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Playbook 2021/22

Procuring, setting up and running the Peer Networks Programme

Version 3: April 2021

Department for
Business, Energy
& Industrial Strategy

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Introducing the Playbook

Department for Business, Energy & Industrial Strategy

Introducing the Playbook

Purpose

This Playbook is intended as a user handbook to support the successful roll-out and implementation of the Department for Business, Energy and Industrial Strategy (BEIS) funded Peer Networks programme. It aims to provide a common resource to support local delivery partners to procure, market, deliver, manage, report and quality assure the programme.

The Playbook will help by providing a common benchmark, which will ensure there is a suitable level of national consistency in how the programme is delivered, whilst allowing for a degree of local flexibility as appropriate. The Playbook is designed as a functional document. The information contained within this Playbook can be copied and transferred to locally created assets.

Audience

The Playbook has been designed for the Playbook following audiences:

1. Programme managers overseeing the roll-out of the programme at a local level
2. Procurement teams responsible for procuring and contracting with delivery partners
3. Operational teams responsible for day-to-day management, quality assurance, reporting, evaluation
4. Delivery partners and facilitators who will be actively engaged in delivering the programme

Supporting materials

The Playbook is supported by a series of common marketing assets and other documents that can be used at a local level to communicate and disseminate the Peer Networks programme or are designed for use by the facilitator and for participants. See Annex 2 for details.

Key programme terminology

The Playbook references the key programme components as follows:

Component	Playbook Terminology
The national activity	The programme
LEP/Growth Hub level activity	Local delivery
A group of SME leaders in an action learning series	A cohort or set
A virtual meeting of the cohort	A session
A full group of sessions	An action learning series
The organisation or supplier delivering the programme	The provider
Additional support provided through the programme	One-to-one support
Person attending	The participant
Small and Medium-sized Enterprises (SMEs)	To qualify as an SME, the company should satisfy two or more of the following requirements: not more than 250 employees, not more than £36 million turnover or not more that £18 million balance sheet total. (As defined by sections 382 and 465 of the Companies Act 2006)

Peer Networks

Peer Networks Programme

Department for Business, Energy & Industrial Strategy

Peer Networks Programme

Introduction

Peer Networks is a national initiative that will be delivered locally in England through the Local Enterprise Partnership (LEP) network and their respective Growth Hubs. The programme's longer-term aims are focused on reducing the UK productivity gap by helping business leaders find practical solutions to strategic and operational challenges. It also forms part of the Government's response to the COVID-19 pandemic, working with the EU, seeking to improve the resilience of SMEs, their capability to adapt their business models to the "new normal" and position themselves for future success, driving longer-term productivity gains. Peer Networks is only operational in England[1].

The programme will see the creation of a series of Peer Networks (cohorts) through the Growth Hub network, with each group consisting of 11 owners or managers from the SME business community participating in each network. Led by an experienced facilitator, these Peer Networks will typically meet fortnightly as part of delivering 18 hours of action learning through 2-3-hour sessions. Individual one-to-one support (coaching, mentoring, or advice) will also be provided either directly by the programme, or from other existing schemes to help to implement and manage change. Active involvement in the Peer Network will enhance the leadership capabilities, knowledge and confidence of business owners and entrepreneurs within a local region. It will help build local connectivity and strength within the SME business community.

The Peer Networks Programme is funded by the Department for Business, Energy & Industrial Strategy (BEIS) in response to a commitment made in the 2019 Business Productivity Review.[2]

Context and Need

The UK has a longstanding productivity challenge; even before the financial crisis labour productivity was on average 13% higher in the rest of the G7 countries compared to the UK.[3] This 'Productivity Gap' has since been exacerbated by the UK's unusually weak productivity growth since the financial crisis in 2007-2008. The UK's overall future productivity growth will, in large part, be determined by the performance of individual businesses. Whilst the UK has some of the most productive businesses in the world, we also have many low productivity businesses. The current effects of the COVID-19 pandemic combined with the transition into a new trading environment with the EU has the potential to further disrupt UK productivity but also presents an opportunity as businesses adapt their business models, create new ways of working and access new markets.

The 2019 Business Productivity Review found that those businesses that adopt formal management practices are more likely to achieve higher turnover, employment levels and productivity growth. There is a broad base of evidence that suggests that businesses that seek external advice or undertake formal training are more likely to improve their overall business performance.

Whilst there is a large private sector market for advice and training, SMEs report issues with a lack of awareness of the help available and a lack of trust in the quality of provision. Affordability is also a challenge. The Business Productivity Review reported that businesses are most likely to look to trusted peers and professional networks for advice first, often leveraging their networks and existing relationships with intermediaries to signpost and help them to navigate the business support market. The Business Productivity

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[1] N.B. The Scottish Government is funding Productivity Club Scotland - see https://www.productivity.scot/

[2] Business Productivity Review. November 2019. www.gov.uk/government/consultations/business-productivity-review-call-for-evidence

[3] ONS International Comparisons of Productivity, Final Estimates 2016; pre-crisis taken to be '2007' Note: recent OECD analysis suggests the productivity gap with the UK and other G7 members may be moderately overstated, but still large relative to France, Germany and the USA.

Review found that numerous respondents highlighted the complexity, fragmentation and size of the UK business support market and pointed out this complexity is found in both the public and private sector business support provision.

Evidence supplied to the review by the OECD[4] supports this previous finding that businesses often prefer to take advice from trusted sources, and they look to their existing networks – such as their peers or their accountants – when taking advice. Businesses also usually take advice at trigger points, such as when faced with challenges requiring change, including both competitive pressures and opportunities.

In addition, there is robust evidence that demonstrates the importance of business managers learning from peers, particularly in their local area. Peer networks are integral for trusted advice. They help businesses navigate multiple stages in the business change cycle, can be called on by businesses time and again, and through structured conversations they can be focused to support the specific issues faced by businesses. The Business Productivity Review references the PLATO Networking programme operational in Belgium. The aim of the PLATO Networking scheme is to provide intensive guidance to SME managers by organising structured meetings between SME managers. One study[5] found that participation in the scheme was associated with 2.5% higher labour productivity, another study[6] found that businesses participating in the network had 5% more assets and 7.4% higher value-added growth.

Building on these findings the Department for Business, Energy & Industrial Strategy, has committed £9m to strengthen local peer-to-peer networks. Peer networks are focused on business improvement so that thousands of business leaders can share and benefit from expertise on leadership, business development and technology adoption. Whilst the long-term objective of this initiative is to drive up productivity and help close the gap with the UK's international competitors, this is exactly the support businesses need now to develop the skills to tackle issues they face in relation to COVID-19 and having entered a new trading environment following the UK's departure from the European Union.

Funding will be channelled through the LEPs which make up the network and delivered locally through the Growth Hubs.

