Embedded Research

Increasing the influence of health services research

# Embedded research resource pack:

## A guide to setting up an ER initiative

**This pack is designed to offer practical tools and tips to help when setting up and supporting an embedded research initiative or recruiting an embedded researcher.**

May 2020

## Contents

## Introduction

The Embedded Programme was a two-and-a-half-year research programme (2018-2020), funded by the Health Services and Delivery Research Programme of the National Institute for Health Research. Its aim was to increase the influence of health services research by studying models of knowledge co-production that involve researchers being embedded in health service settings.

The resources in this pack are aimed at supporting the set-up of, and ongoing support for, an embedded research initiative. Whilst our study has highlighted the variability of embedded research initiatives, we found two consistent 'hallmarks' of embedded research. These were the desire to "embed" the researcher within the health service setting for significant periods of time and a desire to focus on co-producing knowledge and insights that could be used in practice. The variability relates to the degree of embeddedness, individuals involved, nature of and degree of co-production sought, and types of activity undertaken.

This resource pack focuses on enabling those setting up an embedded research initiative to apply the lessons learned during our research in order to create the best possible opportunity for success.

Over the course of the programme we have learned lots about the differences in the design and delivery of embedded research, but we have discovered many common features too - one of which is that embedded researchers are a rare breed. Embedded research initiatives are often complex and changeable, and programmes of work can involve a diverse range of aims, stakeholders and organisations. Embedded research can also present a career risk for those early in their research career, given that it often represents a less traditional research approach.

Given all of the above, those who succeed in embedded researcher roles have to possess a pretty unique skill set: ability to demonstrate strong research rigour while still being flexible enough in their research to accommodate different philosophies, happy working across both visible (and invisible) organisational boundaries and, chameleon like, able to fit in with the different cultures they're working with whilst still managing to remain a 'critical friend'. Most importantly, embedded researchers need to be super communicators - able to explain complex ideas and engage a wide range of people in their research - making it matter to them.

In fact, all things considered, an embedded researcher is a pretty special kind of person. If you're reading this and feeling a bit daunted about how you go about recruiting someone so unique, don't worry - this pack is designed to help you.

As well as some useful pointers and things for you to consider ahead of recruiting your researcher, we've also included some generic resources such as two sample job adverts, a sample job description and person specification, a set of questions to help you design your research initiative and some pointers to organisations that may support the training and development of your embedded researcher/s. Our research has shown that embedded research can take many different forms, across many different organisations and in acknowledgement of this diversity of approach the contents of this pack are intended to offer ideas and suggestions rather than definitive approaches. Please feel free to download editable copies of all materials from the resources section of the Embedded Programme website, and to personalise and edit as you wish.

Finally, if you've stumbled across this pack by accident and you want to learn more about the Embedded Programme, and embedded research more generally, you can find lots of information and resources (including downloadable copies of the resources in this pack) on the Embedded website.

## Embedded researchers: Who and what are they?

We've grouped the skill sets found in embedded researchers into four themes; functional activities, researcher skills and expertise, relational roles and learning mechanisms.

When thinking about the programme of work, and the researcher you are trying to recruit, considering which of these are relevant to you and the aims of your programme is key.

Whilst not everything needs to be nailed down if there are elements which perhaps haven't been scoped or decided upon it's worth noting these and being mindful of them - our research shows that, given the changeable nature of embedded research programmes, any areas of ambiguity may result in tension later down the line - particularly if expectations or accountabilities are not clear.

### 1. Functional Activities

Embedded researchers must be comfortable with a broad portfolio of work, and a variety of activities within that work. Examples we found included; building relationships, collecting and analysing data, facilitating educational activities, participating in meetings and having the project management skills to plan, manage and lead their own work. No matter how well written the job description is, these activities are often quite fluid and will evolve with the piece of work. An embedded researcher needs to be comfortable with this emergent nature. As a recruiting manager, you might want to think about how you foster any training and development opportunities to help develop some of these skills in your newly recruited researcher.

