

Together
an Active
Future



Influencing Behaviours

How the **shared role model**
works and how it influences
system change

August 2023



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Key Points

- This report summarises findings from engagement with individuals involved in the TaAF Shared Role model
- Shared roles present a wide range of benefits and challenges to individuals, TaAF, hosts, and the system
- Notably, benefits tend to be more strategic or personal; challenges tend to be more operational. This provides significant scope to tackle challenges.

Enablers

The major enablers of effective shared roles fall under 6 categories:

- Right Role Set-Up
- Right Host-Set-Up
- Shared Objectives & Workstreams
- Level of Seniority/Influence/Autonomy
- Flexible Management Styles
- Visibility/Tangibility of TaAF

Where a role has more enablers, the impact of that role appears to be greater. This is particularly true with regard to ripple effects within hosts. It is therefore crucial to judge every shared role on its own merits, based on the context in which it is operating.

Ripple Effects depend on:

- Start point of host in terms of current WoW, understanding and buy-in
- Seniority/autonomy of person in shared role
- Support within host (line management and wider)
- Clarity on what the role is aiming to achieve

Recommendations

There are a number of areas which TaAF are doing exceptionally well and should be continued or enhanced.

Areas for development include:

- **Planning:** Greater planning around aims of each role and the context in which it will be operating
- **Set-up and management:** Maximise support for individuals in shared roles from both TaAF and host sides
- **Recruitment:** consider risks around open recruitment, diversity of thought and burn out from recruiting 'certain types of people'
- **Financial sustainability:** Retain current focus on the sustainability of impact beyond the lifetime of TaAF funding, including the potential for shared roles elsewhere

1. Introduction

2.1 About Together an Active Future (TaAF)

Together an Active Future (TaAF) is a place based collective of change leaders from different organisations and backgrounds across Pennine Lancashire. By working with partners across systems and places, their aim is to change the way things work to make being active easier for everyone. The approach is built on the core belief that change in behaviours of system partners leads to sustainable change in places.

TaAF emerged in 2017 as one of 12 local delivery pilots, funded by Sport England, who were tasked with transforming the understanding, the value and the delivery of physical activity in their place. To date £10 million in funding has been received and is set to continue to April 2025.

2.2 About the Shared Role model (SRM)

By its very nature, TaAF is more of a movement and a way of working than an organisation. This meant that, from the very beginning, the way it was resourced needed to be different. Back in 2017 when news of the funding award was first received, the bidding team knew they needed to quickly create capacity to get the pilot underway. They also knew that, to be successful, they needed people with strong local relationships, and a deep understanding of *how things work*, in Pennine Lancashire. It needed people and networks that already existed and would still be there long after TaAF.



To meet these criteria, the idea of using a Shared Role model was put forward. Rather than spend months recruiting a brand new team, TaAF would link with key local partners. Experienced colleagues would have the opportunity to be part of the TaAF team for a fixed number of days per week, and TaAF would reimburse the originating organisations (Hosts) for their time, in order that they could backfill capacity.

The model was tried with a few key roles to start, including a strategic lead and programme manager. It soon expanded to include leads for each of the six Pennine Lancashire localities (Figure 1). More roles have come on board over the last few years, along with some full time roles. The TaAF team is now approximately two thirds shared roles and one third full time.

Figure 1: Areas making up Pennine Lancashire

2.3 Is a shared role the same as a secondment?

Whilst there are similarities between shared roles and secondments there are a number of key differences. General guidance¹ suggests that a secondment is typically fulltime for a fixed period (not usually more than 12-months) and can be within the same organisation or in a different one². During

¹ Reed Recruitment Support [What is secondment? \(With benefits\) | Indeed.com UK](#)

² Institute of Employment Studies, Secondments: A review of current research (2004) <https://www.employment-studies.co.uk/system/files/resources/files/mp66.pdf>

that time, the secondees work entirely on projects in the position to which they are seconded. At the end of the fixed term, they return to their original post.

In a TaAF shared role, a person works for TaAF for an agreed number of days per week, whilst in parallel working in their original post for their remaining contracted hours. Overlap between the two roles is expected and, in fact, desirable, with learning and collaboration opportunities from one feeding directly into the other. The initial duration of a shared role is agreed upfront, however, can be more flexible and more open to extension than a secondment.

Examples do exist of secondments elsewhere which are for only part of a person's contracted hours. For example, in its guidance on secondments, the University of Oxford³ states:

"A secondment is in essence a temporary arrangement and therefore typically the duration would not exceed 12 months (with an absolute maximum of 2 years). A secondment may be for as little as a few weeks and may be offered on a part-time basis, whilst the substantive post continues on a reduced basis."

University of Oxford

This does not, however, appear to be the most common practice.

2.4 Report Aims

The model has now been in operation for over 5 years and there has been considerable interest from other parties, including Sport England as the pilot funder. Pennine Lancashire is the only local delivery pilot area to have adopted such a model, and its relative strengths, benefits and challenges are of great interest to other projects. In particular, Sport England is in the process of expanding its place-based work and the model may be applicable to other localities.

Additionally, core to TaAF's way of working is self-reflection and learning. This means they are keen to understand more about how the model is operating in practice, how it is experienced by different members of the team, and how it contributes to system change across the region.

As such, in May 2023, TaAF commissioned Proper Active to support with a piece of research to learn more. The work has a number of aims, as summarised below.

Provide an explanatory account of the distinctive characteristics of the shared role model, including key mechanisms through which it contributes to outcomes.

- What are the experiences, attitudes and beliefs of staff working in a shared role?
- What enables success or presents challenges when working across different organisations?
- Has the model enabled development of individuals working in shared roles?
- Has there been sustainable change in host organisations; who/what is driving that?

Clarify/refine the model longer-term

- Evidence for why/how model is useful for system change/place-based working
- Practical side of HOW to implement that
- How to make the ripple effect of shared roles bigger within host organisations

From the funder perspective, the work should also:

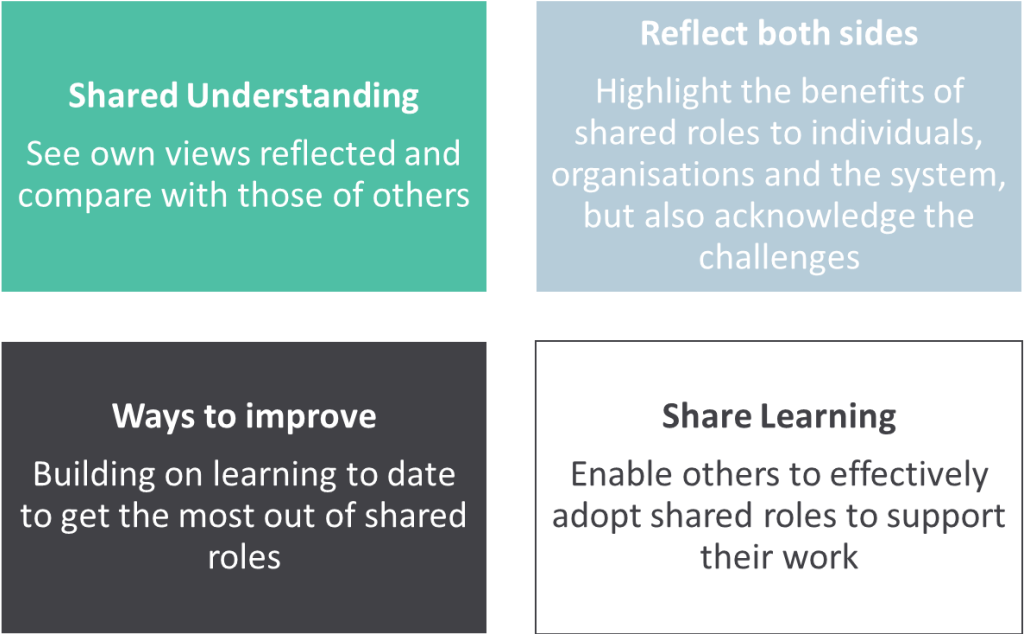
- Capture wider learnings which can be promoted outside Pennine Lancashire to support the use of a similar model in other areas.