Peer Networks and Action Learning

Action learning is an approach to problem solving and learning in groups to bring about change in individuals, teams, organisations and systems. It is based on the principle that the most effective learning takes place in the context in which people are working. A Peer Network is a private group of invited business leaders, formed to support its participants by working together to share challenges, solutions, knowledge, expertise and experience. Typically:

- Participants gather on a regular basis with the support of a facilitator to explore individual participants' challenges and to co-operate by sharing learning from each other's successes, setbacks and practices.
- The point is to realise opportunities, overcome challenges, and develop themselves and their businesses.

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[4] International Experience in Leveraging Business Development Services for SME Productivity Growth: Implications for UK Policy – Summary of an Expert Workshop and Background Papers. OECD. September 2018 www.oecd.org/cfe/leed/UK-BDS-Synthesis-Report-Final.pdf

[5] Van Cauwenberge et al (2013), An evaluation of public spending: the effectiveness of a government-supported networking program in Flanders.

[6] Schoonjans et al (2013), Knowledge networking and growth in service firms

- The conversation is structured and facilitated using action learning principles to ensure consistency, efficiency and effectiveness, leading to specific actions self-directed by participants.
- Participants reflect on the feedback and discussion and act on new thinking following the session, reporting the results back to their co-members the next time they meet. This helps everyone move forward on their challenges and learn from each other's progress. The fact that participants always report back to the group helps everyone hold each other to account for progressing with their issues and opportunities.
- The process is designed to deliver new insights for participants and result in tangible actions or solutions.

For the Peer Networks programme, participants will benefit from both access to a professional action learning facilitator and one-to-one support outside of the group sessions. Importantly, the content of the sessions is driven by the participants from a list of key themes (e.g. business development, marketing, people management, technology adoption, response to COVID-19, EU transition) and can be tailored to focus on their specific needs, including wider issues that may be affecting their sector, locality or business model.

The Format

Each Peer Network will be underpinned by an Action Learning methodology which is designed to enable participants to unlock benefit from – and the collective thinking power and experience of – a peer group. This is not formal management or skills training, but personal development focused with the help of a facilitator. The Action Learning process is a cyclical one, typically running over several weeks. Each member has the chance to present an opportunity or issue and receive help to explore this and any solutions, whilst also commenting on the challenges for others. The process broadly follows this pattern:

1. Present your opportunity, challenge, or problem
2. A facilitator helps the group members question each participant constructively to challenge views and understanding, perceptions and assumptions. Others share their knowledge of the issue.
3. The participant gains new insights, understanding, ideas and can identify actions to take.
4. They can test out their action plan with the group.
5. Participants bring results back to the group to feedback on what worked, what failed, and why?
6. Participants can then reflect, draw conclusions, and learn from this rich experience and integrate the new knowledge they have gained into workplace actions and business plans.

Benefits

Facilitated peer networks based on action learning principles have many benefits for participants:

- **Learning from others**: participants benefit from the collective experience of others in their Peer Network. They gain practical insight into how others have approached challenges and opportunities, understanding what worked well and what was not as effective.

- **Perspective shift:** the structure and format of the facilitated group sessions ensures that participants will consider their challenges and opportunities through a wider variety of lenses, as they explain their situation and are questioned by the group.

- **Accountability:** participants feel far more accountability to a group of their peers than to one consultant, coach, or advisor alone. Being accountable for detailed outcomes in the context of the actions they bring back to the peer group in the next session is a particularly strong motivator. In this programme the process is also assisted by one-to-one support to aid reflection and the implementation of actions.

- **Building relationships:** the confidential sharing and exploration of real business challenges is far stronger than that created in standard networking scenarios. These connections endure and promote informal mentoring and support between businesses outside of group sessions.

- **More action:** interactions lead to follow-on conversations outside the disciplined environment of the facilitated group sessions. Suggestions and offers of help from peers inevitably drive further connection and often action based on inspiration from a peer.

- **Perpetuation:** the strong relationships formed between peers, through the facilitated sharing and consideration of each other's business challenges, often continue to be valuable long after the formal interventions have completed.

- **Reflective practice**: each session also ensures participants share their experiences (the good, the bad and the ugly) in the context of business theory, exploring ideas and solutions with others, and reflecting on what they might do differently next time and what the outcomes might be. The act of taking part in these structured conversations builds the understanding and capability of participants to reflect upon their own performance, including successes and setbacks.

Once participants are familiar with the process and format, they can continue post-programme, with sessions becoming self-facilitated by the group members. Groups often form LinkedIn, or WhatsApp groups and maintain interactions in some cases for many years.

Aims and objectives

Peer Networks will form an important part of the Government's drive to improve productivity and deliver part of the economic response to the effect of COVID-19 on businesses. It will provide support to SMEs as they move into and through the Recovery phase of COVID-19 response. The aim is to improve SMEs' capability to adapt their business models to the "new normal", position themselves for future success and drive longer term productivity gains through improved leadership and management skills and tech adoption.

The programme will aim to target 6,000 participants nationally in 2021-22. These will be spread across 38 LEPs in line with local demand and capacity to deliver.

Typical success will be measured by:

- Firm survival
- Growth in value added as an indicator of recovery from COVID-19
- Improvements in labour productivity
- Participant views on the resilience of their SME
- Participant views on their leadership and management skills
- The SME's ability to recruit and retain staff where appropriate
- The SME's ability to access cash
- Changes in the SME's adoption of technology

Peer Networks

Setting up the Programme

Department for Business, Energy & Industrial Strategy

Setting up the Programme

Delivery Model

Peer Networks is a national initiative that will be delivered locally through the Local Enterprise Partnership (LEP) network and local Growth Hubs.

The programme provides the opportunity for leaders and senior managers from eligible SME businesses to participate in a local peer network that will meet regularly, usually over several months. The specifications for cohorts are:

Cohort size:	11 business owners or senior decision makers per cohort.
Number of sessions:	Led by an experienced facilitator using the action learning methodology, the number of sessions will be determined by local needs but recommended between 2-3 hours in duration. Each cohort must meet for a total of 18 hours.
Frequency and timing of sessions:	Recommended fortnightly (subject to local discretion). All sessions must be completed by 31 March 2022.
Location:	Given current social distancing restrictions and the ongoing COVID-19 pandemic the sessions will be delivered virtually. As restrictions and guidance are changed LEPs can consider face-to-face delivery where there is a demand for this style. This will be a matter for local discretion.
Topic selection:	Topics could include but are not limited to: ▪ Finance ▪ HR ▪ Sales and Marketing ▪ Adjusting to social distancing ▪ Business Model Innovation ▪ Change Management ▪ Embedding formal management processes and systems ▪ Digital (including adoption and implementation of technology, cyber security) ▪ Use of data to drive value in the business ▪ Working with the EU ▪ Net zero
Methodology:	Each session must be facilitated according to action learning principals.
1-2-1 support:	Individual one-to-one support relevant to identified businesses needs must also be provided. This must be a minimum of 3.5 hours. This requirement can be met from within the programme, or through other existing local activities. This support must also be completed by 31 March 2022.