### 2. Researcher skill and expertise

These can be defined into three broad categories:

- **Topic specific skills** relate to any clinical or practice-related issue that the embedded research initiative might focus on (e.g. diabetes, neuro-rehabilitation or childhood obesity). Not all embedded initiatives will require topic specific skills, but it is worth identifying early on if this topic specialism will be an important part of the success of an embedded researcher in your programme.
- **Methodological skills** relate to the research "know-how" of the embedded researcher. Skills in this category include being able to define and refine the focus of the knowledge creation activity, collecting and analysing data and producing knowledge of different kinds.
- **Interpersonal skills and expertise** include the facilitation skills, communication skills, relationship building skills and emotional intelligence that will make your embedded researcher successful in programmes that are complex, have multiple stakeholders and often rely on being able to build relationships quickly.

### 3. Relational roles

This theme is about acknowledging the embedded nature of the research. Embedded researchers will play different roles in different organisations, depending on the subject of their research. Some researchers may offer a fresh pair of eyes and a new way of seeing things. Others might provide an additional pair of hands, producing knowledge and evidence to drive the organisations' processes and activities. They could also offer specialist or expert advice. They may do just one of these things, or they

may do all three, at different stages of the programme. It is also worth highlighting the role of an embedded researcher as a 'critical friend' and the importance of maintaining a critical stance towards the health setting.

Their success in doing this will depend on a number of relational factors including the extent to which an embedded researcher views themselves (or are viewed by others) as insiders or outsiders in the health setting, the degree of flexibility and control they had over their work (including disseminating findings) and the extent to which they were able to access spaces within the health organisation. Relatively simple logistical arrangements such as the employing organisation, and how easily researchers were able to access space within a health organisation can impact on these factors, and is worth bearing in mind as you design your programme of work.

### 4. Learning mechanisms

Embedded research initiatives make use of a variety of mechanisms to learn about how things are going and whether they are achieving their intended outcomes. Ambiguity about the aims and objectives of an embedded programme will make this measurement hard.

NHS or other health service organisations tend to make use of performance monitoring mechanisms including key performance indicators and annual performance reviews, whereas those that are funded and/or controlled by organisations with a strong research focus tend to make use of formal evaluations.

Other programmes may use more informal mechanisms for learning and reflection, such as group or individual supervision, team meetings, workshops and learning sets.

Depending on your programme of work, your embedded researcher will need to be comfortable with the ways in which you are intending to track progress and will play a key part in ensuring this progress is tracked.

## Questions to consider when designing an embedded research initiative

You can find out more about the research which has informed the development of these questions on the embedded programme website. These are intended as prompts to help you in the design of your programme, but also to create the most optimal conditions for your researcher, and your programme, to thrive.

| Theme | Questions to consider |
|---|---|
| Intended Outcomes | What type and scale of knowledge will the initiative produce?<br><br>What is the scale of the problem which the initiative will tackle?<br><br>What types of capability and capacity will the initiative support?<br><br>Whose capability and capacity will be increased?<br><br>What markers of credibility or prestige will the initiative generate? |
| Power dynamics | Which aspects of the initiative will be controlled by whom?<br><br>Who will contribute to the initiative and what will their contribution be?<br><br>Who will benefit from the initiative and what will they gain?<br><br>How will the initiative affect the traditional roles of those who are involved? |
| Scale | How many projects or pieces of work will the initiative encompass?<br><br>How long will the initiative need to last to accomplish the intended outcomes?<br><br>Does the timescale need to be fixed?<br><br>How many researchers will be involved? |
| Involvement | Who is affected by the issues being addressed and/or activities being undertaken within the initiative?<br><br>How involved should each group of people be?<br><br>When should they be involved and for how long? |

