown below:

The competency: 2.2.2 - Communicates effectively with patients, their families and carers, including complaints handling

Trainee comments: I investigated a complaint raised within the xxx business unit. This has involved reviewing the complaint, taking statements from staff involved, producing a report outlining the key issues and lessons learnt, and creating an action plan. In this case the claimant had requested to have no further communication with the hospital staff but to ensure the issues were investigated and lessons learnt were shared with the wider team.

Manager Comments In a very short space of time xx built relationships enabling xx to communicate effectively at varying levels both internal and external to the xxx. xx has confidently dealt with investing complaints and used xx relationships and communication to resolve concerns or queries. xxx has providing communication/information inputting into complaints led by the xxx.

Each placement manager will be responsible for discussing and reviewing the information provided and then signing off the competency on Geni. It is recommended that placement managers have a dedicated meeting regarding competencies in advance of the probationary/performance review to ensure competencies are up to date.

Please note trainees must achieve 15% of their competencies by their final probation review.

Section 1

The competencies within the 'Personal Qualities' section 1 needs to be signed off after the completion of a reflective piece of work by trainees during their last twelve months on the Scheme. For further details on how trainees should complete section 1, is available in Geni.

Recording achievement of competencies on Geni

How to mark a competency as achieved

1. Open the relevant competency section on Geni.
2. Find the specific competency and select the second box which states 'click here to enter your rating and comment'.
3. Enter manager comments and select the appropriate rating.

If the competency has previously been scored by another placement manager but was not achieved, you can adjust the rating.

1. Click into the first managers box and adjust the rating.
2. Add your additional comments in the third box which states 'click here to enter a second manager's comments'.

A YouTube video is also available through [this link](#).

Further information

Further information can be found by logging into Geni and selecting the link below:

- [Competencies and Probation/Performance Reviews](#)

Flexi

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- Role of programme manager 43
- Timeframes 44
- Signing off flexi placement on Geni 44
- After the flexi placement and what to do on Geni 45

Overview

This is a trainee led placement which provides an opportunity for each trainee to spend 8 weeks in an organisation of their choice and can be NHS or non-NHS. Trainees will have the chance to broaden their technical experience in a different setting and learn transferable skills that can be brought back into the NHS.

To achieve maximum value, there are no constraints on the type of organisation in which flexi placements may take place, and trainees are encouraged to research and set up their own flexi placements. A range of centrally organised placements are also available for trainees to apply for with organisations such as Deloitte, PPL Consultancy, and the Department for Health, however places are limited.

Role of programme manager

Programme managers are responsible for supporting the flexi placement process and providing advice to trainees where necessary, as well as ensuring flexi placement guidelines are followed (see [appendix 8](#)). A draft proposal should be completed on Geni and submitted to the programme manager outlining key learning objectives and the value to the NHS. The programme/placement manager will feedback on draft proposals and provide additional input and support. The proposal should have:

- a strong focus on the trainee's personal development plan and specialism competencies, highlighting their personal objectives
- exhibit transferable knowledge and learning back to an NHS environment

Once approved by the programme manager, the regional Leadership Academy will assure the flexi placement. The trainee may be required to provide a presentation or present to the regional Leadership Academy their learning objectives as part of the assurance process.

Timeframes

Below is an approximate timeframe for the submission and approval of flexi placement proposals listed as months prior to the trainee starting the placement.

5 months prior to starting flexi
draft proposal to be uploaded onto Geni

3 months prior to starting flexi
programme manager to sign off flexi placement proposal

2 months prior to starting flexi
regional Leadership Academy to sign off flexi proposal
(and review flexi presentations if required)

flexi placement commences

Signing off flexi placements on Geni

Trainees are required to upload a draft proposal and any relevant documents onto their Geni record to be approved by their programme manager. A Statement of Commitment and Job Description from the flexi placement organisation are to be included in the proposal as part of the relevant documents. After the programme manager has reviewed these details, they can approve or request amendments from the trainee before a final version is submitted to the regional Leadership Academy.

1. Select flexi placements in the trainee's Geni record, this can be found in the drop down box on the right hand side.
2. Select 'edit flexi placement proposal'.
3. At the bottom of the proposal, update the manager status to approved.
4. Add any additional comments as required.

Once approved, the trainee will notify the regional Leadership Academy for final sign-off before they commence their flexi placement.

After the flexi placement and what to do on Geni

As flexi placement managers do not have access to Geni, they are required to complete a survey to capture the trainee's learning and evidence competencies achieved. Trainees also complete a flexi placement feedback form after the placement.

Trainees will meet with their programme or placement manager within 6 weeks after the completion of the flexi placement, to agree signing off the competencies achieved during this placement period.

Trainees are expected to have a reflective discussion with their programme manager and placement manager highlighting their learning. Trainees will also be expected to share their learning with future cohorts of graduate trainees through a short presentation and Q&A session.

A YouTube video guide to Geni requirements is also available through [this link](#).

Further information

Further information can be found by logging into Geni and selecting the link below:

- [Flexi Placements](#)



General GMTS administration

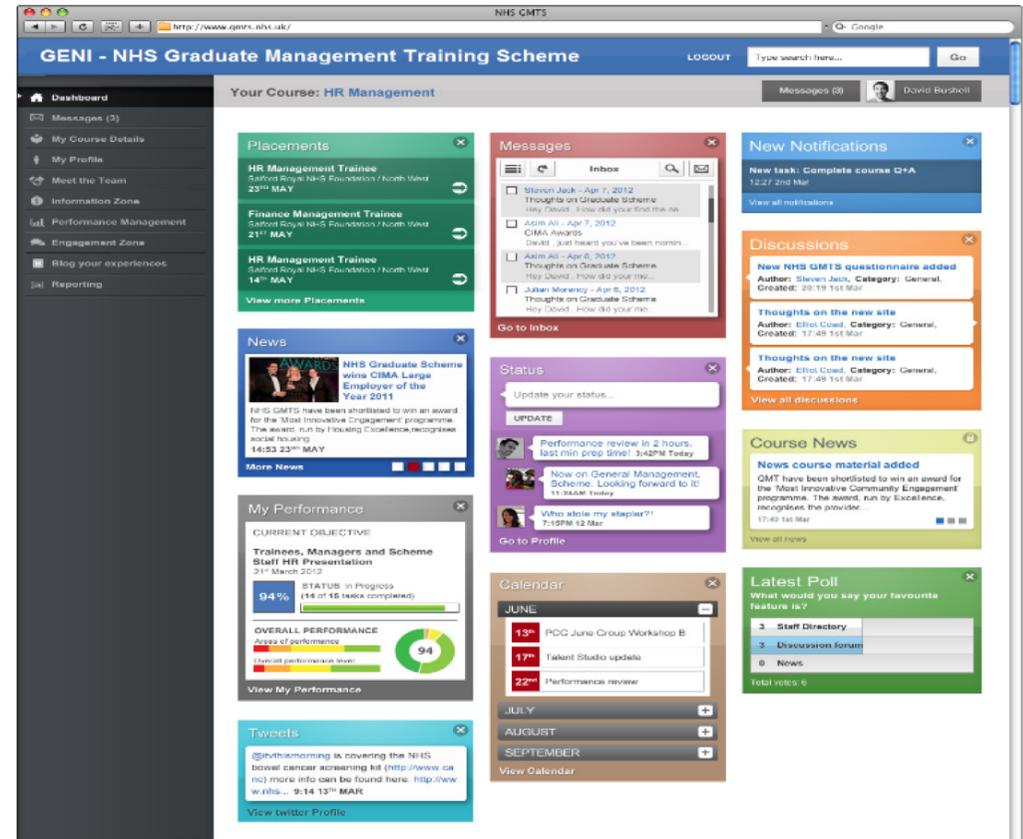
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Geni

Geni is a performance management tool and a one-stop-shop for all important policies and guidance documents.