³ University of Oxford: Guidance on secondments <https://hr.admin.ox.ac.uk/secondments#collapse1514351>

2.5 What participants want to learn

In supplement to the aims that were agreed for the report, we also asked participants what they would like to learn from the work. Areas of interest spanned four themes, as shown in Figure 2.

Figure 2: Areas of interest to participants



The ability to share the learning beyond TaAF was a particularly strong imperative amongst the core team, and there was a strong desire to support Sport England’s aspirations to understand how shared roles might support their expansion of place-based work.

All stakeholders also saw clear merit in coming back together as a team, including those who had not taken part in interviews, to reflect on findings, explore what they might mean for future practice, and agree any next steps and actions.

“How we can then use this piece of evidence and this piece of research and evaluation to support and provide Sport England with the potential opportunity to say if you want other places to start, to think and experience place-based working, then actually a shared role model could be an option for them to consider.”

2. Methodology

Research took place between June and July 2023 and consisted mainly of qualitative interviews with individuals involved in the Shared Role Model. Additional group discussions were also undertaken at a TaAF team day in June 2023.

3.1 Qualitative Interviews

1:1 interviews were conducted either face-to-face or via Microsoft Teams and lasted for between 1hr and 1.5hrs. It was felt important to speak with those undertaking shared roles and those overseeing them, including line managers within the hosts, to get a broad view of how the model feels from different points of view.

Participants who took part included 6 males and 4 females with a range of roles and seniority. The majority had been involved in TaAF since a very early stage, with several even involved in writing the funding bid. Interview types are summarised in Table 1.

Table 1: Interviews undertaken

Role	Number of Interviews
Programme Lead	1
Strategic Lead	1
Individuals in Shared Roles	5
Host Organisation Line Managers	3

Interviews explored:

- Background to the role
- Working as part of a whole system approach
- Benefits and challenges of shared roles
- Day-to-day practicalities
- Impact and enablers of shared roles

Regular meetings were also held with the TaAF Research Lead to discuss emerging themes and queries.

3.2 TaAF Team Day

An event was held on 11th June 2023 for all TaAF team members to reflect on progress over the last 12-months. Proper Active were able to facilitate a group during a session on cross-cutting themes. The SRM has been identified in previous work (Lancaster University Process Evaluation, 2022) as a key cross-cutting enabler of success for TaAF and fitted well in this context.

The session adopted a World Café approach⁴, whereby participants had the opportunity to rotate between themes of interest. Our group utilised a Rich Picture approach⁵ and covered similar areas to the interviews above. In total we were able to speak with 13 people, a mix of those in shared roles and those working with shared roles, as well as a range of localities and levels of seniority.

⁴ World Café Approach <https://theworldcafe.com/key-concepts-resources/design-principles/>

⁵ Rich Picture Approach <http://systems.open.ac.uk/materials/T552/pages/rich/richAppendix.html>

3. How TaAF use shared roles

4.1 How Shared Roles work

Shared roles came about in TaAF initially as a way to create capacity. When the initial funding award was announced, the bidding team recognised the enormous opportunity for Pennine Lancashire. They knew the importance of assembling a team quickly with the experience, local knowledge and skills, to grasp that opportunity, and shared roles provided an ideal way to do that.

The wider benefit of shared roles to the aims of TaAF soon became apparent, however, and the model has gone from strength to strength and is now an engrained part of the TaAF way of working.

4.1.1 Day-to-day management of roles

- Most shared roles are 2-3 days/week with TaAF and remaining 2-3 with host.
- Host organisations are able to recharge costs for lost resource to TaAF. This is intended to backfill the duties their employee will no longer have time to undertake.
- BwD Council act as the overall 'host' organisation. TaAF funding comes to them from Sport England and they take responsibility for payments to hosts.
- Line management continues by host. No 'line manager' or equivalent within TaAF.
- Monthly meetings take place between TaAF and localities. Additional meetings are arranged between TaAF and host organisations if needed (usually the Programme Manager).
- Payroll, pensions, holidays, performance management, redundancy liability - stay with host.
- As TaAF has grown, some roles (e.g. Evaluation, marketing) are not shared and these individuals have fixed-term contracts directly with BwD Council.

4.1.2 How a new role is created

Recruitment practice in many ways mirrors a standard recruitment process. The main steps which take place are:

1. Need for a shared role identified and role profile agreed
2. Role is advertised
3. Short-listing takes place
4. Interviews take place and person appointed
5. Contract drawn-up and meeting between person, TaAF and host LM to agree next steps, start date etc.
6. Arrangements made for host to recharge costs; host puts in place arrangements for backfill
7. Person starts

In practice, a person has often been identified at an early stage who could be a good fit for a new role. Interviewees described the right person as key; the term 'TaAF person' was used several times.

4.1.3 Practical requirements

In order to operate shared roles, there are a number of key elements that are considered essential, including a number which are required to comply with legal standards. These include:

- Appropriate governance, legal and procurement procedures to manage financial risks and liabilities, including in relation to any funding award.
- Suitable contracts between host organisation and receiving organisation (in this case TaAF)
- A host organisation to own the back-office elements, e.g.

- Contract set-up and management
- Holding funds and making payments
- Providing IT infrastructure
- A governance lead who is responsible for assurance (in this case for SE as the funder and BwD Council as the liable body). Ideally this person should be independent from specific workstreams within the receiving organisation to ensure impartiality in sign-off.
"In the initial 12 month, it was spending an awful lot of time with my legal and procurement colleagues to ensure that those aspects, legal agreements, back-to-back agreements were all in place and that gave the authority [BwD] the confidence from a financial point of view that they weren't exposing themselves to financial risk."
- A strategic lead to guide overall direction of the receiving organisation: link emerging workstreams, and manage external comms, for example, ensuring consistent external messaging, dealing with local partner concerns, keeping funder informed.
- A programme manager to lead on day-to-day operations within the receiving organisation.

In the case of TaAF, the governance lead and the strategic lead are the same person, but this doesn't have to be the case, so long as both roles are fulfilled.

4.1.4 Recommended structures

In addition to essential structures, there are a number of other things referenced by TaAF colleagues which they have learned are valuable in setting-up and managing shared roles

- A shared agreement (written down) on what each party (person, host and TaAF) has committed to and should expect from one another (this is over and above the contract)
- Clear communications around sickness, annual leave, changes to working arrangements etc
- Tools and actions to make people in the new organisation or programme feel like a team

4.1.5 Importance of feeling part of a team

TaAF identified early in their journey that simply signing people up and calling them a team would not be enough to make people feel part of something. Nor would it lead to the spirit of learning and collaboration that they were hoping to harness. It was therefore key to put processes and structures in place which helped to create a shared sense of identity for TaAF.

Some of the steps which TaAF have taken to establish this identity are:

- shared office space
- WhatsApp group
- Tuesday morning everyone in the office
- quarterly away days - work and fun
- quarterly sessions with Sport England where people can come and be honest
- team goal setting sessions.

Participants in the research made reference to these in conversations and particularly valued team days and shared learning spaces.

4.2 Working as part of a system approach

4.2.1 Experience of system working

Experiences of system working prior to TaAF varied amongst stakeholders, as did their description of how they used it now.

- Most said it wasn't completely new to them, with senior leaders more likely to say that they had been working in this way previously (although many noted that they wouldn't necessarily have termed it 'system working').
- When discussing their interpretation of system working, however, there were significant differences between what stakeholders felt this meant.
- Most spoke in broad terms about collaboration and working across organisational boundaries towards shared aims. A few also mentioned it being about those aims being for the good of communities, people, or place, rather than organisations and institutions.
- Many drew parallels with public health work, particularly around exercise referral, and wider integration of exercise into health pathways.
- Some seemed very clear and comfortable with the language of systems and were able to talk about it at length in a number of different contexts.
- Others seemed comfortable within their own work area, but less so with linking to wider workstreams. Examples given in these cases tended to relate to a specific programme or project.
- A minority described broad principles and seemed to struggle with translating those into what that might mean in practice.