| | |
|---|---|
| | What activities will people be involved in?<br><br>What mechanisms will be needed to involve people in the initiative? |
| Proximity | Where (and with whom) will the researchers be located?<br><br>What physical spaces will the researchers have access to?<br><br>What proportion of their time will the researchers spend in the healthcare organisation?<br><br>Will the intensity of their contact vary across the initiative?<br><br>How visible will the researchers be to different parts of the healthcare organisation? |
| Belonging | What boundaries will the embedded researcher need to cross?<br><br>How will the researcher be supported to cross these boundaries?<br><br>What contractual arrangements will be used to facilitate belonging for the researcher?<br><br>What informal arrangements will be used to facilitate belonging for the researcher? |
| Functional activities | What type of activities will the researcher need to undertake?<br><br>Is the proposed range of activities feasible?<br><br>Will the activities be fixed or emergent?<br><br>What is the purpose and focus of the activities?<br><br>What training and support will the researcher need to receive? |
| Skill and expertise | What topic specific skills and expertise will be required?<br><br>What methodological skills and expertise will be required? |

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| | What interpersonal skills will be required? |
| Relational roles | How interdependent will the researcher and the healthcare organisation be?<br><br>How much flexibility and control will the researcher have over their work?<br><br>What stance will the researcher need to adopt and how will they be supported to maintain that stance?<br><br>What type of input will the researcher be required to provide?<br><br>Learning mechanisms:<br><br>What mechanisms will be required to monitor the initiative's performance and targets?<br><br>What methods will be required to evaluate whether the initiative has achieved its outcomes?<br><br>How will learning and reflection take place within the initiative?<br><br>What approaches will be required to develop and adapt the initiative? |

## Helping an embedded researcher thrive

If you're at the point where you are planning to recruit a researcher, you probably already have a pretty clear idea of what you want to get out of your initiative and how it will be funded as well as some ideas about the logistical detail on host organisations, line management and even some simple things like where the person is going to sit.

Even if you don't have all of the details worked out yet, our own research has shown that being really clear about some of these arrangements from the outset can make the difference between a highly effective embedded research initiative one which doesn't flourish. Common tensions arising during the lifespan of an embedded initiative come from issues such as; differing expectations of the researcher role, and piece of work as a whole; lack of clarity about evaluating success, and what represents value for money for those who have funded these sometimes complex and time intensive initiatives; a sense of loneliness or lack of belonging for the researcher, who may be perceived as an outsider by both the academic and health organisations they're working in.

If you're still working out some of the details of the initiative you can find lots of information on what to consider when designing an embedded programme on the embedded website, and we have included a longer list of prompts in the "resources" section of this pack. But if you're ready to recruit a researcher we've created a handy checklist of our absolute must dos before you post that job advert below.

- **Aims and objectives:** Are you as clear as you can be about the aims and objectives of the piece of research? Do you understand the purpose of your piece of work, and is that understanding shared across all partners? Do you know how you intend to measure performance over the course of the work?
- **Sponsorship:** There will potentially be a tension between academic and service needs. Is there a senior individual in each area of work who can sponsor the Embedded Researcher to ensure this is a positive tension?
- **Management:** Do you have a clear understanding of, and clear agreement for, the management for this individual - particularly if they will be a joint appointment or be in a post that is jointly funded by more than one organisation or funding stream. Are you clear on the logistics of a joint appointment - who will offer performance feedback, support and coaching both in the programme's objectives but also for the academic career of the researcher? Will the researcher have sustainable employment over the long term and which employer they are best employed by so they can 'speak truth to power' if the research results are not as expected?
- **Belonging:** How will you support the researcher to become part of their respective teams in each organisation they work in becoming part of the team, how will you support them in their handover between teams.
- **Scope & Boundaries:** Do you have a clear idea of the scope of the piece of work and the activities that you want the researcher to carry out? Are you clear about the accountabilities within the role, and the expectations you have of the researcher and the piece of work? Is a blended team more suitable to what you want to achieve rather than an individual researcher?
- **Introduction and support:** Have you thought about how you will introduce them to, and integrate them with the team? Embedded researchers often have to walk a difficult line between gaining the trust of the team and remaining objective about their research, how will you support them in this? In addition, because they are often trying to blend the worlds of research and practice there can be a real challenge with their sense of belonging - feeling that

they don't quite fit in either world. How will you introduce them, and what support can you offer them in their role as this will be instrumental in helping the embedded researcher to thrive.