Geni includes:

- annual leave authorisation
- absence recording
- academic record
- probation reviews information and recording
- performance monitoring information
- employment policies and procedures
- competency information and recording
- manager and trainee online forums
- guidance on flexi placement



Information Zone:

Additional information for the Scheme, education and policies is available in the Information Zone on Geni. The Information Zone can be found via the navigation bar on the left hand side of the screen.

There are a range of [YouTube training materials](#) that you can also access to show you how to use Geni.

Access to Geni / password resets

If you need access to Geni or a password reset, please contact your regional Leadership Academy (see contact details in [appendix 1](#)).

Expenses

Trainees can claim back expenses for travel to education and Scheme related events in line with our Expenses Policy. Expenses for orientation and costs incurred during the placement are funded by the placement organisation.

In advance of a trainee submitting a claim to GMTS, placement managers will need to complete a Manager Signatory Form and will be required to authorise any expense claims during the placement. We ask that all eligible trainees to apply for a 16-25/26-30 railcard and encourage trainees who frequently travel in London to apply for an Oyster card. These can be claimed back through the GMTS Expenses Form. Trainees are also able to apply for a season rail ticket loan.

A copy of the Expenses Policy, Manager Signatory Form and Expense Form and a populated example are available on Geni.

Placement managers will also need to set up trainees to be able to claim expenses from their host organisation in line with their own expenses policy. If expenses cannot be covered due to variations in policy, please liaise with your regional Leadership Academy or TSM for further advice.

Recording annual leave on Geni

Geni is used to record annual leave. It is a trainee's responsibility to inform managers that a request has been made on Geni so you can then log on, review, and authorise appropriately. The system does not automatically notify if a request has been made. Please note annual leave should not be authorised if a trainee has education as education is a mandatory component of GMTS.

1. Select the annual leave page from the drop down box on the right hand side.
2. Select 'edit' for the leave request.
3. Review the request and change the authorisation status as appropriate.
4. Select 'save' at the bottom of the page.

Note: If a trainee wishes to cancel annual leave once approved, placement managers will be required to action this. Please follow steps 1 and 2 above and select 'delete leave' at the bottom right hand corner before saving.

A YouTube video is also available through [this link](#).

Recording absence

All absences should be recorded on Geni from the first day of absence. Trainees and managers should work together to ensure that absence is logged and authorised appropriately as outlined in the absence reporting flowchart see [appendix 9](#).

Managers should not authorise the absence on Geni until the trainee has returned, to ensure the end date is accurately record.

Please also ensure that only 1 absence is recorded per period and weekends are counted in the absence even if a trainee's work pattern is Monday to Friday.

For example:

- if a trainee is absent Monday to Friday in week 1 and Monday and Tuesday in week 2, the absence should be counted as 9 calendar days
- if the trainee was fit to return to work on Sunday of week 1, 6 days absence should be recorded

How to authorise an absence on Geni

1. Click on the absence page.
2. Click on 'edit' for the absence request.
3. Update the end date and change authorisation status as appropriate and add any comments if required.
4. Confirm if medical certificate is received.
5. Select 'save'.

In cases of continued absence, the trainee should contact their placement manager and trainee support manager again on day 4 to provide an update on well-being. For absences over 7 days, please see additional guidance and next steps in the Attendance Policy on Geni.

A YouTube video is also available through this [link](#).

Changes in programme and placement managers

For any programme and placement manager changes, please email your regional Leadership Academy and copy in your TSM and Graduate Enquiries. The regional Leadership Academy will update the relevant Geni records.

Additional employment

The GMTS training scheme is demanding for trainees therefore trainees should not undertake additional employment during their time on the Scheme. There can be some exceptions to this however there should be no conflict of interest between trainee, NHSBSA (host employer) and GMTS. Trainees considering additional employment should contact their TSM for further guidance.

Pay uplifts

Trainees will receive a pay uplift of 5% after successfully completing their first year (and for Finance trainees, a further uplift is payable at the end of year 2).

Policies and procedures

All policies and procedures relating to GMTS are available in the Information Zone on Geni.

Conferences

Whilst trainees are on the Scheme, they can apply to attend 1 conference that will be funded by GMTS. Applications may be made on the condition that key performance criteria are met. Trainees must ensure they are up to date with all components and have an exemplary performance record. The trainee must be able to demonstrate how attendance at a conference would contribute to their personal development plan. This opportunity will become available after the first 6 months on the Scheme.

Further information can be found in the Conference Guidelines document on Geni.

Programme changes

Trainees are not able to move regions, placements, or specialisms unless there are exceptional circumstances, as arrangements are already in place with our education providers and host organisations. If you have any concerns regarding the placement, please liaise with your regional Leadership Academy so they can provide additional support and advice.

Professional memberships

Professional memberships will be funded whilst trainees are on the Scheme. Professional memberships are as follows:

Specialism	Membership	Arrangements
General Management	Institute of Health and Social Care Management (IHSCM)	arranged and funded by GMTS
Human Resources	Chartered Institute of Personnel and Development (CIPD)	co-ordinated and funded via the university provider
Finance	Healthcare Financial Management Association (HFMA) Chartered Institute of Public Finance and Accounting (CIPFA)	arranged and funded by GMTS for the duration of the Scheme
Health Informatics	British Computer Society (BCS)	arranged and funded by GMTS

Payment process

Organisations who would like to host trainees are required to pay a contribution of £24,000 (£26,000 in the case of Health Analysis and Policy and Strategy workstreams) per trainee towards the total cost of the duration of their time on the Scheme. This will be invoiced in an agreed schedule of payments and will be pro-rata by financial year.

An example billing schedule in the case of a trainee starting in September would be:

Financial Year	Months covered	Invoice amount
1	Sept – Mar	£7,000
2	April – Mar	£12,000
3	Mar – Aug	£5,000

The lead host organisation commits to the financial contribution of each trainee. It is the responsibility of lead host organisations to negotiate and recoup any costs to be apportioned to partnering organisation(s).

Once a trainee starts in their placement, the financially responsible person at the lead host organisation, as listed on the application to host a trainee form, will be contacted by the GMTS invoice team. The lead host organisation will be asked to:

- complete and return a Memorandum of Understanding (MoU) as provided by the GMTS invoicing team
- provide a Purchase Order (PO) number to the GMTS invoicing team for either:
 - the value of the amount to be invoiced for that period; or
 - the total value of £24,000 to cover the full lifecycle of the trainee

Please note, the GMTS invoicing team will only be able to invoice as per the above schedule example. **It is not possible to invoice the full £24,000 when the trainee starts the Scheme.** Please contact your regional Leadership Academy GMTS team if you would like to discuss this further.