"For me it wasn't necessarily new, but I suppose it put a label on it."

The purpose of TaAF was also discussed by stakeholders and centred around 3 main areas.

Changing the system, and mindsets, and how things get done	Working in different ways and trying new things to see what works	Showing the credibility of physical activity & PA orgs to deliver (health) improvements for communities
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Participants spoke about how their ways of thinking and working had changed as a result of TaAF. Many of these had been facilitated by the shared role model, as a result of having a foot in two camps and therefore the ability to see a wider perspective on how things are influenced. One stakeholder spoke strongly about how their whole perspective had been changed over time.

They firstly highlighted the realisation that this wasn't about driving physical activity behaviour change by making better programmes, it was about influencing the way people and organisations work, particularly those who can influence organisational change. They went on to talk about a shift to recognising the need for a completely different approach, working with different partners and settings to embed physical activity into people's daily lives.

"[It is about] changing the system, so that would then result in more people being physically active and I think that gets forgotten about that end bit...and I sometimes struggle to think, how is that resulting in that. I don't always think there's a really clear link."

Stakeholders also talked about the intangible nature of a lot of the work TaAF does, and how it can be challenging to demonstrate impact. There were some concerns raised that this can make it difficult to articulate to wider stakeholders what TaAF is trying to achieve, and also that the core purpose (to get people more active) can sometimes feel lost.

Participants were also asked specifically about systems leadership and the role of system leaders in

TaAF. In the main, stakeholders struggled to distinguish the role of system leaders from the wider system approach of TaAF. The impression was that this was such an inherent part of their day-to-day work that it was difficult to specifically articulate. A number of people did, however, comment on the value of the strengths-based approach which has been adopted by TaAF in helping them to lead effectively.

4. Benefits & Challenges of Shared Roles

Participants highlighted a wide range of benefits of shared roles, and overall, the attitude towards them was very positive. Inevitably, there were downsides, not least due to the nature of working in a complex, multi-stakeholder environment, and participants discussed the impact of these challenges and the ways they find to best manage them.

Both benefits and challenges were felt for individuals, for hosts, for TaAF, and for the system itself, so these have been presented under distinct headings (see also Figure 3 and Figure 4). Interestingly, benefits tended to be more strategic or personal; challenges tended to be more operational.

5.1 Benefits of Shared Roles

5.1.1 Individual

- Opportunity to work more strategically
 - Be a part of something that feels significant for the area, and for PA more generally, something that could really change things
 - Do things they had maybe thought about, thought could make a difference, but not really felt wider appetite or opportunity before.
"joining the system working flock"
- New challenge
 - Do something completely different, really test yourself in new ways with new people
 - For some, ready for a change, been doing same thing for a long time, safe way to try something really different
- Personal growth & learning opportunity
 - new ways of thinking, lots of training opportunities, on the job learning [N.B. This is a feature of all TaAF roles, not just shared roles]
"More CPD in 12 months than 12 years in previous roles"
 - Do things you never thought you could
 - Take learning back to host role
- Protected time to do the new work - a 'project' would mean adding on
- Support from TaAF core team
 - Highly valued – gives people confidence, makes them feel they have 'back-up' to push for change (see 5.1 Right Role Set-up – Right support for person).
 - Can fill a gap where support in host is limited

5.1.2 System

- Places change agents inside organisations which will live beyond TaAF
 - "I'm in that room because of my role...influencing and talking about TaAF work and TaAF principles. TaAF then is accessing rooms where stuff happens that they could never get access to because they're private. They would never open the doors for an external partner."
- connect parts of system you otherwise never could
 - direct reach inside organisations with TaAF acting as a conduit to bring together (e.g. health, leisure, education)

- access to meetings, forums, information, internal processes that you could never get as an external partner
- easier to spread consistent messaging, ideas and language
- Creates genuine capacity for the work for those in positions to influence
 - Giving people the time, support and opportunities to do system change work – in any other context you’d have to ID passionate advocates willing to fit it around their ‘day job’
 - Acted as the catalyst for doing things differently [Although note, different views on extent to which work would continue without TaAF]
 - “best version of co-production”
- Access in-depth local knowledge (links to TaAF benefits of recruiting senior people and accessing pre-existing relationships)
 - Experience and knowledge of local systems and relationships in a way you can't get through collaboration alone.
 - People with specific understanding of the Place who not only understand the challenges being faced, but also how to navigate local bureaucracy.
 - Working with a foot in two camps also brings new thinking into each space

5.1.3 TaAF

- Quicker way to construct an experienced team
 - Particularly key at the outset of TaAF to ‘hit the ground running’
 - Each person brought both their local knowledge and their network of wider relationships
 - These are long-term relationships which otherwise might take years to build.
- Seniority, expertise and experience that might otherwise be hard to recruit
 - There is typically a limited pool of experienced people seeking new roles at any given time.
 - A permanent move to TaAF would have been seen as too risky for many, given the fixed-term nature of the funding award.
- Easier to influence an organisation from the inside
 - The position and level of influence the person had is retained
 - They are still embedded in the host so relationships and knowledge remain strong and up-to-date
- Provides a ‘different hat’ which can reduce competitiveness (this is also a benefit to the system)
 - Allows you a platform to be in certain rooms without people feeling threatened about why you’re there.
- Agility/flexibility in ways of working
 - Opportunity to create your own ethos, work ethic and ways of working
 - Less need for back-office/HR function than if hold full liability
 - Has more potential for continuity than a fixed-term secondment (e.g. easier to extend SR) whilst maintaining flexibility (e.g. not permanent, can negotiate change in number of days)

5.1.4 Hosts

Benefits for hosts were much more varied between different organisations.

Universally recognised benefits were often more functional and practical:

- Direct link to a big new source of capacity/funding/capacity in the area
 - Opportunities for investment in training, new capacity, new programmes [Although note the challenge that some saw this as a pot of new delivery money that they were entitled to a share of – See 5.2 Right Host Set-up]
 - Greater visibility of what is going on in TaAF
- Not losing experienced staff
- Being reimbursed for staff time
 - Commonly organisations are asked to contribute personnel to projects for free which can be difficult to commit resource to
- Individual development for person in shared role
 - The L&D opportunities for those in shared roles was widely acknowledged

As the level of support and commitment for TaAF increased, other benefits emerged. These were generally more fundamental to how an organisation operated and might be considered to be the ripple effects:

- Wider team development
 - Those in shared roles brought new thinking and ways of working back to the team
 - The space they left provided opportunities for other team members to step up and take on new responsibilities, but still benefit from the support and experience of the person in the shared role.
- Changes in how the host organisation operates
 - Brought in learning from TaAF programmes to influence internal decision-making
 - Introduced methods of creative engagement, and internal sharing, e.g. learning pods
 - Stronger relationships with other partners and the community, increased ability to collaborate and co-produce
- Build the awareness and reputation of your organisation/business
 - Some organisations have seen a more positive response to their organisation from the public (e.g. greater loyalty to them during and after covid)
 - Some have raised their profile and grown their reputation amongst other businesses, the voluntary sector, and elected officials
 - Significantly, some have established relationships with new commissioners, and won new work/funding as a result
“Systems change work is not cash negative”
- Being part of something significant that could make a step change for the area
 - A few spoke about how important it was for their organisation to be part of TaAF right from the very beginning. They saw the value and importance straightway.
“I don't think there was any time that we thought we wouldn't be involved, we had to be involved it, it was, it was always something that we were, you know...we saw it as a once, probably, once in a career opportunity to be involved in something so substantial that was important.”