Each of the sessions will need to be led by an experienced facilitator utilising the action learning methodology and techniques. This is a highly effective way of running peer networks and provides a common framework to ensure national consistency across all the local groups.

Working with Existing Local Programmes

The Peer Networks programme allows flexibility of delivery at a local level. It should complement existing local programmes and provide the opportunity to reach a wider audience and build capacity in the marketplace and address gaps in service provision. Integration locally will help Growth Hubs deliver within the timescales, ensuring that best value for money is achieved, and preventing the duplication of existing local provision.

To maximise the reach and value of the programme, Growth Hubs are encouraged to work with local suppliers and partner organisations as needed, adopting best practice to get the best results. Three guiding principles are listed below:

i) **Build on existing networks:** a good programme will build on the work of existing local networks where they exist. These are primed for scaling up the volume of business participation and have structures and processes in place to ensure the best chance of success.

ii) Making it business-led: the most successful peer networks are those where participants feel they are amongst friends, that discussions are confidential and not at commercial risk and that they are being run by businesses for businesses. Participants should feel ownership of their cohort and should be able to set the agenda and pace as far as practicable.

iii) Aim for sustainability: a good programme will give participants the know-how to do it themselves, encourage them to continue to meet, and suggest ways to make this happen. This creates legacy and builds capacity within a local area. *(See section on Post-programme sustainability below)*

Flexibility around funding and local deployment helps ensure national consistency whilst providing local flex.

Action learning provision

Where local publicly funded programmes, or privately driven action learning services and activity exist, the BEIS funding can be used to support **new or additional activity** under the Peer Networks brand to increase engagement and new business participation. Where this approach is used it is essential that the support provided matches the delivery format for the Peer Networks programme – 18 hours of facilitated action learning.

One-to-one support provision

The one-to-one support available through the Peer Networks programme can be delivered either by the programme itself or through **existing local programmes**, where appropriate and where available. A minimum of 3.5 hours of support must be provided and recorded.

There is no requirement for the one-to-one support to be funded by the Peer Networks programme if alternative existing funded provision is available. Participants can be referred onto this existing provision.

Where one-to-one support is provided through existing funded provision it will be the responsibility of the individual Growth Hub to capture KPI information and record activity on their CRM that relates to participants from the Peer Networks programme receiving this support. They must evidence which programme the one-to-one support has been referred to, how many hours of support has been delivered to that company under the programme and the nature of this support.

Through monthly KPI reporting, Growth Hubs will be asked to record if participants/businesses received support through the Peer Networks programme or outside of the programme (through existing funded provision) and whether minimum requirements have been met (e.g. 3.5 hours for one-to-one support).

While participants cannot be required to accept this support, it should be made clear at the onboarding stage that this is an important part of the programme and has been included based on evidence that coupling this with the ALS approach can further enhance the benefits. Therefore, effort should be made to encourage all participants to take it up. Some areas have found that (despite encouragement) not all participants want the full 3.5 hours and that others have asked for more so have used local discretion to offer support where it is most wanted.

Peer Networks

Selling the Programme

Department for Business, Energy & Industrial Strategy

Selling the programme

Positioning

The Peer Networks programme should be positioned as a national SME business support programme that is being delivered locally through the LEP and Growth Hub network in partnership with BEIS. The programme's longer-term aims are focused on reducing the UK productivity gap. It also forms part of the UK Government response to the COVID-19 pandemic and the new trading relationship with the EU. The benefits of participation outlined in this document should be used to underline the reasons for getting involved as well as the access to wider support.

Branding

The Peer Networks programme has a distinct brand identity which has been applied to the Marketing Toolkit of assets. Brand Guidelines have been provided as part of this toolkit to guide the use of the logo (incorporating the relevant Growth Hub logo) in relevant existing materials in order to tailor to the local Hub and for the design of any further local assets, and should be referred to when developing any marketing materials, or content.

The Brand Guidelines cover all key elements of the brand and provide the key information such as fonts, colours, logo use, together with assets and a range of materials and templates (which will accompany the Brand Guidelines). To ensure consistency of brand and identity for Peer Networks, whilst featuring a direct connection to the local Growth Hub, please ensure these guidelines are shared with internal marketing teams and PR and design agency suppliers.

The logo was constructed in such a way to be used as an overarching national programme logo featuring 'Peer Networks' where there is no direct link to a specific local Growth Hub. The logo also incorporates a 'lock-in' area for each local Growth Hub's logo in the same location, for consistency. The logo features a fluid graphic incorporating two elements, reflecting the fluid connectivity of the Peer Networks programme, representing the cohorts, facilitator, and the individual, all working and networking collaboratively and seamlessly. You will see from the set of assets, materials and templates provided to the Growth Hub network and the accompanying Brand Guidelines document, that this fluid element has been carried through and used across all elements to provide brand synergy and consistency.

Tone of voice

There is no set or fixed Tone of Voice (TOV) for Peer Networks. This is based on enabling the individual Growth Hubs to use and apply their TOV to relevant additional communications. However, as you will see from the existing materials and copy, the TOV is clear, concise, positive, inclusive, personable and 'Active' in its style, and benefit focussed for the individuals. To ensure consistency please refer to the Brand Guidelines and supporting materials available in the shared area for a guide on TOV.

Core messaging

Whilst there is no specific 'Core Messaging' section in the Brand Guidelines, as with TOV, this enables each Growth Hub to tailor their own comms, you will see clear core and broader messaging in the Brand Guidelines and across all materials, specifically the two and eight page leaflet. These resources in particular clearly features the core and supporting messaging including target audience, benefits and delivery mechanism, and provides a basis for additional messaging development.

Target audience – who to engage

Eligibility

The Peer Networks programme is targeted at companies which meet the criteria of the Companies Act 2006 definition of small or medium sized enterprises.[7] It is intended to support SMEs to recover from the impacts of Covid-19 and in the longer term to improve their productivity.

This project is one of several HM Government measures to support business.

The CBI estimated that boosting the productivity of the UK's SMEs to match that of Germany could add up to £100 billion to the UK economy and improve the competitiveness of UK business

A careful balance needs to be struck between inclusivity and preserving the policy intent. The criteria have been set to enable those firms most likely to make productivity improvements to participate in the project.

- Those SME leaders which have businesses that have been in operation for long enough for challenges to materialise.
- Those SME leaders which are managing the challenges associated with running a sizeable team of permanent staff.
- Those SME leaders whose business is well enough established to be generating a turnover; and
- Those SME leaders who are motivated to learn from others to improve their business.