It is important to ensure that should the financially responsible person change for any reason, the GMTS invoicing team, and/or your regional GMTS team are updated with new contact details to avoid delays to the invoicing process. **Failure to pay the contribution may affect future applications to host trainees within the organisation.**

Further information

Further information can be found by logging into Geni and selecting the links below:

- [Scheme Wraparound and Support](#)
- [Policies](#)
- [Competencies and Probation/Performance Reviews](#)



Support

Support available for programme and placement managers

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- Regional networks 56

Support available for trainees 57

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- Graduate Enquiries 58
- Health and wellbeing 59
- Trainee Engagement Steering Group (TESG) 59

Regional Leadership Academies

Should you have any questions regarding GMTS or need any support please contact your regional Leadership Academy:

Region	Contact Emails
East of England	eoel@leadershipacademy.nhs.uk
London	graduateenquiries.lase@leadershipacademy.nhs.uk
Midlands	midlands@leadershipacademy.nhs.uk
North East & Yorkshire	England.gmts.ney@nhs.net
North West	NWLA.GMTSNW@nhs.net
South East	gmts.sell@leadershipacademy.nhs.uk
South West	Leadership.sw@leadershipacademy.nhs.uk

Support is also available from your TSM, further details are included in the section below 'Support available for trainees'.

If you are a new placement manager you may also wish to buddy up with another manager, for support. Please contact your regional team and they can assist you via the regional network.

Training for programme and placement managers

All programme and placement managers should attend a training session to ensure they are familiar with the requirements of the Scheme, the processes that need to be undertaken and how to support their trainee.

Training sessions run monthly and last approximately 2-3 hours. To book onto a session please contact your regional Leadership Academy.

There are also a range of video resources that are available to support you as detailed below:

- Geni - [Login & forgotten password](#)
- Geni - [Logging in](#)
- Geni - [Dashboard](#)
- Geni - [My profile - Navigating your trainee's profile](#)
- Geni - [My profile - How to edit your profile](#)
- Geni - [User tab](#)
- Geni - [My trainees and Information Zone](#)
- Geni - [Annual leave](#)
- Geni - [Absence](#)
- Geni - [Competencies](#)
- Geni - [Probation and performance reviews](#)
- Geni - [Academic record](#)
- Geni - [My documents](#)
- Geni - [Flexi placements](#)
- Geni - [Surveys](#)

Regional networks

Regional networks are in place for you to connect with other programme and placement managers. This may include regional meetings and communications to ensure you are up to date with Scheme arrangements.

Support available for trainees

The chart below outlines the people and organisations that will be involved with the GMTS programme and are available for support.

Programme manager

- they have overarching responsibility for trainees throughout the entirety of the Scheme
- can help trainees build a network
- support with additional development experiences during the Scheme

Placement manager

- they have day to day responsibility for trainees during the placement, including operational elements such as signing off annual leave and travel expenses
- support trainees in achieving and signing off competencies
- they also support trainees with their personal development plan

Trainee support manager (TSM)

- the first point of contact for trainees and provide pastoral support
- they work with trainees and placement managers to ensure trainees are supported to achieve all GMTS milestones
- typically, regionally based TSMs work directly with the national team and support academic education alongside the education coordinators. They also work in partnership with regional GMTS /Leadership Academy teams

National Leadership Academy

- they have oversight of the Scheme and co-ordinate, manage and implement national induction, academic education, and Experiential Learning and Action Learning Sets
- ensures policies and systems are monitored
- education coordinators will plan Experiential Learning, EGA events (meeting set up only) and support the Action Learning Set facilitators. They monitor educational attainment, Experiential Learning attendance, and plan, and manage the Graduation events

Continued on next page

Regional Leadership Academy

- the regional GMTS teams ensure that placements are quality assured to provide excellent development
 - they support induction of trainees to the region and work closely with regional TSMs to support trainees through all milestones of the Scheme
-

Buddy

- usually, a current trainee from an earlier cohort
 - a buddy can help trainees build a network
 - provide advice and informal peer support
-

Trainee support managers (TSMs)

TSMs are the first point of contact for trainees, they provide pastoral support throughout the programme and work with trainees to ensure they achieve all GMTS milestones.

Each trainee will have a minimum of 1 review per placement with their TSM, however support is available according to individual needs. Trainees and placement managers should contact TSMs if there are any concerns, changes in circumstances or if support is required.

Graduate Enquiries

Trainees with any general questions, should contact our central team by emailing graduateenquiries@leadershipacademy.nhs.uk. We will aim to respond within 3 working days.

Health and wellbeing

A range of support is available for trainees during the programme this includes reasonable adjustments, access to occupational health, and support for wellbeing. Health and wellbeing support is also available through their education providers.

For further information please refer to the following documents and talk to your TSM for further advice:

- GMTS and wellbeing guide - includes resources and apps that are available to trainees
- Employee Assistance Programme – a 24/7 free and confidential service including a telephone helpline, debt management, legal support, emotional support, counselling, health, and wellbeing

Trainee Engagement Steering Group (TESG)

Our Trainee Engagement Steering Group acts as a link between all trainees and the Leadership Academy. It provides a forum for open discussion and delivering improvements to the Scheme. The membership of TESG consists of a group of representatives covering all regions and specialisms for each cohort. Additionally, a representative from the Leadership Academy and each of the Trainee Voice Working Groups are invited to attend. Some interested alumni or trainees may also attend.

The Trainee Voice Working Groups and their subgroups are open-invite groups for trainees, by trainees. They may also invite alumni or Leadership Academy representation. TESG invites expressions of interest to become representatives from each cohort shortly after they join the Scheme.

Further information

Further information can be found by logging into Geni and selecting the following links:

- [Scheme Wraparound and Support](#)
- [Health and Wellbeing](#)
- [Trainee Engagement Steering Group \(TESG\)](#)

Education

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- Education dates 63
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- Study leave 65
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Education components

All education and training providers will work collaboratively with the NHS Leadership Academy during the Scheme. Attendance at all education, Experiential Learning and Action Learnings Sets is mandatory for trainees

All trainees will complete the following elements:

General education (all trainees)

Elizabeth Garrett Anderson Postgraduate Certificate in Healthcare Leadership (EGA) University of Birmingham

A Postgraduate Certificate (or Diploma for GM trainees) in Healthcare Leadership through the Elizabeth Garrett Anderson (EGA) Programme. All trainees undertake modules 1-3 alongside their specialism education in their first year and are awarded a postgraduate certificate upon completion.

Experiential Learning (EL)

The process of learning and making meaning from direct experience and reflection of doing. Rather than coming and listening to lectures, trainees can expect their Experiential Learning modules to use simulations, games, and other interactive events to help them learn. They undertake 5 Experiential Learning modules (each module lasts 1-3 days). Experiential Learning (EL) is provided by the NHS Leadership Academy and their trained facilitators.

Action Learning Sets (ALS)

All trainees take part in 9 multi-disciplinary Action Learning Sets (ALS), they also take part in Inquiry and Application Groups (IAG) as part of the EGA programme. Action learning is a process whereby people study their own actions and experience to improve performance. These groups provide a space for trainees to support each other with any problems or concerns.

Continued on next page

Specialism education

Elizabeth Garrett Anderson Postgraduate Diploma in Healthcare Leadership (EGA) University of Birmingham	General Management trainees will continue their EGA course and to complete modules 4-6 for their second year. Trainees will achieve a postgraduate diploma upon completion of the requisite 6 modules.
Postgraduate Diploma in Human Resource Management De Montfort University	Modules include Managing Organisational Change, Human Resource Management in Legal Context, and Investigating Business Issues from an HR Perspective. After graduating from GMTS, trainees will become a qualified member of the Chartered Institute of Personnel and Development (CIPD)
Chartered Institute of Public and Finance Accountancy CIPFA	Trainees will study for 12 modules, including Management Accounting and Financial Accounting, Audit and Assurance, Company Financial Reporting and Financial Management. Trainees complete 4 modules in year 1, 6 modules in year 2 and a further 2 modules and the submission of a CIPFA portfolio in year 3. In general exams are completed in June and December.
Postgraduate Diploma in Health Data Analysis University College London	Trainees complete 8 modules and can select some modules based on their area of interest. Modules include Health Data Analysis Principles, Statistical Methods for Health Data Analytics, Machine Learning in Health Care, Patient Safety and Clinical Risk, and Key Principles of Health Economics.
Postgraduate Diploma in Health Informatics University College London	Trainees complete 8 modules and can select some modules based on their area of interest. Modules include Essentials of Informatics for Healthcare Systems, Principles of Health Data Analytics and Health Information Systems and Technologies.
Postgraduate Diploma in Health Policy Imperial College	Trainees complete 7 modules, and all modules are fixed. These include Health Systems and Policy, Financing Healthcare, and Innovation in Healthcare (subject to change in line with Imperial College London syllabus).