6.1 Challenges of Shared Roles

6.1.1 Individual

- Juggling two roles / workload
 - Mentioned by everyone interviewed in some capacity
 - Some allocated specific days / time to each role, but felt the amount of work/expectation for each was often greater than time available

- For others, their roles felt completely overlapped and the issue was simply one of volume – in system change you can always do more and prioritising can be tricky when everything feels important
 - “you could work 240 hours a week, there is no end to the job”
- Numerous participants spoke about host roles not being backfilled fully, not backfilled from the start, or in one case not backfilled at all
- Several people referenced the challenge of fitting around existing structures and schedules; for example, education calendars, council meetings, host team days, existing sign-off procedures etc; TaAF core team were felt to not always fully appreciate/accommodate this.
- Major peaks in workload can be particularly challenging, particularly when both roles have a peak at the same time, or there are significant activities which take you away from the core work (e.g. monitoring/report, events).
 - “I sometimes envy people who only have 1 thing to think about.”
- Burnout is a major risk “At times it just feel like your brain is mashed”
- Lack of support in host organisation
 - For some people, levels of support within the host were minimal; line managers were not necessarily unsupportive but either didn’t have capacity/influencing position to offer much, or were felt to “not really get TaAF”
 - One person referenced a complete lack of any performance management cycle, and had to set their own goals
 - Wider structures within hosts also made it difficult, for example, hierarchical structures and rules which restricted who could attend certain meetings
 - The sense of being unsupported adds to the risk of burnout, highlighted above
- Competition / distrust between host & TaAF
 - Some host organisations were unclear on the purpose of TaAF which has led to feeling their own position locally is being threatened
 - Can leave person in shared role feeling “stuck in the middle” between host and TaAF
- Not accessing all opportunities they would like
 - A small number of people felt their wider skills and interests were not always seen; this led to not being considered for some opportunities (e.g. training, projects)
 - In certain circumstances people could be left feeling a bit pigeon-holed, or limited in how far they could take their work area
 - This could happen in both the host and TaAF

6.1.2 System

- LT sustainability of the work
 - General agreement that TaAF funding would not last forever; mixed views on the extent of sustainability
 - Where hosts have fully embraced TaAF ways of working, there is more optimism that change would continue if TaAF were to stop
 - Others see this as “the latest model” and expect it to end; when that happens they will pivot again to whatever the next thing is
- Reach only extends as far as the individual's sphere of influence
 - Who a person is connected to is not changed by being in a shared role. Individuals can only work within the network of relationships they have (and seek to expand them where possible, as you would in any role).
 - A person can also only operate at their level of influence – here seniority can be a major asset [See 5.3 Level of Seniority/Autonomy/Influence]
 - Can be difficult to influence across all localities if your roles sits within one
- Risk of echo chamber

- Various people spoke about shared roles (and TaAF roles in general) being best suited to a certain type of person (a “TaAF person”); this risks limiting diversity of thought and breadth of system change [See 4.2.3 Challenges to TaAF and 5.1 Right Role Set-up]

6.1.3 TaAF

- Can feel slower to make progress
 - As team members are part-time, capacity is reduced; although some noted that this only the case for tangible outputs (e.g. delivering X training sessions), whereas the rate of system change was greater with shared roles

“in the short term 2 + 2 is less than four...but as you look towards long term... on how long it takes to build a relationship of trust that actually gets something intangible done... You get there faster...cos I've known you for five years and we trust each other and work together, so something that might have taken a full-time employee ten meetings, I can get done in 10 minutes.”
 - This can be added to when demands are high on the host side – have to accept that people may be pulled back in certain periods
 - The nature of system change also requires a lot of reflection, listening, collaborating etc – this exacerbates the above as it can be easy to lose focus on the big aims when juggling two roles

“It’s often easier to do the easy stuff but you have to make time and do the hard stuff.”
- Best suited to certain type of person (plate spinner/self-starter/senior)
 - Many commented that shared roles work best for people in senior positions, due to their greater influencing power and the higher degree of autonomy this affords
 - Most people commented on shared roles being suited to a certain type of person – good at juggling lots of priorities, high levels of personal commitment, and comfortable with uncertainty and minimal process
 - This risks compromising diversity of thought (linked to system risk of echo chamber)
 - And also recruiting people willing to compromise personal wellbeing and work long hours to satisfy the demands of the role (linked to individual risk of burnout)
- Reliance on co-operation of Host
 - Host need to understand TaAF aims, working as part of a system, and be bought in to the dual aims of the shared role
 - Hosts must provide adequate backfill and ensure only an amount of work appropriate to the shared contract is asked
 - Host are responsible for line management and performance management and this needs to be done well to reflect both roles
 - This makes it more difficult to manage poor performance and, in extreme cases, can make it difficult to end shared roles that aren’t working – this makes line management particularly key
 - Ending a role also risks damage to a strategic partner relationship
- Navigating infrastructure challenges
 - Not having back office functions on occasion comes with challenges, for example, TaAF don't have their own data server

6.1.4 Hosts

- Loss of person's capacity and expertise
 - Biggest and most obvious downside for hosts is the loss of expert capacity

- Hosts need to feel confident that the benefit of their involvement with TaAF will outweigh this significant challenge.
- There have also been instances where those in shared roles have left their host role but continued to work with TaAF
- Loss of key resource particularly challenging for smaller organisations
- Uncertainty about duration
 - Often TaAF roles started for a fixed term but then extended, in some cases more than once. This leaves uncertainty for hosts (and those in backfilled roles) as to how long this arrangement may be in place.
- Financial continuity
 - Reimbursement for the person's time is key for a number of organisations.
 - This presents a particular risk to financial models for those most committed to TaAF who have made changes in how they work
 - Some also felt, whilst they'd love to maintain new ways of working, this would not be possible to the same extent without TaAF funding