- **Training and development:** As already touched upon, embedded researchers need to possess a number of skills and often need to navigate complicated organisational and professional situations. For an individual to thrive in this role you should consider how you can support their ongoing professional development. We have included a more detailed list of the sorts of training that might help an embedded researcher thrive in the resources section of this pack and some information on organisations that could provide this training.

## Resources

We have used our research to create some resources that may help you in your journey to recruit an embedded researcher. In this section you will find guidance on developing a training and personal development plan which you might consider putting in place once you have recruited the researcher, as well as a generic job description and person specification, and two draft adverts. All these resources are open source, and you can find downloadable resources versions on our website.

### Training and personal development plan

We have already talked about the portfolio of skills that an embedded researcher needs to make them successful in their role. These skills and personal attributes should form part of the continuous professional development of these individuals.

A large proportion of embedded researchers will be hosted across more than one organisation, as the role bringing together research and practice probably means joint funding. Two top tips for managing personal development in this situation are.

- ensure that performance and development needs are discussed regularly with the individual researcher by both organisations they work in i.e. the academic and service organisation
- produce a shared development plan which is owned by the researcher, and recognised by both organisations

We have drawn on our conversations with many different embedded researchers, and those running research programmes to pull together a list of suggested development activities. This list is intended to act as a list of possible options employers might aim to deliver for the researcher and could form part of their ongoing development (alongside other personally identified development needs). It goes without saying that this list is not exhaustive!

**Core skills development**

- Communication and listening skills
- Presentation skills
- Personal resilience
- Service evaluation
- Quality Improvement activities
- Patient and Public Involvement techniques
- Budget management
- Developing networks across boundaries
- Research programme specific knowledge (e.g. integrating care systems, building a nursing research network etc)
- Writing and submitting research grant applications
- Writing for a variety of journals – academic and service journals

**Optional activities include**

- Action learning set facilitation
- Coaching tools and techniques

This training may be delivered from a variety of sources - we have listed some suggestions in the resources section of this pack.

## Job advert

You will probably want to write a job advert yourself, which is tailored to your organisations and the programme of research you are planning to deliver. We have drafted a couple of options to provide inspiration below - feel free to simply copy and paste from this pack if they work for you.

**Option 1**

We are looking for an Embedded Researcher to support applied research and make a difference to changing our research culture from an optional extra to part of core service delivery

The successful candidate will need to be a researcher with a track record of working with the NHS and/or local government and/or voluntary sector. They will need to be independent, resilient and innovative and have exceptional influencing skills and have experience of developing funding applications for high quality research in close collaboration with health/ care/ voluntary (delete as appropriate) staff and managers. They will be a critical companion, diplomatically challenging staff' assumptions and ideas and answering their questions with a sensitive approach.

Being 'embedded' within the service setting, increases the potential for well-designed research, applied directly to the context in which solutions will be adopted, to facilitate successful implementation and improve health and care for service users. This model allows researchers and health and care staff to understand and value each other's roles, knowledge and approaches and to develop their complementary skills. The team will undertake research of value both to (insert title) organisation and the wider health and care sector.

This is a fantastic opportunity for a highly applied health services or social science researcher to make a practical contribution to improving service user/ patient care. The embedded researcher's role is to both mobilise established evidence and to create new knowledge through pragmatic evaluation.

The role is wide ranging, and the successful applicant will be expected to negotiate their contribution to the research initiative once in post and to agree a role with the partners which is both ambitious and achievable. This is likely to include the following roles:

- Working with and alongside a range of people across organisational boundaries
- Focusing on knowledge and bringing people from completely different disciplines and backgrounds together.
- Being the supportive facilitator between research and practice, making research more accessible to staff as a topic and showing them how they can either use existing research and evidence or

actually create research and evidence themselves

APPLICATIONS PROCEDURE

For an informal discussion about the post please contact [insert name of recruiting manager]

Applications should be completed by [insert link/submission information]

The closing date for applications is [insert closing date]

**Option 2**

Ever felt like you want to be doing something more… applied? Wondered how you could combine your passion for research with the operational knowledge of those working in health service delivery to make stuff … better? Perhaps it felt like you could do more translating theory into practice? Well, we've got some good news for you - we're setting up an embedded research programme, and we're looking to recruit our embedded researcher.