Participants must be drawn from businesses that employ staff through PAYE fitting the profile shown below:

Essential criteria:

- In operation for 1 year+
- At least 5 employees*^
- An aspiration to improve
- A turnover of at least £100,000*

^A part time permanent employee should be counted as an employee.

It is essential that these criteria are followed to ensure that this intervention reaches the target audience.

Desirable:

- Businesses that have the potential to scale up
- Businesses who already export, or who have the potential to become an exporter

[7] Companies Act 2006 definitions: https://www.legislation.gov.uk/ukpga/2006/46/section/382 and https://www.legislation.gov.uk/ukpga/2006/46/part/15/chapter/12/crossheading/companies-qualifying-as-mediumsized

There are two eligibility flexibilities:

Businesses impacted by Covid-19
In the case of SMEs that prior to the impact of Covid-19 would have qualified, but which now do not due to the impact of Covid-19 (i.e. drop in turnover, or reduction in the number of employees) discretion is provided for local Growth Hubs to take participants whose business would have met the criteria in the 12 months prior to March 2020, providing those businesses are likely to be viable going forwards as assessed by the Growth Hub. The flexibility only relates to the turnover and number of employees criteria.

Sectors
Flexibility is provided for the number of employees in creative industry businesses, which can include associates/freelancers. This exemption only applies to the creative industries and does not include sub-contractors or cover any other sectors. This flexibility exists only for the creative industries because it is a sector that frequently operates with associates/freelancers in senior leadership positions.

We are defining creative industries according to SIC codes (see Annex 1).

We are defining an associate (the term Freelancers is common in the creative industries sector) as someone who “Pays their own self-employment taxes and doesn't have any employees”. They are typically not an LTD organisation, and we are also excluding partnership organisations.

The nature of the programme funding allows participants to be drawn from a wider range of organisations than are permitted by many business support programmes including, for example, the visitor economy, social enterprises, construction, hospitality and health and care – allowing engagement with a more diverse range of entrepreneurs, business owners and business leaders. However, the focus should be on those businesses that have potential to contribute to the UK economy so while charities are eligible, local discretion should be used to decide if this is worthwhile.

The business should have a trading address within the relevant LEP area. In certain circumstances, and with formal agreement from both relevant LEPs, an exception may be made.

Participants can be drawn from any industry sector.

Suitability – the ideal client (participant)

Participants must be senior decision makers within the business.

The Peer Networks programme has a broader reach than many typical support programmes and as such, **it aims to attract participants who are new in terms of accessing business support**. Therefore, the programme is not open to those who participated in 2020-21. However, if, due to circumstances out of an individual’s control, they had to drop-out of a cohort, local discretion can be used around allowing them to participate in year 2.

The programme presents an opportunity to engage with businesses in new sectors and individuals that have been unable to access other programmes, or where existing programmes have not been right for them or their circumstances.

Participants whose businesses are dealing with some or all of the following challenges will be particularly well suited to the programme and will benefit the most:

- Their business is facing significant challenges or opportunities such as:
  - Increased uncertainty and change because of COVID-19, the UK leaving the European Union and Net Zero
  - Significant business growth with the need to quickly evaluate new opportunities
  - A need to pivot its business model or working practices to remain competitive
  - Is looking to find new ways to innovate products and services

- Their business wants a more diverse sounding board and will benefit from broader perspectives:
  - Their external sources of business advice are limited
  - Their business does not currently have a management board
  - Their business has a limited management board but does not have any non-executive directors

- The participant:
  - Has the autonomy to decide to join the programme and the licence to act
  - Is interested in developing their leadership and management skills
  - Is ambitious for their business
  - Already attends less formal networking groups
  - Values the opinions of others
  - Wants to contribute to the success of others

The action learning methodology requires that each participant must own a task, problem, or opportunity that they can present to the set and action within their business. It is also essential that each person takes part voluntarily, makes a commitment to attend all sessions, and to act and learn from the effects of that action. This means they cannot delegate responsibility to a colleague to attend on their behalf.

Only one person from a business or organisation can participate in the programme this year – in order to ensure that the maximum number of SMEs can benefit from the programme.

Finding clients

Participants for the Peer Networks programme could be drawn from the following sources:

- Direct marketing activities to engage **new** clients including those who are hard to reach
- Existing local business support programmes
- Recommendations from:
  - Membership organisations
  - Local business coaches, mentors and advisors
  - Business and professional services sector partners e.g. accountants
  - Industry or sector specific associations
  - Local cluster bodies
  - Local Authorities who have been handling Small Business Grants
- Local networking groups and breakfast clubs

It is worth noting that accountants have been a significant touch point for companies impacted by COVID-19 due to the way the financial support packages have been structured and intrinsically linked with HMRC and company finances. As such, local accountants could provide an efficient channel to reach COVID-19 impacted businesses.

Recruitment

All marketing and recruitment will be carried out locally and is the responsibility of the LEP/Growth Hub and – where applicable – their delivery partners. There will not be any central national marketing campaign driven by BEIS, but the Programme Coordinator will develop a comms plan to support local messaging at a national level (including Twitter and sharing best practice). Cluster leads will also be supporting local areas. A series of common marketing assets have been developed to support recruitment onto the programme (see shared area). Use of the national branding, consistent with brand guidelines is mandatory.

These can be jointly branded with local logos and used to promote and market the programme.

Setting up cohorts

Typically, the local programme administrator will manage this process. Whilst the action learning methodology is designed to allow individuals to learn from others regardless of their business sector and specific experience, it is recommended that consideration is given to the following aspects of the cohort profile:

- **Size:** larger businesses may face very different issues from very small SMEs e.g. HR. In year 1, some larger businesses felt they would not benefit from being in a network with significantly smaller SMEs and areas set up specific cohorts for larger businesses and vice versa.

- **Sectors:** diversity in the structure of the cohorts in terms of types of business may generate more to share and will encourage cross sector fertilisation of ideas and knowledge. A sectoral approach may have disadvantages in terms of limiting the possible number of businesses that could participate and reduce the opportunity for useful alternative perspectives'.

- **Competitors:** individuals from competing businesses may not wish to be in the same cohort due to likely commercial sensitivities Whilst confidentiality should be paramount to the running of the set, it is inevitable that sensitive information is both presented and discussed. The participating owner/managers will need to be comfortable that the cohort presents a safe environment for them to develop.

- **Diversity:** where possible there should be a balance in terms of gender and all Equalities Act protected characteristic diversity criteria should be considered.

- **Personalities:** the programme does not require formal testing of personality types as the facilitators should be experienced in managing the personalities within the room. However, any existing knowledge of individual personality types should be considered when creating cohorts to ensure they are optimised for team working.