Figure 3: Benefits of a Shared Role

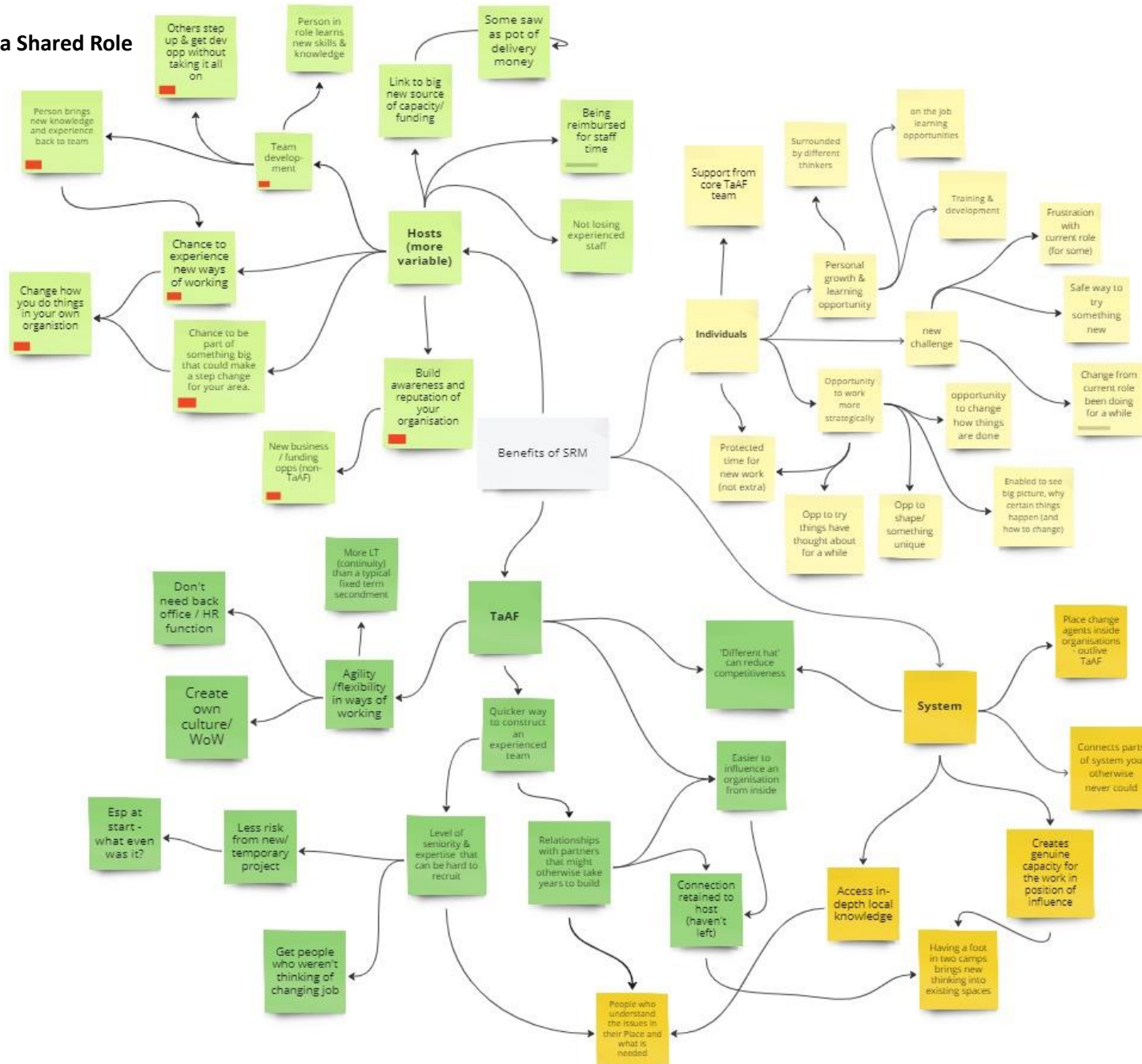
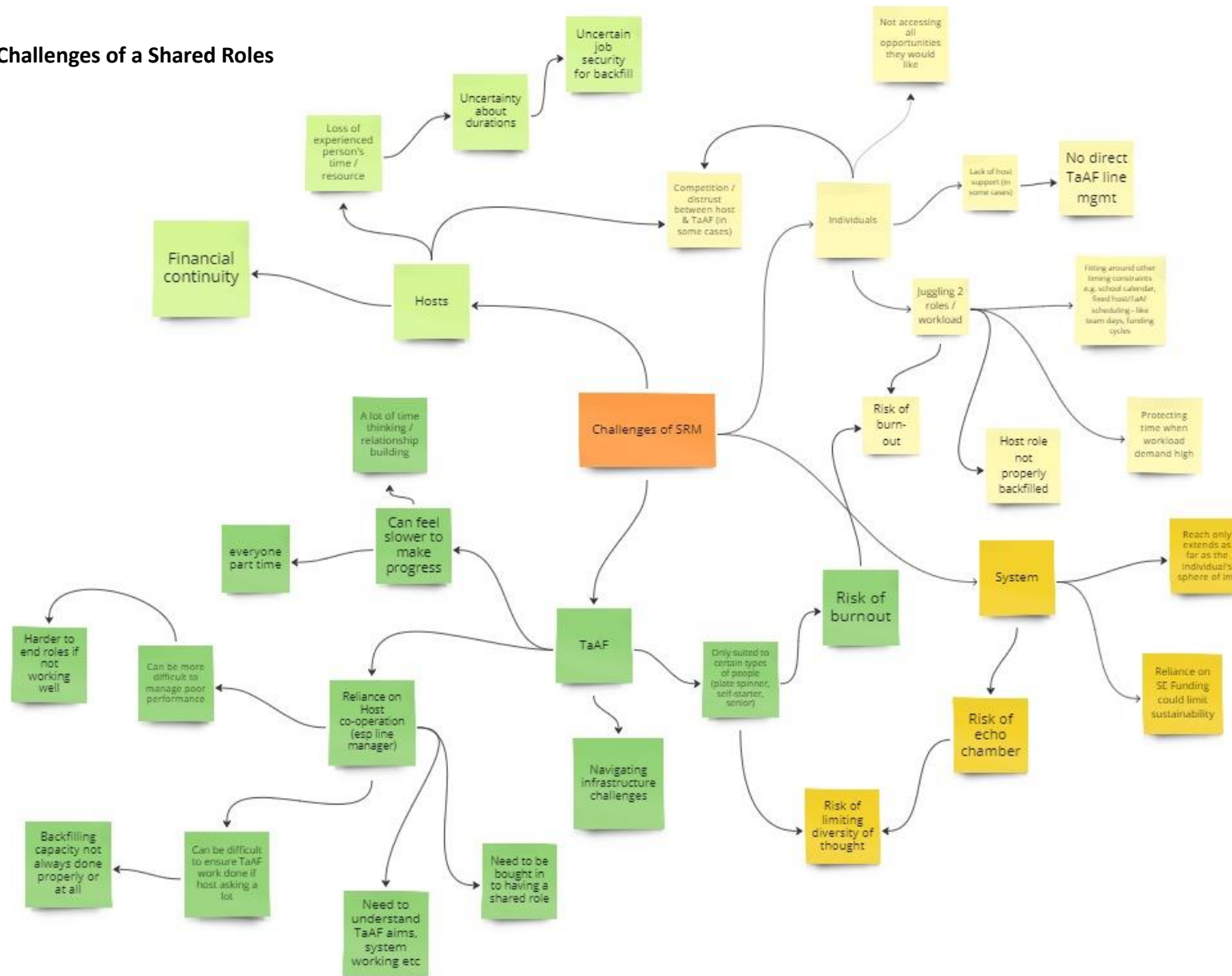


Figure 4: Challenges of a Shared Roles



5. Enablers of Shared Roles

Our original intention for this report had been to set out distinct enablers and disablers of shared roles, however, as our discussions progressed, it became quickly apparent that the majority of disablers arose in the absence of enablers. We have therefore presented this chapter as enablers, but also highlighted examples where this has worked less well in some situations in TaAF. As well as the descriptions below, these are represented visually in Figure 5.

Enablers are set-out under the following categories:

1. Right Role Set-Up
2. Right Host-Set-Up
3. Level of Seniority/Influence/Autonomy
4. Flexible Management Styles
5. Shared Objectives & Workstreams
6. Visibility/Tangibility of TaAF

7.1 Right Role Set-Up

Enabler	Detail
Clear what & why for each role	• Overarching purpose is clear - why do you need that shared role, why is that link important, what are you trying to achieve through it. • Clear skills, experiences, and connections needed (part of JD) • Clear objectives for the individual in each of their roles, including joint objectives and ripple effects desired • Clear expectations for all 3 sides – what are you all committing to do "the expectation document came out cause there was a little bit of uncertainty...I couldn't give you 100% confidence that it is followed to the letter but I think it certainly has helped give some guidance to the team" Works less well/risks • Early shared roles were described as "a bit fluffy" and as being "like guinea pigs" • Some roles had responsibility for connecting in with and representing specific partners, however, in the throws of TaAF work, they lost sight of that responsibility, which led to some challenges. "if [we] were really honest, we weren't as effective as a link back ...because when we were at TaAF, our focus was on...TaAF and managing the programme and we lost sight of the opportunity and our responsibility going back."
Right type of person	• Having a "TaAF person" who "gets TaAF" – the ethos, the mission and ways of working • Successful shared roles are perceived to have been targeted to a specific person whose capabilities were already known • The right person is worth the wait • One person commented that the need to go out to advert can hold things up Works less well/risks • When does having "TaAF people" become a threat to diversity of thought? "Yeah, it's definitely not for everybody." • Query as to true fairness of open recruitment processes