Don't worry if you don't know a lot about embedded research as an approach - we hadn't heard of it either until we saw this video [hyperlink to animation]. But when we did, the lightbulb switched on and we realised this was the thing we had been looking for - a chance to bring research to the front line and to make a real impact, straight away.

But we need to be up front with you; embedded researchers are a rare breed. Some would say unicorn rare. They're passionate about research, having devoted their early career to perfecting their technical skills in research methodology and fund applications. But they also love working with a diverse group of people. They're brilliant at communicating, and often act as the (diplomatic) critical friend to the services they work with.

Most importantly of all, they care about improving things. They want to bring the rigour of research to the messy world of service delivery and make a difference, to the patients, to the staff and to the system.

If you're reading this and thinking "this sounds interesting" then it's almost certainly worth you pick up the phone and giving us a call to learn more. You may surprise yourself and discover that you're actually a unicorn and you didn't even know it.

For an informal discussion about the post please contact [insert name of recruiting manager]

Applications should be completed by [insert link/submission information]

The closing date for applications is [insert closing date]

## Job Description

Sitting in front of a blank piece of paper to write a job description can be a bit daunting and take a lot of time. We have developed a "long hand" job description, based on a review of a number of different job descriptions and roles held by researchers already working in embedded research initiatives.

This job description is intended as a starting point - we encourage you to personalise it to your research initiative and your organisation as necessary. This may mean removing some sections which are not relevant to your specific initiative. You can download an editable version of this from our website.

| | |
|---|---|
| EMPLOYING ORGANISATION 1 (employment contract): | |
| EMPLOYING ORGANISATION 2 (honorary contract): | |
| ROLE DESCRIPTOR: EMBEDDED RESEARCHER | |
| REMUNERATION | Spine point 38 to 41 |
| RESPONSIBLE TO | *In our experience these jobs are normally organised as a joint contract; the researcher's employment contract may be with the university and an honorary contract may be held with a local authority/ NHS Trust/ care/ vol sector organisation in x department. We have seen different ways to record these arrangements in a job description. As a minimum we recommend clarity over which organisations are involved, and who holds day to day responsibility for the researcher. You may find including an organisational chart with the job description as a good way to describe who the researcher is accountable to. Some examples of language which might be helpful includes;*<br><br>The researcher's employment contract will be with [insert employing organisation] and an honorary contract may be held with [insert partner organisation]<br><br>There will be an assigned workspace in both settings and responsibility to both organisations. |

**JOB SUMMARY:**

The Embedded Researcher will work in close partnership with colleagues in the university, insert x health trust/ x council/ voluntary partner and carry out applied research within [organisation] in collaboration with others. The researcher will add value to the organisation through applied research that makes a difference to service delivery.

The role is flexible and responds to the need of the organisation where the research is taking place.

The post-holder may be supporting people to make choices about how the research needs to be conducted. They will work on site with the delivery partners in [insert NHS/care/voluntary sector organisation location] and an academic base will be physically located in the [insert location of base when in academic institution].

The post-holder will foster collaborations with individuals and groups who are central to the research studies and topics that are pertinent at the time for the organisation. These may include clinicians, service users and managers.

The postholder will facilitate partnerships between academia and service colleagues to combine knowledge in order to improve [insert service specialty] design and/or delivery.