- **Stage of Growth Journey:** consideration should be given to where a company is on its growth journey. Whilst there are opportunities for more mature companies to learn from younger businesses that may be more agile or technologically advanced in an unbalanced group, more mature companies can find they are leant on disproportionately because of their experience. This can be mitigated by ensuring a balanced mix in terms of growth journey or creating cohorts for businesses at a similar stage.

The Peer Network participants' commitment

The Peer Networks programme provides an exciting opportunity to develop the individual skills of business owners and leaders and more broadly advance productivity in the SME community. To ensure maximum impact for the businesses involved – and the funders – participants must be able to commit to attending the full 18 hours of group sessions and access a minimum of 3.5 hours of one-to-one support.

The Peer Networks programme also requires that businesses provide information at entry and exit points and short feedback following each session.

Participants will need to actively engage with the action learning process which requires them to openly explore business opportunities and issues within a group environment and contribute to the success of others.

Delivery partners should ensure each participant is happy to sign up to the commitments in the Peer Networks Programme Participant Charter before they are allocated onto a cohort.

Peer Networks

Programme Management

Department for
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& Industrial Strategy

Programme Management

Communication and Reporting (See also Reporting and Evaluation Framework)

The information reporting metrics for the Peer Networks programme are outlined in the 'Metrics Pack' that accompanies the Playbook. It has been designed to ensure that the performance and benefits of this national initiative are captured and can be understood and that this is based on a common information standard used by all organisations supporting the delivery of the programme.

Delivered locally in England through the Local Enterprise Partnership (LEP) network and their respective Growth Hubs and, or their Delivery Partner(s), the programme's longer-term aims are focused on reducing the UK productivity gap by helping business leaders find practical solutions to strategic and operational challenges. It also forms part of the Government's response to the COVID-19 pandemic, seeking to improve the resilience of SMEs, their capability to adapt their business models to the "new normal" and position themselves for future success, driving longer-term productivity gains in England.

The emphasis is not only on providing a high quality and valued experience for target participants, but to also acquire a strong evidence base that will, through evaluation, assist BEIS in understanding who in the target group benefits most from access to Action Learning Sets and one to one support. This will provide the base data to influence the design of future programmes, who they should be targeted at, the key success factors and mix of service activities needed to deliver the best outcomes for participants and for economic growth generally.

Impact Assessment & Evaluation

Delivery partners are expected to work with the contractors for the evaluation. The evaluation will seek to answer questions about the effectiveness of scheme delivery and early business benefits generated, which will help to inform future programme design and funding decisions.
The evaluation will draw on evidence collected from beneficiary businesses through four main areas:

- Baseline stage – drawing on data **collected by Growth Hubs and or their Delivery Partner(s)** about the supported beneficiaries and their baseline position pre-support.
- Feedback surveys – Administered by the delivery partners/ facilitators, this will provide timely evidence of how the programme is operating.
- Post-completion – the **independent evaluator will issue a survey directly to businesses** shortly after they complete the programme, which will gather evidence on their experience of the support received and immediate outcomes.
- Six-months after completion – the **independent evaluator will issue a survey directly to businesses**, gathering evidence on their experience and the impact on their business.
- Drop out survey - only for participants who dropped out part way through a cohort (who will not receive the post-completion surveys).

The evaluation will also involve a broader range of research tasks including wider data analysis, case studies and consultations with a sample of stakeholders. Representatives from LEPs, Growth Hubs and other delivery partners, Facilitators and supported businesses may be asked to engage with this (although this will not be compulsory).

The baseline data collected by Growth Hubs, and or their Delivery Partner(s) from each business will be requested for use in the evaluation. As part of this pack, a template has been provided to ensure that

information is shared in a fixed format. Full instructions asking you to send this to a secure data point managed by the evaluation partner, for use in the evaluation, will follow in advance of due date.
In terms of post-completion business survey, Growth Hubs will be given advance notice with a copy of the survey for reference. Delivery partners will be provided with some common content that can be used to inform programme participants of the process, the expected level of involvement and the importance of the information.

Contracting

LEPs and local Growth Hubs can choose to deliver the programme using internal resources or procure all or part of the necessary capability from third parties. Information to support procurement is provided in the Procurement Pack.

Quality Management and Assurance

LEPs and Growth Hubs should implement a local quality management and assurance process in line with their existing policies and procedures. It is anticipated that policies will be in place to cover:

1. Staff selection
    a. Recruitment
    b. Induction
    c. Training

2. Operations
    a. Enquiry management
    b. Resource allocation
    c. Workflow management
    d. Reporting and performance

3. Feedback – complaints and compliments process
    a. Client contact
    b. Recording feedback
    c. Action planning
    d. Corrective measures
    e. Process review

4. Control of supplier, contractors and sub-contractors
    a. Selection process
    b. Contractual documentation
    c. Induction
    d. Operational control
    e. Output review
    f. Actions and corrective measures

Participant surveys

The participants will complete a detailed survey at the start, and end of the programme activity and a short satisfaction survey after each session The survey format is set out in the Metrics Pack and the data will need to be recorded on the Dashboard

It is the responsibility of the local delivery partner to ensure that feedback is acted upon in line with their own quality assurance processes. See Metrics Pack for full details.

Observation

The action learning methodology is central to the integrity of the Peer Networks programme. Methods to monitor session quality must be established to ensure programme objectives are realised. A schedule of facilitator observation is recommended.

Observation is expected to be undertaken by an individual from the Growth Hub/LEP network involved in the Programme.

Observation in the context of action learning based peer networks can be tricky due to the confidentiality implicit within the action learning method. There are two potential mechanisms for undertaking virtual facilitator observation:

1. Joining the virtual set for one or more sessions. The observer should be introduced, and their purpose explained but the observer should not contribute to the session directly.
2. Permission is requested to record a virtual session which is then reviewed by the observer offline. The purpose of the recording should be explained and detail what will happen with the recording post-observation confirmed should be deleted once reviewed, or feedback has been given to the facilitator about their performance.

The latter is recommended, as this will feel less intrusive to participants, it is easier to administer for programme managers (it reduces scheduling and coordination challenges for the observer, and allows for the use of different platforms by individual facilitators), and provides evidence to support programme assurance. A random recording cycle should be deployed, with the programme manager selecting sessions for recording, providing at least 24-hours' notice to the facilitator, and issuing a privacy statement to be shared with the cohort. The other benefit of this approach is that it might be used if a member of the cohort is unable to attend a particular session.

Some areas have usefully combined the observation element with provision of extra assistance for the facilitator using a member of the team involved in liaising with the businesses as part of the set up/onboarding process to introduce the session. This has also been useful in ensuring that connections are made, and advice can be provided separately (if required). This may be particularly helpful if the facilitator is not familiar that with the local business support environment or where the 1-2-1 support is being delivered by a different person.