Supporting your trainee with education

It is the trainee's responsibility to plan and manage the education requirements of the Scheme, however they may need some support from programme and placement managers for some elements. For EGA in year 1, trainees will be required to complete patient observations and complete a team Affinity activity. Trainees not working in clinical areas may need support in linking in with relevant departments or organisations and support from their team to complete the required activities.

In addition to the education days, trainees will be required to undertake a substantial amount of additional reading, research or learning activities as part of their professional qualifications. Placement managers are advised to discuss the programme requirements with their trainee, so they understand how the education is mapped out across the year.

There are a significant number of study days for those trainees undertaking CIPFA qualifications, therefore these need to be balanced with work requirements. Finance trainees will also be required to complete a CIPFA evidence portfolio in the second half of their programme, therefore support in signing evidence as part of this submission will be required.

Education dates

All education dates are set by the education providers and trainees will be informed about their dates directly by them, according to their schedule for distributing timetables. These dates are subject to university timetabling and are not under GMTS control. Trainees are required to share them with you so you know when they will be out of the office. As is standard in all higher education, trainees will only get 1 term or 1 year calendars at a time.

Please note, due to academic timetabling there will be some months which have a significantly higher number of education days.

The below table is a guide as to how many days trainees will be expected to be out of the office for GMTS education, this will be in addition to self-study and assignment/ exam preparation. Please note these are an indication only and are subject to change as education providers update their delivery/modules.

All GMTS trainees

EGA postgraduate certificate

- 1x 3-day EGA residential in year 1 plus Inquiry and Application Groups (IAG) and tutor sessions

Experiential Learning

- Experiential Learning takes place over 12 days, split out into:
- Year 1: module 1 (3 days), module 2 (3 days), module 3 (2 days)
- Year 2: module 4 (1 day), module 5 (2 days)

Action Learning Sets

- ALS takes place over 9 full days, falling roughly every 2-3 months from December in year 1 (these dates are planned by trainees and their ALS facilitator)

Specialism education

General Management

- 2x 3-day residential in year 2 plus Inquiry and Application Groups (IAG) and tutor sessions

HR

- 3-day induction and module 1 residential in year 1
- 3x 2-day module residential in year 1
- 3x 2-day module residential in year 2

Finance

- 1x module teaching date per module per week. Any resit dates needed by trainees would fall January-March and July-September. Trainees take 2 modules per term in Year 1 (4 modules in total), 3 modules per term in year 2 (6 modules in total) and then a final 2 modules in their final 6 months on the Scheme

Health Informatics, Health Analysis

- 2-day residential falling roughly every 2 months from November in year 1. Year 2 residential to be confirmed
- HA/HI trainees may also have optional modules that they can take which may have face to face learning attached – trainees will be able to advise you of these dates depending on their choices

Policy and Strategy

- 1 induction day, 2x 2-day residential in year 1 plus additional sessions (additional residential in year 2 to be confirmed)

Education results

Academic results will come directly to trainees from their provider. Trainees are responsible for sharing their results with you and they are required to upload their results onto their Geni record.

Trainees are required to successfully complete all education elements to participate on the GMTS programme. Trainees should report to the Education Team and their TSM any assignment or exam fails who will work with the trainee to identify any additional support required. Should a trainee fail more than 1 assignment or exam, the GMTS Academic and Scheme Failure Policy will guide our next steps.

Study leave

GMTS is a fast-track leadership development programme and will require trainees to complete aspects of the learning programme in their own time. The GMTS education commitments will require regular evening and/or weekend time. Trainees are encouraged to seek support from their Buddy, TSM and academic tutors, who can offer advice on how to be successful with revision and time management.

Placement managers may provide trainees with some time as part of their working week for study, however this is at their discretion and will be subject to the requirements of the organisation.

Study leave will be provided to some of the specialisms for exams; the academic calendar and study leave guidance details what trainees are entitled to. Additional study leave can also be organised locally with placement and programme managers in line with the organisation's policy should additional time be required; this also needs to be agreed with your TSM and will be decided on a case-by-case basis.

Academic support

Academic support can be sought from tutors, placement and programme managers, TSMs, and GMTS education coordinators.

For general enquiries such as the education administration, accessing the providers online portal, support with assignments, exam registration queries, trainees should liaise directly with the relevant provider for advice. For additional support with academic administration trainees are requested to contact Graduate Enquiries.

If you or your trainee has any concerns or needs support regarding education or workload, please contact your TSM for further advice.

Conversions to master's courses

For trainees on the General Management, Human Resources, Health Informatics, Health Analysis, Policy and Strategy specialisms, there is scope to convert the postgraduate diploma into a master's qualification should trainees wish to do so. This conversion is not funded by the NHS Leadership Academy and is completed after a trainee has left the Scheme.

Further information

Further information can be found by logging into Geni and selecting the links below:

- [Specialism folders](#)
- [Calendars, Groupings, and Key Dates](#)
- [Study Leave Guidance and FAQs](#)

Preparing to leave GMTS

- Career support within placements 68
- Careers portal 68
- Leaving the Scheme 68
- Graduation requirements 69

Careers support within placements

In the last 6 months of the Scheme trainees will start to consider their career plans and potential job opportunities. It is helpful for trainees if both placement and programme managers can support this process through discussion, encouraging networking and assisting them to develop their personal development plan in line with their career aspirations.

Careers portal

Once the Experiential Learning programme is completed, trainees will be given access to a GMTS online Careers Portal which includes a range of careers tools and resources. Resources include career planning, preparing CV's, interview techniques, creating an elevator pitch, and aptitude tests.

Leaving the Scheme

Trainees are required to provide a month's notice of their leaving date. If a trainee's proposed leaving date is within the final 3 months of their contract they will automatically be supported to graduate if they have successfully achieved all the graduation requirements.

Graduation requirements

To formally graduate and become GMTS alumni, trainees must meet the following criteria:

Graduation requirements

Successfully undertaken a range of placements leading to specialist knowledge of their profession.

90% of competencies fully achieved and signed off on Geni.

Have completed and passed the Elizabeth Garrett Anderson programme in line with Scheme and university guidance (to postgraduate diploma level for General Management and postgraduate certificate level for all other streams) and achieved a postgraduate diploma in their chosen specialism.

Satisfactorily met all components of the final performance review (competencies / conduct / work objectives / academic attainment) and be recommended for graduation by the placement / programme manager. All previous performance reviews should be completed and recorded.

Have a personal development plan in place for the next 12 months upon leaving the Scheme.

Satisfactory attendance and participation as deemed such by the National Office in Action Learning Sets and Experiential Learning modules (non-attendance due to illness or approved by National Office does not prevent graduation).

An up to date Geni portfolio (performance reviews/competencies/education/flexi placement).