*Each Embedded Research role is unique and will be shaped by the particular organisations that the researcher works for. However, there are some important components that can be anticipated in the role.*

*Components that are likely to feature in most embedded researcher roles include;*

Work with local partners to ensure that service/system transformation is catalysed using applied research

Facilitate collaboration and networking which engages and supports activities that contribute to the research

Undertake and disseminate research

Develop and maintain effective working relationships with a diverse range of internal and external stakeholders

Work closely with [insert name of local AHSN and ARC if appropriate i.e. links established] one of 15 Academic Health Science Networks (AHSN) and/ or Applied Research Collaboration (ARC) in England and the main vehicles for delivering work requiring partnerships between health and care partners and academic institutions

*This list of key relationships is based on the frequently occurring relationships we've seen as part of our work to better understand different types of embedded programmes. These vary according to the programme, and not all will be relevant to the work you're setting up.*

**KEY WORKING RELATIONSHIPS**

- Clinicians e.g. AHPs, doctors, nurses
- Service users/ patients
- Carers/ guardians
- Service managers
- Local government colleagues
- ICS colleagues
- Academic colleagues e.g. Research Dean, Reader, clinical academics
- External Advisors
- Academic lead for the research programme
- Service lead for the research programme
- Academic team colleagues
- Service team colleagues
- Research and Innovation Director
- Methodologists and Statisticians
- Clinical project leads
- Research Governance, ethics and research and development teams

**MAIN DUTIES AND RESPONSIBILITIES**

**Research strategy and delivery**

The Researcher will;

- Develop an agreed research agenda with the employing organisation/system, under the direction of academic and service line managers
- Carry out research as part of the x team, under the direction of academic line manager
- Support others to develop their research/evaluation skills, building research capability and culture within the organisation more broadly
- Co-produce a research programme/ design a programme of work etc
- Liaise closely with other members of the team and staff at [organisation] to contribute to the success of the work of the team
- Review the relevant literatures, depending on the topic of the research undertaken
- Identify and contextualise significant, complex and sensitive issues related to service delivery, which are part of the research programme.

- Develop proposals for external research grant funding, under the direction of academic and service line managers and in collaboration with appropriate [organisation] staff to ensure that appropriate ethical clearance and research governance approvals are obtained for all empirical research activity
- Develop qualitative research instruments
- Lead on/ contribute to the analysis of qualitative data
- Plan and rollout clinically driven research
- Lead on/ assist in the delivery of dissemination activities
- Draft/ supporting drafting of progress reports as required by the PI
- Lead on/ contribute to drafting papers for publication
- Contribute to presenting findings to different audiences and attend relevant conferences
- Liaise with the relevant administrative team for the support of the initiative
- Report progress to Prof [name] and the relevant steering group

**Partnerships and collaboration**

The researcher will;

- Build networks with numerous individuals and groups to contribute to and influence organisational and research strategy
- Nurture effective strategic partnerships to identify changes in the health and care system which may be the topic for applied research
- Liaise with health/ social care/ third sector (delete or add as appropriate) stakeholders on key issues and to understand their work in the context of the research programme

**Organisational leadership**

The researcher will;

- Add value to the organisation through applied research that makes a difference to service delivery
- Foster close working relations with academic colleagues and service colleagues
- Build and support others' professional and personal development (both individuals and teams)
- Act as an advisor and facilitator for organisations who are part of the research study. This could include public health, social care, NHS, local government, charities.
- Ensure confidentiality on all matters and information obtained during the course of employment

**Research design and delivery**

The researcher will be competent in using a range of methods to conduct/ disseminate the research and develop the service such as:

- Capacity and capability building,
- Service evaluation
- Quality Improvement activities

- Training / guiding clinicians/ managers through the different stages of the research process, and then on to publication
- Gaining insights from local practice
- Sharing formal academic knowledge
- Producing knowledge

**Personal development**

The researcher will be committed to their own personal career development and learning and will;

Participate in educational activities as appropriate to the stage of their career

The researcher will also be expected to carry out their own informal learning and reflection to shape their future practice

## Person Specification

What we suggest below is a starting position for you to work from, designed to be a helpful tool rather than the definitive answer.