Observation for the purpose of quality and training should be stated within local terms and conditions for both facilitators and participants. (i.e. Participant's Charter)

Observation is a critical component of all the higher-impact professional learning activities and, when part of a wider process of ongoing development and feedback cycles, is a powerful way to build confidence (in deliverers and delivery), provide support and motivation, and help the development of a growth mindset in practitioners.

Observation is part of a series of activities including:

- Objective self-reflection/self-observation
- Collecting and providing feedback
- Peer-observation
- Sharing within a community of practice
- Developmental coaching and mentoring

Observation will support better programme consistency and delivery impact and, if performed correctly, more effective professional learning for those being observed.

There is no set template for recording the results of any observation, but the list below may be useful.

Aspects to consider when undertaking virtual facilitator observation include:

Topic Facilitators use subject expertise, knowledge and practical skills to provide learning opportunities The session content is suitably demanding, inspirational and engaging The session content is appropriate to the peer group and does not lower expectations There is a logical sequence to the session Facilitators react and respond to the specific issues presented by participants within the session Facilitators focus the session topic(s) on specific issues as necessary (core themes and topics provided by BEIS) Clear evidence of planning and preparation is exhibited
Facilitation Facilitators use the principles of action learning to successfully facilitate each session Facilitators demonstrate good technology competency using video conference facilities Facilitators use relevant and appropriate resources during the sessions Facilitators demonstrate good communication skills and good questioning skills Facilitators give explicit, detailed, and constructive feedback Facilitators effectively check for understanding Facilitators champion the programme, its benefits, and its impact on productivity
Behaviour Facilitators develop a collaborative and open culture and supporting behaviours within the session Facilitators create supportive peer session focused on sharing, solving, and learning Facilitators create a focused session through their high expectations for peers Facilitators communicate clear and consistent expectations which are understood and followed by participants Participants are managed effectively and focused on sharing, solving, and learning

Facilitator Action Learning Groups

The programme encourages its facilitators to share best practice, approach, and improvement opportunities to enhance quality and participant experience. This should be undertaken though groups of local cluster facilitators coming together to self-facilitate action learning sets to ensure ongoing development and learning. These could include members of the programme management team and/or Growth Hub staff involved in the programme.

It is expected the Cluster Lead or a nominated Growth Hub Cluster member may want to organise this to support improved consistency and delivery.

Peer Networks

Procurement and Tendering

Department for Business, Energy & Industrial Strategy

Procurement and Tendering

Each individual Local Enterprise Partnership (LEP) or local Growth Hub will be responsible for the tendering and procurement of Peer Network programme suppliers where appropriate. The process will need to comply with public procurement rules and local tendering processes and system. To support this process, the Procurement Pack has been developed to provide national consistency whilst enabling local delivery flexibility.

This is intended to help partners quickly complete their local procurement requirements and support their procurement teams with the core information they will need to procure the programme. The content is written in a style that enables it to be cut and pasted into local tender documents and systems as required.

Peer Networks

Running a Programme of Virtual Sessions

Department for Business, Energy & Industrial Strategy

Running a Programme of Virtual Sessions

The ongoing COVID-19 pandemic and its associated social distancing measures requires that the Peer Network programme continues be delivered via a virtual format It is important to communicate to participants that the virtual format is not inferior – it offers the same benefits as face-to-face peer networks whilst providing efficiencies in terms of time commitment and reduced environmental impact. Research demonstrates that a virtual or audio working environment can bring its own unique benefits to the process.[8] The virtual format can encourage sharpened listening skills, give participants time to reflect in greater depth and develop more advanced virtual leadership skills which are very important in the current business environment.

Subject to the lifting of COVID-19 restrictions, decisions on whether to deliver any sessions and 1-2-1 support virtually or in person are a matter for local discretion, bearing in mind the overall budget per cohort

Technology Platforms

There are several prominent technology platforms that can be used to host a virtual Peer Networks session.

As a minimum it is recommended that the chosen platform allows for:

- Flexible licensing to cater for large or small numbers of users
- Hosting for up to 3 hours without any forced break in the service
- Both computer and telephone dial in
- Multiple video streams of users
- Allocation of meeting roles-including ‘Host’, ‘Presenter, and ‘Participant’
- Live computer ‘Desktop’ sharing
- Live and interactive ‘Whiteboard’ for collaborative visuals and diagrams
- Enabled waiting room or lobby with ‘admittance’ controlled by the meeting host
- Meeting lock
- Recording functionality
- Live chat or comments stream
- Virtual ‘hand raising’
- Security encryption

Platforms that offer the above functionality include:

- MS Teams
- Zoom Meetings
- WebEx
- GoToMeeting
- Google Meet

It is likely that a subscription level service will be required and anticipated that the technology will be hosted and provided by the local delivery provider. Technology provision should be negotiated and confirmed during local procurement activity.

Technology Support

Due to its virtual format, the success of the Peer Networks programme is heavily dependent on the functioning of the underlying technology. Whilst the facilitators will be experienced in running online sessions – and the

[8] Dickenson, M. et al (2008) e-Learning Papers - Virtual action learning: What’s going on? Barcelona: e-learning Europa

participants likely well versed in the complications of online meetings – stressful situations should be alleviated by developing clear protocols for common scenarios. This also protects the programme brand.

Delivery providers should provide a contact number for an appropriate person outside of the session who can be contacted if the participants or the host experience connectivity problems. This person can inform the host of individual problems or communicate group-wide issues as necessary.

Administration and Scheduling

To give participants maximum foresight, all Peer Network sessions for a cohort should ideally be scheduled at the outset with the optimal frequency recommended as fortnightly. However, this is subject to local discretion - provided that all cohort sessions and 1-2-1 support are completed between 1 April 2021 and 31 March 2022.

Experience with the first year of the programme has shown that 3 hours is around the maximum ideal length for any session; especially as sitting in front of a screen. Some areas have adopted an approach with the first and/or final sessions being 3 hours long and the remainder shorter.

In terms of the frequency of sessions, some have flexed timings guided by the individual group's wishes and availability – with some requesting more frequent sessions and others (e.g. one with medium-sized enterprises) wanting monthly sessions.

Along with the schedule, the participant should be given information about the technology platform that will be used to host the sessions and how to download any necessary software. If not included in the initial schedule, joining instructions for sessions should be circulated no later than 48-hours before each session start.

Except in exceptional circumstances, participant attendance should be considered mandatory at all sessions. Making a commitment to attend is central to the action learning ethos and should be encouraged – see Participants Charter.

One-to-one support can be arranged and scheduled separately as it will reflect the individual business needs and the timing of those. Support can begin at any point after the first Peer Network session to the group.
Decisions on timing of 1-2-1 sessions are at local discretion. See section on 1-2-1 support provision for further guidance.