Remained on the Scheme with 3 months or less remaining on their contract unless agreed otherwise via an approved Early Leaver's Business Case.

Further information

Further information can be found by logging into Geni and selecting the link below:

- [Graduation and Leaving the Scheme](#)

Appendix 1

GMTS contacts

Region	Contact Emails	Twitter
East of England	eoel@leadershipacademy.nhs.uk	@eoelleadership
London	graduateenquiries.lase@leadershipacademy.nhs.uk	@NHSLLA
Midlands	midlands@leadershipacademy.nhs.uk	@NHSMidsLLL
North East & Yorkshire	England.gmts.ney@nhs.net	@NEYLAcademy
North West	NWLA.GMTSNW@nhs.net	@nhsnwla
South East	gmts.sell@leadershipacademy.nhs.uk	@SELA_NHS
South West	Leadership.sw@leadershipacademy.nhs.uk	@NHS_SWLA

National social media

National GMTS social media channels are as follows:



[@NHSGradScheme](#)



facebook.com/NHSGraduateScheme/



[@nhsgraduatescheme](#)

Appendix 2 - Orientation best practice and additional guidance

Best practice

- ✓ Always include a contact name and number and meeting place in your plan. The trainee has all the information to reschedule if needed.
- ✓ Emphasise patient journey and pathways.
- ✓ Build in learning through participation for example, helping on a ward, interacting with patients, answering calls.
- ✓ Plan meetings with key people so the trainee will have a chance to network. Try and structure these meetings so the trainee can learn from the leadership journey of a senior colleague.
- ✓ If you have multiple trainees in a system, consider grouping them for some orientation activities - they can support each other and discuss their experience.
- ✓ Allowing time for reflection. An afternoon a week from week 2 can help a trainee optimise their experience.
- ✓ Encourage trainees to design part of their own orientation. Leave about 4 days for them to plan themselves, towards the end of the orientation period. If your trainee already works for the NHS, they may wish to design more of this experience for themselves.
- ✓ Balance of operational and strategic elements - encourage your trainee to meet staff at all levels from porters to the CEO. Networking is a key skill for trainees, so it is important for them to meet senior staff as well.
- ✓ Have one-to-ones with your trainee in this period if possible.
- ✓ Look for the most varied experiences possible, avoiding repeat days in the same setting or with the same care group.
- ✓ Consider whether trainees can host each other at different organisations in the same system. Networking with each other is a key skill and supports learning.

Manager and trainee feedback suggest that the following elements may be best avoided or used sparingly

- ✘ Large meetings can be of value - but consider how much of the information discussed will be accessible to a trainee new to the NHS.
- ✘ Too many gaps or downtime in early weeks.
- ✘ Making the plan too specialism specific.
- ✘ Meetings with senior staff right at the beginning of the orientation period. Plan these for the end of your 20 days so the trainee has plenty to discuss.
- ✘ Making assumptions about transport arrangements for a trainee. Contact them in advance and check if they are a driver or will be taking public transport.
- ✘ Staff not expecting a trainee when they come in. Maybe ask the trainee to email all the contacts on their orientation plan at the start to introduce themselves and flag where operational pressures may require a change of plan.
- ✘ Too many long events. New trainees are taking on a lot of new information so perhaps limit their attendance to part of an event.



The following activities are ideas for you to consider when planning the orientation programme. You should also consider your system and its providers including primary care, community, mental health commissioning, social care, and the voluntary sector.

- accident and emergency allyship session
- ambulance service
- care home visit
- care of the elderly ward
- chaplaincy
- children's unit
- contact centre - outpatients
- departmental induction
- endoscopy / bowel cancer screening
- equality awareness session
- facilities management
- GP practice visit
- harm free panel
- health informatics
- health visitor meeting
- HMP prison
- hospice tour
- hospital site tour
- infection control
- learning disabilities teams
- medical records
- meet an HCA
- meet the Director for Community Services
- meet the Chief Executive
- meet the Chief Medical Officer
- meet with Associate Director Clinical Governance
- meeting the Director of Nursing
- nursing teams
- rehab centre
- mortuary
- night shift in accident and emergency
- nutrition
- obstetrics / gynaecology
- patient advice and liaison service (PALS) and complaints
- pathology - labs and admin
- patient and family shadowing
- patient experience group meeting
- pharmacy
- porter's shadowing
- practice education facilitator (PEF) team
- prescribing teams
- quality improvement meeting
- rota coordination
- Schwartz round
- senior management team meeting
- serious incident panel
- shadowing another trainee
- social prescribing
- specialist oncology
- sterile services
- theatres
- Trust induction
- Trust onboarding day
- voluntary or community groups visit
- volunteer services
- ward round
- winter care plan board
- work with the projects team

Appendix 3

Checklist - getting to know your trainee

In advance of the trainee starting, the programme and / or placement manager should arrange an introductory meeting. Below are some suggestions of topics you may wish to discuss.

Trainee information	✓
What are the trainee's skills and experience?	
What knowledge of NHS and the specialism do they have?	
Do they have any previous work experience (including NHS)?	
Placement information	✓
Provide an overview of the role and the team	
Information on the organisation	
Provide an outline of their role and a copy of the job description	
Outline what they can expect in the initial few weeks	
Discuss orientation and any requests for activities	
Practical arrangements	✓
Is the trainee relocating and do they need support?	
Outline working arrangements (hours, location, travel between sites, parking)	
Equipment arrangements (if applicable)	
What additional support or reasonable adjustments do they require? (link to occupational health report if appropriate)	
Outline any remote working arrangements – how they will connect with the team, practical arrangements e.g., desk, chair etc.	
Additional Trust requirements e.g., honorary contract	

Checklist - preparing for your trainee

Trainee arrangements	✓
Orientation plan in place and sent to regional Leadership Academy	
Honorary contract in place (if required)	
IT equipment available from start date	
Site / building access	
IT/ email access	
ESR record set up (if required)	
Job description sent to regional Leadership Academy and trainee	
Team informed of trainee's role	
Set up for claiming expenses in place	
Local Induction and policies	
Relevant internal risk assessments (e.g., Covid risk assessment, DSE/ workstation assessment)	

Appendix 4 - Role descriptions

Programme Manager role description

Outline of role

The programme manager has overarching responsibility for the trainee and his/her experience throughout the Scheme. They offer consistency and guidance to trainees during their placements. The programme manager acts as a first point of contact for the trainee to escalate any concerns or issues regarding their placement and education and they will also offer guidance and support for trainees throughout the Scheme. The programme manager cannot be the placement manager of a trainee.