Right Skills & attributes	• People who do well in shared roles described as good plate spinners or jugglers "I'm fortunate...I actually thrive on multitasking and being able to juggle quite a number of separate but connected elements of work. I enjoy it, that's how I like to work." • Right subject matter expertise and local connections • Strong knowledge of local systems and processes • Project and people management skills • Comfortable with uncertainty and not always having a plan • Shared roles are not considered entry level roles Works less well/risks • Linked to managing workload, people who are good at and enjoy juggling can also be inclined to take on too much, sometimes at the expense of personal wellbeing. • Several people commented on reaching breaking point. "[They] likes to be on everything – [they] need to recognise when some things can't be done."
Right Support for person	• Whilst being a self-starter is seen as a benefit for shared roles, this does not mean support is not required. • If anything, more support is required to get the most from the role. • This should come from both TaAF and the host in collaboration • Being clear up front about what a shared role can entail (good and bad) is also beneficial so people know what they're getting into From TaAF • The core team are cited as being really proactive in supporting issues where these are raised or apparent • Team members feel empowered to push for change within hosts and partners as they have TaAF backing • Training and development opportunities are highly regarded • Interviewees also valued team days, the flexible office space and other efforts to create a sense of team (as described in 3.1.5) "You may still feel like the lone voice, but actually, there's a lone voice that has some backing...and if questions, you know or challenges, then there's a rationale, there's evidence." From Host • Support within hosts varies hugely from one organisation to the next • Linked to extent to which host has embraced TaAF and sees it as valuable or integral to their aims and work "Our CEO is very TaAF" • See also Mini-TaAF Teams below 3-way dialogue • A joint approach from TaAF and host is valued • Involvement from both in goal setting and performance management cycles would be beneficial. Works less well/risks • The above is working less well for some than others, particularly for those who are the only shared role in their organisation

	• Support received is appreciated, and there is an understanding of circumstances where support cannot be given, but feels like TaAF get 'off the hook' in some regards as they aren't responsible for line management etc. • Some mentioned feeling like conversations only happen between TaAF and host when something has gone wrong. "There isn't an adequate process of review and reflection between 3 parties about how it is working." • Risk that hosts are handing off responsibility for training & development to TaAF
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7.2 Right Host-Set-Up

Whilst the right person may well be important, having the right host and support from the right individuals within that host are just as important to the effectiveness of a shared role. Links with strategically important partners, who hold trust, power and influence within the system and communities, can be invaluable even where these relationships are less straight forward.

That said, the start point for each shared role can be very different, making it all the more important to be clear on why that relationship is important, where you are starting from, and what you hope to achieve, as detailed in 5.1.

Enabler	Detail
Understanding host context	• It is crucial to understand host context, their structures, ways of working and conventions, regardless of whether you agree with them, and to set-up shared roles sensitively to accommodate these. • Examples included hierarchical structures, high levels of bureaucracy, and a sense of paying lip service to community engagement and co-creation • Others felt limited by their size, resources, or geography • For TaAF shared roles, some hosts are fully engaged with system working, understand the "TaAF way" and aims, and have aligned goals and practices. "I always knew we had to be involved." • Others are at an earlier point on their journey, or perhaps have a small number of advocates, with many hearts and minds to win, including those in decision-making seats. Works less well/risks • Many organisations in Pennine Lancashire had seen TaAF as something of a cash cow for new delivery money and it has taken time to unravel this misunderstanding. • Many third sector organisations are cash poor at present, including local authorities, leisure trusts, and third sector organisations • TaAF has been perceived to be 'a bit wasteful' of resources, when others are feeling the pinch and struggling to keep the doors open for communities. • On occasion, TaAF team members have been noted as insensitive to the situation of others, for example, joking about the money they have to spend.
Understanding host concerns	• The most common challenges to hosts have been described above • As has the fact that some hosts have felt threatened by TaAF • Making space to understand these concerns, and any others, to reassure, and to find compromises and solutions, inevitably enables greater cooperation and can unblock things for those in shared roles.

	Works less well/risks Specific examples are not provided here to protect confidentiality
Host buy-in to shared role	- Linked to above and in addition to broader buy-in to TaAF WoW, it is hugely beneficial to have hosts who are supportive of the shared role and who recognise the benefits this may bring. - This would ideally be apparent in the direct line manager and also in the wider team around the person in the shared role. Works less well/risks - Suffice to say, where this is not the case, it is much more difficult for the person in the shared role to influence. - Specific examples are not provided here to protect confidentiality
Backfilling	- The purpose of a shared role is to create capacity for system change work and backfilling is recognised as an essential ingredient - This is an expectation but not currently explicit in contracts, leaving it open to interpretation. Works less well/risks - Some hosts have used this flexibility to identify workable alternatives; we would suggest that others have failed to meet their responsibilities in this regard - Specific examples are not provided here to protect confidentiality
Mini TaAF Teams	- Those who had colleagues in their own organisation who are also in TaAF shared roles described feeling most supported and empowered - Those organisations also demonstrate the most sizeable ripple effects (see Chapter 6) Works less well/risk - Those alone in shared roles are often being judged by the same standards as those working within a team. - This is an unrealistic expectation and risks individuals feeling like they've failed.

7.3 Level of Seniority/Influence/Autonomy

Enabler	Detail
Seniority/ Autonomy	- Many stakeholders discussed that shared roles had been most impactful for those at senior levels. "you can only be a leader at the level you operate at. You need credibility at a senior level early on as it is easier to get things moving and get buy in across an organisation" - With that seniority, typically comes a level of autonomy which can be invaluable to a shared role, where you are balancing multiple priorities. "in my role and the level that I'm working at, I've been working in [organisation] for many years, I have a degree of flexibility about how I work my days." - Junior roles cited greatest success when supported by mini-TaAF teams, particularly where their line manager was also in a shared role.
Position & skills to influence	To complement a strong network of local connections, the right position to influence is key for shared roles

	- You also need excellent strategic influencing skills with stakeholders at all levels Works less well/risks “it depends very much on that persons influencing skills - where they haven't been so good at that, influence is more limited.”
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7.4 Flexible Management Styles

Enabler	Detail
Relationships built on trust	- Roles work best when there is trust in the person to make good choices, get the work done, and to balance the best interests of both TaAF and the host. Works less well/risks - The risk here is acknowledged too, as it can be difficult in a shared role to know exactly how someone is spending their time and the potential to exploit this exists on all sides. - Majority referenced a sense of responsibility to both host and TaAF who are paying for their time, including TaAF core team and hosts.
Not counting hours or competing Give and take when required	- Linked to above, there was a preference not to have competition between Host & TaAF. No "what have you done on my time this week" - Those most comfortable in their shared roles described give and take from both sides during busier periods. “I would never say '[Name] you have to do X instead of TaAF work' both are equally important.” - Where this was most apparent, there tended to be greater overlap between TaAF and host activities and aims. - It was most common where there were mini TaAF teams. Works less well/risks - Both sides have been quite demanding at times in making sure they are ‘getting their hours. - Whilst interviewees felt comfortable with why this happened, it still creates additional tension and pressure. - Some prefer to adopt a more structured approach with fixed days on each role; whilst in one way these roles may be seen to have less impact, it is important to position measurement in the context in which a person is working, as has been discussed. - Nonetheless, there is a point where overly rigid structures become disabling.