Resource Requirement

In most instances the facilitator will be managing a virtual room of no more than 11 participants. It is assumed that sessions can be competently run by a single facilitator. Whilst 'set' management can be determined at a local level it should be noted that the introduction of a second facilitator or support person may change the dynamics of the set and the action learning methodology. In year 1 of the programme, some areas found it useful to have a person involved in the recruitment/onboarding process and/or with knowledge of wider business support offers to support the facilitator.

How does the Peer Networks programme leverage Action Learning?

The Peer Networks programme will drive business productivity and growth by using an action learning methodology to help business leaders to support each other to actively address business challenges and opportunities. At its heart, action learning is about effecting change.

What is action learning? *(See also Annex 2 Action Learning in Practice)*

Action learning is an approach to problem solving and learning in groups to bring about change in individuals, teams, organisations and systems. It is based on the principle that the most effective learning takes place in the context in which people are working[9]

The concept was developed in 1982 by Reg. Revans. It is based on his premise that: *"there can be no learning without action and no action without learning".* Revans suggested to learn we must combine traditional instruction or 'Programmed Knowledge' (P) with critical reflection or 'Questioning Insight' (Q). This can be expressed as a learning equation:

$$L = P + Q$$

Programmed Knowledge (P) – knowledge which is already known and in current use (taught and read) to tackle a problem/issue (includes advice).

Questioning (Q) – the process of finding the right strategy to use in the circumstance and finding a way to use it most effectively.

Learning (L) – comes from selecting the strategy and using it in practice[10].

Working in small groups known as 'sets' a cohort of participants tackle important organisational issues or problems and learn from their attempts to change things. Sets bring people together to:

- Work on challenges and problems – this must be a voluntary commitment
- Work on problems or solutions that personally involve the set members.
- Check individual perceptions of the problem, to clarify and make it more manageable, and to create and explore alternative actions
- Act in light of new insight – an account of what was done and how this changed things should be bought back to the set for further shared reflection and exploration
- Provide a balance of support and challenge to enable each member to act and learn effectively[11]

The action learning methodology encourages three levels of learning:

1. The specific issue being discussed

[9] Virtual Action Learning, NLIAH, 2012
[10] Virtual Action Learning, NLIAH, 2012
[11] Action Learning for Managers, Mike Pedler, 2008

2. What is being learned about oneself
3. The process of learning itself i.e. learning to learn

Action learning operates using the following mechanism:
- Participants meet in a group (known as a set)
- Each participant brings a 'problem' to the action learning set that they wish to progress
- Each participant is allocated time to 'present' and explore their problem
- Taking it in turns, the whole set works for the benefit of the person presenting the issue, using insightful questioning to challenge the presenter about their problem
- The aim for the individual presenting the issue is to be able to act on the issue and to reflect and learn from the action
- Typically, an action learning set meets for up to 3 hours every 2-3 weeks over an agreed period
- The set creates and agrees explicit ground rules (e.g. confidentiality) to build trust and ensure effective working

Important processes within set operation include:
- **Presenting:** participants present their views or perceptions of the problem or opportunity they are tackling. This can include confidential information about their organisation as well as self-disclosure about feelings, hopes and fears.
- **Questioning:** in response to participant presentations and status reports. The aim is to ask the questions that help the presenter consider their challenge from a new perspective.

Why are we using it?

The action learning methodology provides a proven framework and mechanism to underpin the Peer Networks programme. It provides a simple, consistent approach to programme delivery that can be easily replicated in different geographies and with different cohort profiles.

Using action learning principles differentiates the programme from informal networking and support offers and enables participants to learn and develop as individuals whilst tackling business challenges and opportunities that will help drive up UK productivity. Evidence indicated that Peer Networks can result in 2.5% higher labour productivity.

Consistency and Standardisation

The facilitator must ensure that each session is run according to action learning principles, using an action learning methodology. The programme assumes that facilitators have experience of the action learning format and will use their experience and great facilitation skills to lead participants on a journey of action, learning and development.

The programme provides a video recording of a Facilitator 'Best Practice' webinar workshop that took place during Year 1 of the Programme to assist with programme orientation,

Flexibility in Session Structure

The facilitator can establish their own session structure for a session providing it adheres to action learning principles. The first session is likely to follow a different format to later sessions as the facilitator will need to establish the ground rules for the set and introduce the action learning format.

Common session elements could include:

- Informal catch up – 15 mins at the start of the session to allow for unstructured chat amongst participants
- Topic selection
- Allocating time
- Main discussion facilitated through action learning mechanisms
- Completing participant action records
- Reviewing overall performance of the cohort, reflecting on how well the group uphold the action learning methodology

Facilitators should use the Facilitator Notes template (see Template Pack) to keep a record of the issues brought to each meeting, the actions each presenter agrees to take and notes on any process issues occurring in the group

The BEIS Core Topics: a springboard to success

The Business Productivity Review found that one of the contributory factors to the UK's long-standing productivity puzzle was that businesses were not always aware that they suffered from productivity problems. To address the productivity issue as well as tackle other pressures associated with COVID-19 and the UK leaving the European Union, the facilitator will empower the group to decide which session topics they want to focus on that may be hindering productivity and business growth. Typical topics include but are not limited to:

- General
    - Finance
    - HR
    - Sales and Marketing
    - Business Model Innovation
    - Change Management
    - Embedding formal management processes and systems
    - Digital (including adoption and implementation of technology, cyber security)
    - Use of data to drive value in the business

- COVID-19
    - Adjusting to social distancing and the impact on business, operational and finance models
    - Its impact on organisational culture
    - Management of staff on/off furlough
    - Fear of a further lockdown
    - Redundancy – emotional, impact on cash and culture

- The impact of net-zero carbon emissions on UK business
    - Understand what net-zero carbon means
    - How to calculate carbon footprints
    - Reducing carbon through efficiencies, innovation and behaviour change
    - Thinking creatively about carbon reduction activities that can make a difference

- Being out of the European Union
    - Compliance with trade requirements and tariffs

- Changes in sources of funding
- Staff employment requirements
- Supply chain issues

The session should remain participant focused with groups selecting the issues that are most relevant to them. Experienced facilitators will use the high-level topics as springboards to focus on participants specific needs, including wider issues that may be affecting their sector, locality, or business model.

What should be provided to participants?

The programme does not provide a standard participant pack that should be used to onboard participants. If desired, this should be created and disseminated locally. Useful information for delegates might include:

1. Programme introduction and overview
2. Introduction to the action learning methodology
3. The role of the participant – see the Action Learning in Practice section and refer to the Participant Charter document
4. Choosing and presenting a problem – see the Action Learning in Practice section
5. Asking insightful questions – see the Action Learning in Practice section
6. Session review sheet – the Participant Action Card (see Template Pack)

Given the virtual format of the programme paper-based assets should be carefully considered. Digital materials may be more accessible and environmentally friendly than hard copy.