Key responsibilities

- work closely with both trainee, placement manager in the placement setting to ensure the trainee is meeting competencies and gaining the right level of experience in his/her placement
- be accountable in line with the organisations statement of commitment for the trainee during their placement, ensuring the placement matches the statement
- take a supporting role in ensuring the positive health and wellbeing of trainees and signposting any issues appropriately
- work closely with the regional GMTS lead to highlight any issues/risks with the placement
- meet regularly with the trainee at least once a month face to face to spend time updating the trainee's competencies and ensuring work targets are on track and achievable
- work with the placement manger to ensure that work objectives are achievable and stretching for the trainee and that they are fully supported to achieve them
- work with the regional leads to identify the best placement managers who model excellence in leadership
- take on overarching responsibility for the performance management of trainees and provide feedback to placement managers and trainees where necessary
- ensure quality of placements for trainees and manage the performance of the placement manager where necessary
- monitor and update Geni with progress and undertake performance reviews and sign off competencies in the absence of the placement manager
- work with the trainee to identify suitable flexi placement options and develop a suitable proposal for sign off

- support the trainee to source a mentor outside of the host organisation and in line with guidance on mentorship
- work with and support the trainee and regional lead to identify a suitable second placement and support the organisation through the accreditation process offering guidance
- proactively champion the trainee through own networks and encourage networking opportunities
- seek local development opportunities for the trainee
- keep up to date with the Scheme policy and guidance and work collaboratively with the GMTS local leads
- work with the trainee as they begin their journey from the Scheme into substantive posts, scoping out opportunities and career advice
- stay up to date with Leadership Academy and NHS policy and changes
- support the trainees with first line pastoral care and support the trainees to become resilient leaders

Essential criteria include:

- extensive leadership experience
- not be the trainee's placement manager
- working at band 8a or above
- have capacity to fulfil the role outline above
- be well networked and connected
- coaching/mentoring skills
- extensive skills and experience of developing people
- use evidence based and best practice in learning and development
- evidence of proactively sponsoring and championing people

Requirements of the role are:

- attend programme and placement manager training locally
- take an active role in the programme manager network (currently being developed)
- regular face to face meetings with the trainee and regular informal check ins

Placement Manager role description

Outline of role

The placement manager is essentially the line manager for the trainee during a placement and is an expert in developing fast track learners. The placement manager role is an essential and crucial role in the successful development of trainees as they have day to day responsibility for the trainee and their development. The role will work in partnership with the programme manager to ensure that the trainee receives a high quality placement which has key learning and development opportunities and fully supports the trainee to meet their competencies and utilise their educational learning within the placement. The placement manager will ensure that the trainee is given stretching placement which enables them to meet core competencies and offers opportunities and exposure to broader learning to enable them to become rounded individuals who can lead people regardless of speciality.

Key responsibilities

- to work in line with the ethos and values of the NHS Leadership Academy and to promote the value in excellent leadership which is diverse and inclusive
- be accountable in line with the organisations statement of commitment for the trainee during their placement, ensuring the placement matches the statement
- to be an exemplar of good leadership and to be an active role model for trainees
- to offer opportunity and exposure to trainees across the organisation and wider networks
- work with the programme manager to offer a broad and varied orientation to the NHS (1st year trainees only)
- successfully induct the trainee into the organisation and team/s
- provide day to day expertise and support to the trainee
- be available to the trainee and agree to meet regularly (at least every 2 weeks) for 1:1 face to face meetings
- appraise and give both positive and constructive feedback where necessary
- review progress and against learning objectives and competencies and complete performance reviews and update the online platform Geni in a timely manner
- enable a safe environment for trainees to learn and explore
- identify learning opportunities for trainees to be able to put theory into practice
- work in partnership with the programme manager and have regular catch ups and updates regarding the trainee's overall progress
- monitor and update the performance management online tool (Geni) with progress and undertake performance reviews and sign off competencies, absence, and annual leave
- ensure that trainees meet core competencies and that their work stretches them and is not restricted to just these
- support the trainees to develop their own self-awareness and emotional intelligence

Essential criteria include:

- working at a band 8a or above
- must be working in the same specialism field as the trainee
- cannot also be the trainee's programme manager
- a wealth of experience of developing fast track learners and meeting their needs
- demonstrate interpersonal skills, empathy, and emotional intelligence
- a good working knowledge of the GMTS and understand the expectations and intended outcomes of trainees
- demonstrable leadership qualities and experience of leading and developing people
- extensive leadership experience
- have capacity to fulfil the role outline above
- be well networked and connected
- use evidence based and best practice in learning and development
- evidence of proactively sponsoring and championing people

Requirements of the role include:

- attend placement manager training locally
- take an active role in the placement manager network (currently being developed)
- regular face to face meetings with the trainee and regular informal check ins Partnership working and regular catch ups with the trainee's programme manager

Appendix 5 - Probationary review template

Attendees:

Date:

Location:

Review element	Comments
Performance objectives	
Specialism competencies	
Conduct	
Attendance expectations	
Academic attainment	
Personal development and continuing professional development	
If any areas require improvement, please provide details below	
Where concerns have been identified, please summarise how these will be addressed during the remaining period of probation	
Summarise the trainee's performance and progress over the period	
Recognition of achievements and progress made	
Agreed actions	
Trainee's comments	

Please note: a word version of this form is available on [Geni](#).

Appendix 6 - Scheme summary

The information below can be shared with colleagues within your organisation and team to provide an overview of the Scheme and understand the role of your GMTS trainee.

Overview

GMTS provides fast-track leadership development for trainees across 6 different specialisms:

- **General Management**
- **Human Resources**
- **Health Analysis**
- **Finance**
- **Policy and Strategy**
- **Health Analysis**

The duration of the Scheme is 2 years for all specialisms except Finance. The Finance specialism is 2 years and 6 months due to an extended academic component.

GMTS programme

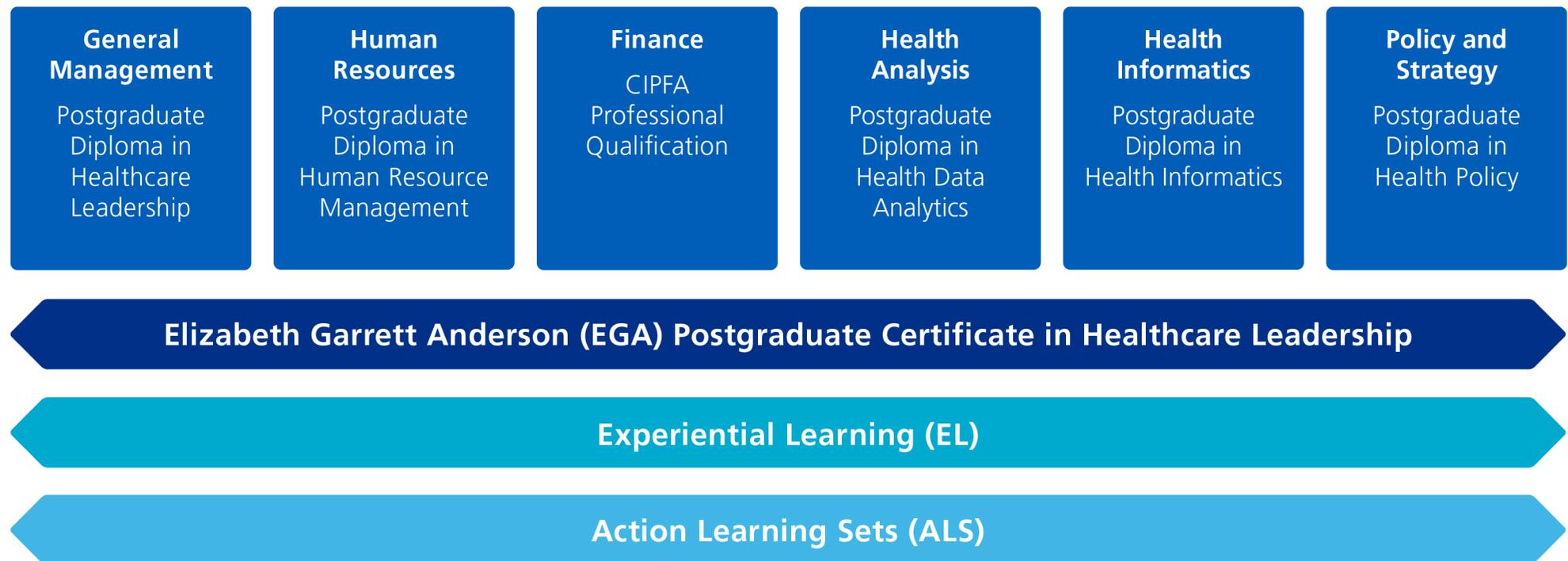
All trainees undertake a minimum of 3 placements: an operational placement, a strategic placement, and a 2 month flexi placement. During their placements trainees are expected to start undertaking work activities equivalent to band 5 building up to a band 7 role towards the end of the Scheme. On completion, trainees move into band 7 and some 8a posts depending on their level of experience.