Each category is classified into Essential =E and Desirable =D, but these classifications should be changed as required for the specific role.

| | |
|---|---|
| **Knowledge/ understanding of:** | |
| The complex inter-relationships in organisations and how to work with these across various interfaces (primary /secondary care; public health / clinical care; commissioning /providers, health / social care). | E |
| How to change a research culture from an optional extra to part of core service delivery | D |
| **Skills/ abilities:** | |
| Ability to quickly absorb new information and research new topics/ build a network to support a requested research programme | E |

| | |
|---|---|
| Knowledge of a range of research methodologies so that these can be adapted and applied to the service | E |
| Strategic thinking to see beyond a presenting situation to underlying causes and research topics | E |
| A methodical and accurate approach to work with attention to detail and a willingness to adapt and innovate | E |
| The highest ethical and professional standards in health service practice, research and education | E |
| **Qualifications / Certification:** | |
| PhD in Health Service Research/social sciences. | D |
| Masters in Health Service Research-related area | E |
| **Experience of:** | |
| Working closely with the health trust/council/ voluntary partners and applying academic expertise to help solve practical problems | E |
| Working across organisational boundaries | E |
| Working with Clinical Trials Units | D |
| Forming complex networks, connections and collaborations | E |
| Continuous and audience-relevant dissemination of knowledge | D |
| Acting as a translator and facilitator for others, enabling accessibility and potential | E |
| Conducting high quality academic research | E |
| Co-creation and co-production of research studies | E |
| Line managing junior staff and/or research supervision | D |
| Using theory in practical situations | E |
| Engaging and managing a wide range of stakeholder groups | E |
| Working both independently and collaboratively | E |

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|---|---|
| Supervising junior staff | D |
| **A track record of:** | |
| Gaining successful research grant funding from external bodies | D |
| Publication in relevant peer-reviewed journals | E |
| Publication in sector-relevant publications | D |
| Delivering projects on time and within budget | E |
| Finding creative means to meet multiple requirements | D |
| **Personal skills and abilities:** | |
| Ability to act as a 'critical friend' and offer a different perspective | E |
| Ability to building capacity and capability and increase credibility of health and care research | E |
| **Communication:** | |
| Excellent interpersonal, oral and written communication skills | E |
| The ability to communicate information in a useful, accessible way | E |
| The ability to write reports clearly and quickly | E |
| **Aptitude:** | |
| Resilient and committed to this way of working | E |
| Diplomacy and positivity to support relationships with a range of colleagues | E |
| Outward-facing and enjoy working with different groups of people, to develop ideas and methods | E |
| Desire to use academic expertise in a practical way | E |

| | |
|---|---|
| Ability to live with ambiguity relating to sense of professional self, i.e. clinician or academic | E |
| Highly self-motivated and hard working | E |
| Commitment to continuous professional development | E |

## Interview process

As these roles can be complex with posts often funded from two or more organisations, the selection process needs to consider the needs of all funding bodies and other relevant stakeholders. This may include PPI groups.

- Invite representation from all funding bodies to be involved in the selection process. This could start with joint agreement of the design of the initiative (see below for questions to help with these discussions) followed by the development of an agreed job description and person specification. At this point line management for the position should be agreed
- If numbers allow, a representative of each funding organisation should be involved in the interview panel. This should be done in a way that allows appropriate gender and ethnicity representation on the panel.
- The person taking line management responsibility for the position should ideally chair the interview panel and ensure clarity on the employing organisation, and the approach to line management and sponsorship from other funding organisations, is explained to interviewees. This will help foster a sense of belonging from the outset.
- Consider involving a public/patient representative on the panel again fostering the importance of this from the outset.
- Develop interview questions based on agreed job specification ensuring focus on testing against essential criteria particularly interpersonal and communication skills.

## Useful Organisations and Further Resources

Below we have listed some organisations that provide development support and information about the various sectors that may be relevant to specific initiatives.

**Resources for finding out about a sector**

The NHS Leadership Academy (at national or local level)

The Kings Fund

The Local Government Association

The National Council for Voluntary Organisations

Universities UK

**Resources for networking with other similar professionals**

Health Education England Library and Knowledge Services