7.5 Shared Objectives & Workstreams

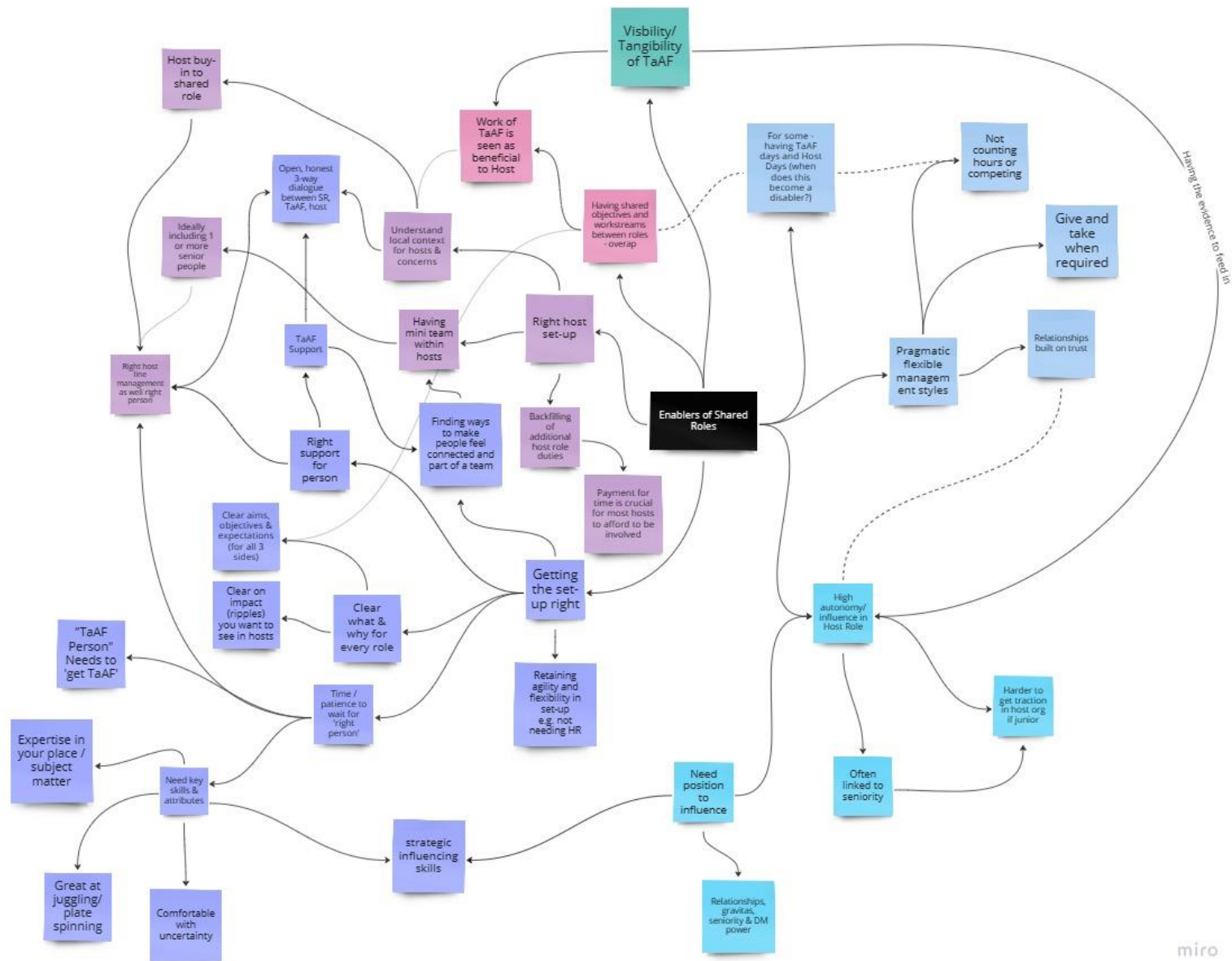
Enabler	Detail
Overlap between projects	- Most participants spoke about a degree of overlap between roles. Some went further, stating an “indeterminable difference between TaAF work and [host]” - Roles with more overlap were generally described as more impactful, particularly in terms of ripple effects in hosts - Individuals with greatest overlap also seemed most content in their roles

	Works less well/risks Some stakeholders highlighted roles feeling more separate; and where synergies did exist, the benefits weren't always recognised by hosts
TaAF work seen as valuable by host	- Linked to above, hosts who valued the work of TaAF and saw it as important to their work were more invested, and more supportive of the shared role aims - Some felt threatened by TaAF and some simply didn't 'get it'. Works less well/risks - In some hosts, this was considerably less apparent. This can be challenging for the person in the shared role. - In one way the host start point can be seen to limit overall impact, but on the other hand, progress can still be made and should be pursued if that relationship is strategically important. - Roles need to be judged on its own merit, however, and not compared with roles where host buy-in was high from the start.

7.6 Visibility/Tangibility of TaAF

Enabler	Detail
Visibility / Tangibility	- A less high profile enabler, however, mentioned by a number of people - In the early days, TaAF kept an intentionally low profile to allow them to test and learn. - Whilst the value was understood, stakeholders have found themselves challenged to explain, or at times justify, what TaAF does. - This links to the above point about organisations being cash poor and a perceived unfairness of the resources available to TaAF. - A number of people welcomed the move to the accelerator phase as an opportunity to talk more openly about TaAF's successes and to share knowledge that they hoped would help others. "It brings greater scope for shared roles to influence the system."

Figure 5: Enablers of Shared Roles



6. Ripple Effects in Hosts

Benefits for hosts were outlined in section 4.1.4. These are wide ranging and vary greatly for different organisations. We highlighted a number of direct benefits, such as being reimbursed for the time lost and development opportunities for the person in the role. We also highlighted various indirect benefits, which were common with increasing levels of commitment and support for the shared role and for TaAF aims and ways of working.

The latter are very much the ripple effects for hosts – the unexpected outcomes that can emerge as an indirect, and often less tangible, result of a particular course of action.

That intangibility can make ripple effects hard to evidence, and this is particularly true for TaAF. Where the greatest ripple effects have been highlighted, these are often about relationships, influencing, and changing the way people think.

Stakeholders highlighted that ripple effects:

- May not be recognised by hosts, as changes happen gradually over time, and may not be attributed to TaAF's influence
- Look different for different roles, organisations, and host start points
- Are dependent on landing things at the right time in the right way with the right audience

"I've always been very conscious of landing things at the right time and not forcing it...it's just putting it...onto the table with the right people at the right time...to see if the energy is there. Don't be too worried about it if it's not, it's clearly not the right time and there'll be another time."

Amongst those we interviewed, it almost felt like there were two camps in the terms of the extent to which ripple effects were felt. There were those who felt effects had been minimal, and those who saw the effects as making fundamental changes to them and their organisation's way of working (although it should be noted this was within the physical activity domain).

Ripple effects appear to depend on:

- Start point of host in terms of current WoW, understanding and buy-in
- Seniority/autonomy of person in shared role
- Wide support within host (i.e. most effective with mini-TaAF teams)
- Clarity on what the role is aiming to achieve

This means that the initial set-up of a role is essential, as discussed in chapter 5. It is also important to judge the impact of each shared role on its own merits. Directly comparing shared roles risks undermining what realistically can or has been achieved. It also risks leaving those in roles with less enablers from the outset feeling less successful and less valued.

On the flip side, however, when the conditions are right, it is clear that shared roles can be strategically powerful and, over time, lead to major changes in how systems operate within hosts.

7. Conclusion & Recommendations

This research has identified a broad spectrum of benefits of shared roles for individuals, TaAF, hosts and the system. It has also uncovered a fascinating narrative around what enables them to be most effective. It is clear that TaAF are already gaining great value from this unique way of working and that the benefits could be leveraged in other places seeking system change.

Shared roles appear to work best when you are seeking wider influence, through collaboration, co-production, and connection with key partners across a system. They can be married effectively with full-time support roles, such as evaluation, communications, and finance, which tend to need focused resource and have less requirement to directly influence partners.

9.1 Keep doing

Going forward, there are a number of things which TaAF are already doing particularly well, and these should be continued and capitalised on where possible.

- Supporting people to protect time and space for collaboration and system thinking
- Providing high quality learning and development opportunities
- Actions to create a sense of belonging within the team
- Support from central team with tricky relationships, idea generation, and removing blockers
- Creating opportunities for peer to peer support, including mini-TaAF teams within hosts
- Challenging people (in the right way) – this is almost always valuable (but remain vigilant on not calling people out, putting them on the spot, or stifling different thinkers)
- Allowing flexibility about how people manage time, recognising that this works differently for different people with different circumstances / constraints

9.2 Areas to develop

One of the things which was widely acknowledged by stakeholders was that, whilst the flexible approach taken at the outset of TaAF was the right thing at that time, a certain amount of structure is helpful and, in some cases, needed. TaAF have already begun to evolve working practices in this regard, and we recommend the following to build on that work.

9.2.1 Planning roles

Ahead of establishing a new shared role, consider defining the aims of each role more formally, particularly in the context of the host organisation. Where possible, reflect this in the job description/recruitment process.

- What are you trying to achieve through this shared role?
- What level of influence will be needed to have that impact?
- What other skills and subject matter expertise will be essential and helpful for the role?
- What wider support might the person need from their host?
- What sort of organisation might that person sit in?
- What might be the context/concerns of those organisations?
- Why is this role/relationship important?
- What might you like that person to achieve in terms of ripple effects?