Supporting GMTS trainees in their placement

GMTS trainees can provide additional support to a team and provide a significant contribution. They may need support particularly initially with:

- understanding the NHS, how our systems work and NHS acronyms
- the role and understanding work tasks
- feeling connected and part of the team
- help with networking across the organisation

In addition to their placements, trainees complete a range of educational elements shown below, this will require them to be out of the office for a number of days during the programme:



Trainees also work towards achieving a range of competencies mapped to the Leadership Framework, they are required to evidence these throughout the Scheme.

Appendix 7 - One-to-one and role clarity conversation questions

Below are some example questions you may wish to use for your one-to-one conversations and the role clarity conversation with your trainee:

Skills

- Are there any areas/skills you are particularly good at?
- Are there any areas/skills you are particularly interested in?
- Are there any areas/skills you would be looking to develop further whilst on the Scheme?
- What is your previous work experience?

Role/team/expectations

- How clear are you about your new role?
- Are you clear what is expected of you this week... this month... in 3 months' time...?
- Do you know everyone's role within team and who you can go to if you need help?
- What are you looking for from me as a manager/how can I help you to have the best possible experience whilst on the Scheme?
- How are you feeling so far on the Scheme?
- What can you do, or I do this week to help get to know your team a little better?

Development / aspirations

- How confident do you feel?
- Are there any specific areas of training/training courses you are interested in?
- What are your career goals/what are you looking for in a career?
- What are you looking for from the Scheme?
- Are there any specific events or networking opportunities you would be interested in?
- Is there any specific support you require to make the most of the Scheme?
- Who do you need to meet outside of my / your team to help you understand the organisation a little better and build some networks of support? What can I do to help you?

Coaching style questions:

Role clarity:

- Tell me about your role and your responsibilities?
- On a scale of 1-10 how clear are you about your role and what is expected of you? What does it need to be in 1 month... 3 months... 6 months...?
- How do you want to be feeling next week... next month... and in 3 months' time and is this realistic?
- How does your manager... your team... your colleagues see your role?
- What one thing can you do this week to be clearer on your role?

Self-efficacy:

- On a scale of 1-10 how confident do you feel to deliver on what is expected of you?
- How will you know that you are achieving your objectives? Is that realistic? What will you have achieved in 1 month... 3 months... 6 months?
- Tell me about your successes so far ...? What feedback do you need and from whom? Whose feedback is important?
- What support and development do you need to achieve your competencies?

Social team acceptance:

- Tell me about your team?
- On a scale of 1-10 how accepted do you feel within the team?
- What have you done so far to build relationships with your team?
- How do you communicate with your team when you are together and when you are apart?

Knowledge of the organisational culture:

- On a scale of 1-10 how well do you understand how the organisation expects you to lead?
- Tell me about the organisation leadership behaviours?
- What networks do you need to make? What one relationship can you make this week that will help you understand the organisation a little better?
- How does it feel to be working in this organisation?

Appendix 8 - Flexi placement guidelines

Background and aspirations

The GMTS flexi placement provides an opportunity for each trainee to gain experience of an organisation other than their planned NHS accredited work placements.

The aspiration is that the trainee, their chosen specialism, and the wider NHS will benefit from 8 weeks spent in a flexi placement.

For the trainee, the flexi placement will provide personal and professional development that will contribute to the trainee's success on the Scheme and within the NHS. For the NHS, the flexi placement will provide the means of exposure to best practice, innovation, specialism norms, creative industry practices, different styles of management and new business practices, and the transfer of these experiences to benefit the NHS.

To achieve maximum value there are no constraints on the type of organisation in which flexi placement may take place. Hence the trainee and NHS could benefit from a flexi placement in any of the following: other NHS organisations, voluntary sector, independent sector, public sector, or private sector (healthcare related or not). Ideally the placement should be specialism specific - although this is not always the case, for example Finance trainees can sometimes do more general placements to sign off competencies. If you have a valid proposal which justifies the reasons for the placement not being specialism specific this will usually be approved.

Location

All flexi placements should take place in England and placements overseas will not be considered. We assume that the flexi placements will be undertaken in the regional Leadership Academy area in which the trainee is currently placed. However, for trainees who live on the borders of, or outside their area, it may be logistically and economically more viable to find a placement nearer to home. Provided the proposal suggests a sound learning experience and is cost neutral, this would still be considered. Logistics of arranging accommodation for second placements will need to be considered well in advance.

Duration and timing

The timing of the flexi placement for each specialism has been designed to elicit maximum benefit for the trainee in terms of their experience, study timetable and for the NHS in terms of a trainee's ability to transfer learning back to the workplace.

HR/General Management/Finance:

The flexi placement will be strictly 8 weeks for these specialisms. The General Management/HR/Informatics flexi will take place during months 13-14 (i.e., September - October) from the start of the Scheme. For the Finance specialism, the flexi placement will take place between months 22-23 (i.e. June - July). A trainee's choice of placement should be closely linked to their personal development plan (PDP) and contribute to specialism competencies.

Health Analysis/Policy and Strategy/ ICS

The flexi placement for these specialisms will take place during months 15-16 (ie. November - December) from the start of the Scheme.

Practicalities

The flexi placement will be a trainee led and owned experience. Trainees are encouraged to research and set up their own flexi placements. Programme managers are also responsible for supporting this process and providing advice to trainees where necessary, as well as ensuring that the flexi placement guidelines are followed. A draft proposal should be completed on Geni and submitted to the programme manager outlining key learning objectives and the value to the NHS.

The proposal should have:

- a strong focus on the trainee's personal development plan and specialism competencies, highlighting their personal objectives
- exhibit transferable knowledge and learning back to an NHS environment

The programme/placement manager will feedback on draft proposals and provide additional input and support.

Trainees will submit a formal proposal, and this will need to be scrutinised and approved. How this process is conducted is determined locally by the regional Leadership Academy. Please check with your regional Leadership Academy for the local process but these are possibilities:

- a one-to-one discussion with their programme and placement managers
- in-house trust panel comprising senior managers possibly the Director level Sponsor for GMTS
- an external panel convened by the regional Leadership Academy

For details of what arrangements operate in your region please contact your regional Leadership Academy.

The placement proposal should:

- offer excellent learning experience that stretches and challenges
- enhance and build upon their specialism competencies and PDP, which must be clearly identified in the proposal
- provide opportunities to learn new management techniques to ensure that best practice and innovations from other sectors are brought back to the NHS
- explore aspects of Finance, HR, Informatics and General Management and/or healthcare not experienced during first or final placement

Support

The national team and regional Leadership Academy will facilitate trainee access to flexi placement opportunities and support the monitoring of trainee performance.

The sourcing of flexi placements will be trainee led, with guidance from their programme manager and, where needed, their Mentor. The programme manager will support the trainee in identifying suitable placements and will work with the trainee to agree learning and placement objectives. The national office will share an updated contact list of organisations who have hosted trainees in the past and would still be interested in being approached. Flexi placement managers and programme managers will monitor performance and progress against agreed objectives and will feed into the ongoing performance monitoring process.

At the end of the flexi placement, the programme manager will review the feedback and action points arising from discussions between the trainee and flexi placement manager and discuss with the trainee. This will enable the completion of this form and support the trainee to analyse competency gaps in readiness for their final placement.

Funding

The flexi placement must be organised on a zero-cost basis to the NHS. No additional funding will be allocated by the Scheme, and trainees will not be able to use the travel desk to book/travel accommodation or claim back any expenses during their flexi placement. Trainees are therefore encouraged to negotiate funding up front if required with host flexi placement organisations. Flexi placement organisations may be able to provide sponsorship for flexi placements (e.g., accommodation and travel), particularly when the outcome of a trainee's work can benefit that organisation, but this needs to be agreed with the organisation prior to starting the placement and is not a given. Trainees may need to look at a placement closer to home if expenses can't be provided.

High cost living allowance is not payable if a trainee, by exception, enters a HCLA location for the flexi placement. (However, if they already receive a HCLA for a placement, they will retain this during the period of the flexi placement, regardless of where this is based).

The travel desk and expenses can be claimed prior to starting the flexi placement for interviews etc... Although we encourage that initial conversations should be had via telephone/conference call where possible.

Outcomes

During and following the flexi placement, trainees will be required to reflect on their learning and share their experiences within the local regional Leadership Academy area. Trainees will be expected to report on whether the specific objectives were met using the following:

- trainees will complete a feedback questionnaire in week 6 of the flexi placement
- the flexi placement manager will be asked to complete a questionnaire about your trainee's placement (please note-they will not be able to sign off competencies on Geni as they don't have access)
- trainees should keep a record of competencies achieved during the flexi placement, as these will need to be signed off by programme/placement managers once back in placement and the feedback from the flexi-manager discussed
- on their return trainees will make a short presentation to their programme manager and placement manager or other learning forums, where they will share learning on best practice

Trainees will be expected to send their post flexi placement presentations to their regional Leadership Academy to share good practice. Trainees are encouraged to contribute to professional journals.

Centrally organised placements

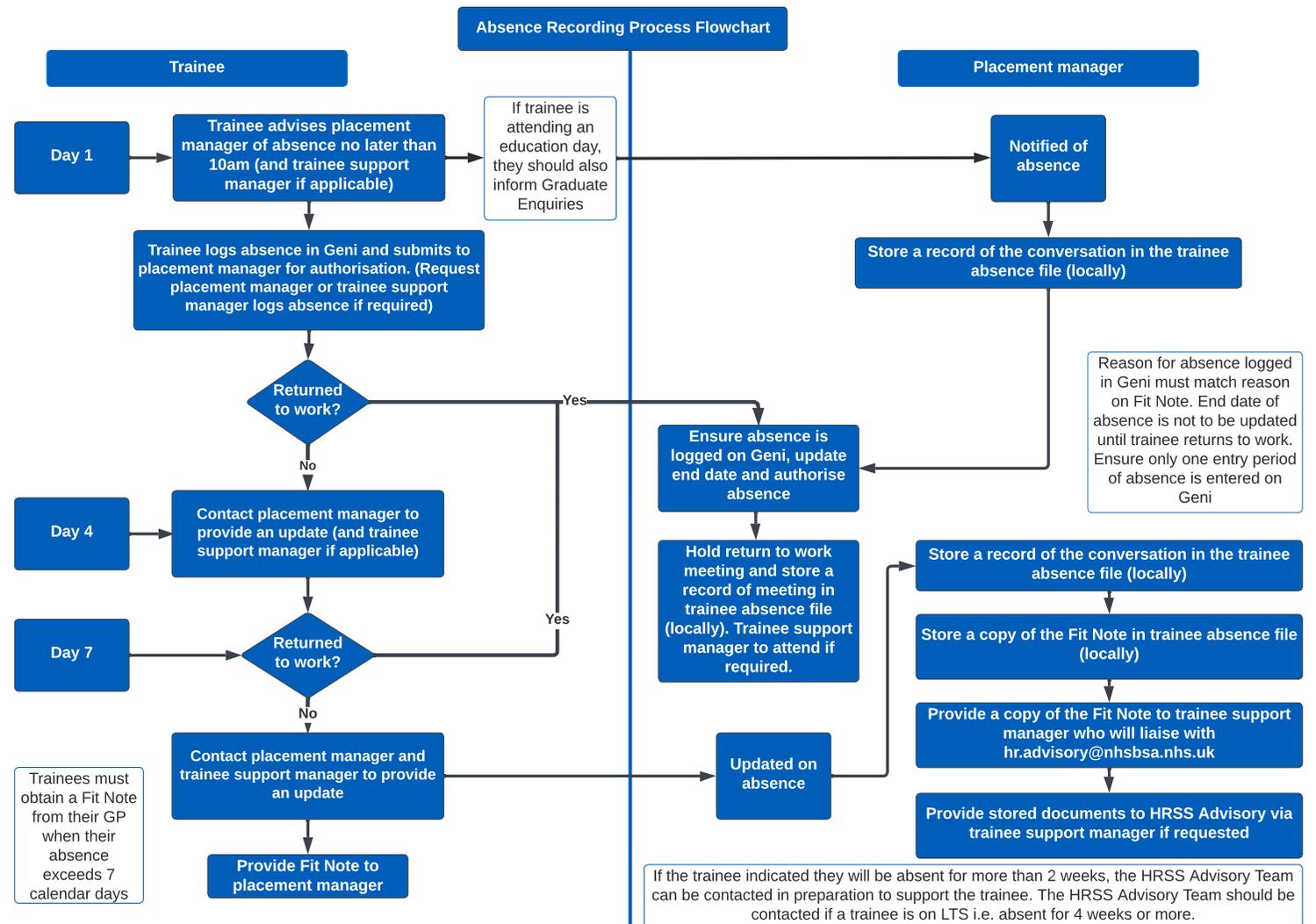
e.g., KPMG, Deloitte, EY, Department of Health vary annually, so the names of centrally organised organisations (and timescale/process) will be shared by the national office for each intake.

Every year we run a limited number of centrally organised placements. They are not seen as more favourable than any other placement, but more so that we can manage and co-ordinate the number of applications as they tend to be very popular. Most of the vacancies are in London or Leeds but some are in the local regions as well. The number of opportunities available will also vary depending on the start date of the flexi placement. Additional information will be provided on who these organisations are by the GMTS national team prior to trainees preparing to organise their flexi placements. To ensure that applications for these flexi placements are dealt with equitably and efficiently additional guidelines are provided below:

- trainees who wish to express an interest in undertaking a flexi placement at these organisations should wait until information on how to apply is circulated along with timelines/processes
- trainees are required to apply for many of these posts by submitting a CV and covering letter, and will be interviewed by these organisations for the post
- being successful with the organisation is the first part of a centrally organised placement. Trainees will still need manager/regional Leadership Academy approval and will need to adhere to their local arrangements for approval before this placement will be confirmed
- applications will either be processed centrally by the national team, or trainees will be advised to send them to a specific contact at the organisation
- these flexi placements like other flexi placements should be organised on a cost neutral basis to the Scheme and any travel/expenses should be negotiated with the organisation in the initial meetings
- trainees should not make direct applications to the centrally organised placements as they will not be considered

Appendix 9

Absence reporting flowchart



Thank you

GMTS would like to thank colleagues and trainees that have supported the development of this handbook including Jennifer Turner and representatives from TESH.