9.2.2 Set-up of roles

Once a person has been appointed, consider the whole set-up for a person, including support from host and TaAF sides.

- Make requirement for backfill explicit in contractual agreement and expectations documents and establish processes to ensure this is done.
- What is the support structure on both sides? Are they the only shared role in their organisation?
- How supportive is their line manager (in theory and in practice)?
- Where are the opportunities for overlap between host work and TaAF work?
- How do the above structures align with what we hope for them to achieve?
- Agree the purpose of the role between the person, TaAF and the host.
- Establish short-term and long-term goals relevant to the context in which they are operating.

9.2.3 Management of roles

Once a person is in post, establish clear mechanisms for day-to-day support for those in shared roles from both sides, with co-operation between all parties.

- Degree of formality TBD by team but more than exists now
- Agree processes for regular, 3-way check-in and review of how things are going at a personal as well as a project level.
- Ensure everyone has a “person” within TaAF who can offer day-to-day support.
- Agree where responsibility sits for supporting the person with development needs (including training, mentoring, on the job training, reflection time) both operationally and financially.
- Clear, 3-way approach to performance management, reward & recognition:
 - Takes account of the context in which the person is operating
 - Avoids direct comparison with shared roles with very different enablers
 - Ways to recognise and celebrate when people are doing great work in both roles
 - Clear eligibility for reward & recognition programmes
 - Processes to tackle difficult conversations if things aren't on track
 - Mechanism to end shared roles if they are not working following appropriate attempts to resolve issues
- Provide safe spaces for open discussions on individual and team wellbeing.

9.3 Future considerations & risks for shared roles

9.3.1 Recruitment risks

We have discussed throughout this report a number of specific areas related to recruitment which may present a risk to TaAF. The evidence we have collected should be treated with caution, as it is anecdotal, however, these themes have emerged frequently enough to be worthy of consideration.

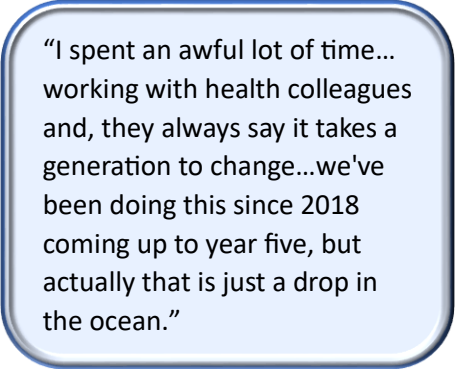
- **Fair and open recruitment practice:** How is the pursuit of the ‘right person’ and particularly actions to line up a person for a role impacting the accessibility of opportunities for all?
- **Limiting diversity of thought:** What is the impact of recruiting ‘TaAF People’ on diversity of thought and voices? Are some people being excluded from getting involved in TaAF?
- **Burn out:** Does the success of “plate spinners” lead to recruiting individuals who are more likely to compromise personal wellbeing in pursuit of achieving aims? How is this exacerbated by the continuous nature of system change?

We recommend TaAF conduct open and honest discussions as a team to consider and manage these risks, and that the dialogue be kept open and reviewed regularly.

9.3.2 Financial sustainability

The long-term sustainability of the TaAF model has come up frequently in conversations, with varied viewpoints on the extent to which system change would be sustained without TaAF. Some noted that, whilst TaAF has been in operation for five years, this is only a small amount of time relative to what is required to embed lasting change.

We are aware that this is a topic that is already front of mind for the TaAF core team, as well as wider colleagues, and we support continued investment of time and energy to identify ways forward to secure this future sustainability. For example, several people mentioned alternative sources of funding that could be legitimately diverted into what is currently TaAF work (e.g. Local Authorities, Health) as the evidence base grows for the long-term cost savings from increased physical activity.



"I spent an awful lot of time... working with health colleagues and, they always say it takes a generation to change...we've been doing this since 2018 coming up to year five, but actually that is just a drop in the ocean."

9.3.3 Future Research

In addition to the areas above, a number of people mentioned other shared roles which have been established outside of TaAF. It could be valuable to engage further with those in and supporting those roles to understand how shared roles are working and being implemented in other contexts. This would add great value to the above discussion around sustainable ways TaAF work might be continued in the long-term.

Appendix 1 – Shared Role Expectations

Secondment Model Responsibilities – What is expected of everyone within the TaAF Secondment Model

TaAF

TaAF responsibilities

- Clarity regarding the 'TaAF Approach'
- Provide a range of structured personal development opportunities for secondees in areas that support the objectives of TaAF (to include skills development and exposure to different groups and discussions through the Local Delivery Pilot work)
- Enable and encourage secondees to protect time for thinking, preparation, creativity and sharing
- Ensure secondees balance of TaAF workload is proportionate to the amount of time they are paid for by TaAF, recognising the need for flexibility and understanding its not always distinguishable
- Provide structure and direction that enables the effective sharing of learning
- Have a named key contact within the Coordination Team for each TaAF Network Team to provide a sounding board, advice and help
- Open and regular communication between a named TaAF contact and both the secondee and host organisation, to talk about progress, performance, identifying anything that needs attention and offering help where needed
- Clarity on what is expected of the secondee and the host organisation to ensure the secondment model is as effective as it can be
- Utilise TaAF connections, networks and 'ins' to benefit the TaAF Network Teams and host organisation
- Identify and share opportunities where the TaAF Network Team and/or host organisation can add value to and/or could learn/benefit from
- Agree with the host organisation the responsibilities and processes for dealing with any HR matters related to the TaAF element of the role
- Maximise the secondment model opportunity to strengthen the secondee and the host organisation

Seconded Person

Seconded person responsibilities

- Commitment to the 'TaAF Approach' and to representing this in how things are done
- Raise awareness of TaAF whenever relevant and possible
- Ensure the TaAF Network Team plans support the delivery of the TaAF intended outcomes
- Commitment to the personal development opportunities identified through TaAF
- Protect TaAF and Host Organisation funded time to ensure fairness to both, being flexible as needed and highlighting times where it is difficult to manage competing priorities
- Share informal learning regularly across TaAF networks and proactively capture and share more formal learning in line with the direction provided by TaAF
- Ensure there is open and regular communication with named TaAF contact and the host organisation to talk about progress, performance and offering / asking for help where needed
- Attendance and active participation in team time, meetings, workshops and other TaAF related sessions, sharing thoughts, ideas and learning
- Apply the things that are learnt, experienced, developed through TaAF in their existing roles, sharing with colleagues and partners
- Bring the knowledge, connections and experience from their existing roles into TaAF and vice versa
- Involve the TaAF Coordination Team in discussions related to changes to TaAF roles / teams
- Communicate effectively with Host Organisation regarding sickness and/or long-term absence and where necessary, discuss solutions to minimise disruption
- Flag anything that is unclear and/or needs attention
- Maximise the secondment model opportunity to strengthen TaAF and the host organisation

Host Organisation

Host organisation responsibilities

- Take time to understand the 'TaAF Approach' and encourage and enable the secondee person to demonstrate it in their work
- Raise awareness of TaAF whenever relevant and possible
- Enable and direct the secondee person to commit to the personal development opportunities identified through TaAF
- Enable and direct secondee to protect TaAF time for TaAF work and their workload across both roles is proportionate
- Ensure secondees balance of Host Organisation workload is proportionate to the amount of time they are paid for by the Host Organisation, recognising the need for flexibility and understanding its not always distinguishable
- Enable and direct the employee to bring in the things being experienced / learnt through TaAF into their existing role and where this could be improved, offer support as needed
- Ensure there is open and regular communication between a named Host Organisation contact and both the secondee and the appropriate TaAF Team, to talk about progress, performance, identifying anything that needs attention and offering help where needed
- Utilise Host Organisation connections, networks and 'ins' to benefit TaAF
- Identify and share opportunities in the Host Organisation / place where TaAF could add value or could learn/benefit from
- Involve the TaAF Coordination Team in discussions related to changes to TaAF roles / teams
- Flag anything that is unclear and/or needs attention
- Maximise the secondment model opportunity to strengthen TaAF and the secondee

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