Peer Networks

Facilitating Peer Networks

Department for Business, Energy & Industrial Strategy

Facilitating Peer Networks

Facilitators responsible for running a Peer Network will be asked to join a virtual programme orientation session. This will be a short session focused on positioning the programme and communicating its aims and objectives with a view to achieving consistency in messaging across Peer Networks. The orientation session will not teach facilitation or action learning techniques in any depth but will provide guiding principles for the programme.

The role

The main duties of the facilitator include:

- Agreeing with participants how to maximise opportunities within their existing business
- Encouraging participants to express and discuss their ideas, concerns and understanding of the business situation facing them
- Helping participants to review their progress and identify realistic and practical options to realise their goals
- Helping participants to reflect on and learn from things that did not turn out as expected
- Signposting participants to other sources of information, advice or further support when appropriate
- Encouraging participants to take responsibility for their own decisions, plans and actions
- Encouraging participants to work together to agree both group and personal objectives
- Facilitating group discussions within the cohort and dealing with group dynamics and conflict.

Session management

Facilitators are responsible for the week-to-week management of their Peer Network and should perform the following tasks:

- **Schedule sessions and send invites** (where this is not being done by administrative support) – all sessions scheduled at the outset, with specific joining instructions circulated no later than 48 hours before each session. Text reminders are a useful tool here.
- **Host each session on their chosen virtual conferencing platform** which must meet programme minimum requirements
- **Record attendance at each session**
- **Promote good discipline around attendance** and follow up on absences
- **Use an action learning methodology** to structure and manage sessions
- **Direct participants to capture actions** from each session in the Participant Action Learning Session Record (Action Card) – see Template Pack
- **Direct participants to complete evaluation surveys**
- **Complete the Facilitator Notes for each session** and report hot topics – see Template Pack
- **Identify potential for additional support** and liaise with the project manager to connect participants with additional one-to-one support, and complete the One-to-One Support Action Plan – see Template Pack
- **Inform the project manager of any participants who disengage with the programme**
- **Notify participants if a session is selected for observation**
- **Raise any conflict of interest issues**

Effective Virtual Facilitation

The facilitator will need to use the breadth and depth of their skills to ensure that the virtual environment is as engaging, rewarding and energetic as an in-person session would be. The role of the facilitator remains consistent with that of a facilitator in a face-to-face session[12]:

Things to do	Things to avoid
▪ Highlight untested assumptions and ask for specific evidence ▪ Model effective behaviour and language ▪ Use action learning principles to create a structure for participants to explore their problems ▪ Help each participant stop, think, question and listen about their own issue ▪ Help the set to ask appropriate questions and find the right process so that the participant presenting the question can explore and learn from their own issue ▪ Encourage awareness of learning - how/when/what are the learning opportunities ▪ Keep aware of the action learning process and appropriately draw it to the attention of set members ▪ Ensure that the views of group members are drawn out and that every participant has an opportunity to contribute	▪ Providing solutions ▪ Being an expert ▪ Exerting too much control ▪ Sorting out interpersonal problems that arise between set participants ▪ Giving advice or talking too much ▪ Letting energy levels in the group drop too low – try different ways to engage around a topic

Specify How Participants Should Virtually Interact

Most video conferencing platforms have functionality designed to allow for participant engagement in the online environment. These include raising a virtual hand and chat functions. The facilitator will need to establish the mechanism through which they will structure the group discussion. Direction should be provided to the group on when/how/if these functions will be used.

Communicating the Back-Up Plan

It is the facilitator's responsibility to ensure that appropriate technology support is available and that participants have a clear understanding of what to do if something goes technologically wrong. It is recommended that participants are provided with a designated contact outside of the session with whom they can communicate connectivity issues and problems.

Appropriate protocols might include:

- **The entire online session freezes or disconnects**: participants should initially attempt to reconnect on the original link, if that fails they should attempt to telephone dial-in on the associated conference line, if neither of these work the participant should contact the facilitator ~~wait for at least 10 minutes~~

[12] Virtual Action Learning, NLIAH, 2012

for further email instructions from the host before contacting the named contact and moving on to other activities.

- **Participant is having problems with internet stability causing poor sound quality, image pixilation or freezing:** if possible, the participant should indicate via the chat function they are experiencing problems. The participant should first switch off video. If this does not work, then they should disconnect from the call and attempt to re-join the call using the telephone dial-in number provided on the invitation.

Emphasising Active listening

Active listening is a critical skill when using the action learning methodology. Active listening is the process by which an individual secures information from another individual or group. It involves paying attention to the conversation, not interrupting, and taking the time to understand what the speaker is discussing. Participants should be directed to focus on the session and refrain from multi-tasking e.g. checking emails or working in the background.

In a face-to-face situation body language cues such as head nodding and leaning forward demonstrate that an individual is actively listening. In a virtual environment this is harder to ascertain.

Talking with no visual or verbal responses can be off-putting for the participant presenting, so cameras should be on and the facilitator should teach participants to give visual (i.e. nodding etc) or (unless on mute) verbal indications that they are listening e.g.

- “OK”
- “mmmmmm”
- “I see”
- “aaah”

This will encourage presenters to continue talking and help build rapport within the set.

Knowing Who is Talking

Whilst most video conferencing platforms will indicate who is speaking there will be instances where participants interject or make short comments that are not picked up by the software. It could therefore be useful to learn to identify participants by the tone of their voice. Developing an appreciation of each participant's vocal characteristics can help identify the speaker when the technology does not register who spoke. For example, in terms of volume are they loud or quiet, do they talk quickly or slowly, is their tone hard or soft and their pitch high or low. Quickly identifying a participant by their voice profile can help conversation flow and keep facilitators on the front foot.

Establishing Ground Rules

The facilitator should establish clear ground rules that govern the behaviour inside and outside of the set. These should be developed and agreed upon by the cohort during the first session. Common ground rules include:

1. Confidentiality – what is discussed in the set is not spoken about outside the group. What this means should be explored. Can I talk to people outside about my action? Can I tell my mentor what goes on? Clarification is important.
2. Cameras on. Mute if any background noise/when not speaking.
3. Commitment – participants should commit to attend and give a good reason if they cannot.
4. Everyone has a right to time to speak – but they do not have to use it if they do not want to.
5. Listening is essential – everyone should be listened to.

6. It is good to support and challenge each other but judgement should be withheld.
7. The group should provide a safe environment where it is ok to admit needs, weaknesses and mistakes.
8. Punctuality is important – the session should start and finish on time.
9. Members should keep a record of progress on their problem and action taken.

Ensuring Quality of Delivery

Observation (See additional section above on Observation)

The programme will manage quality under its quality assurance framework, using surveys and the observation of sessions. Facilitators should anticipate that at least one session will be observed by either the project manager or a quality manager. This could involve the observer either sitting in the virtual session or requesting for the session to be recorded. A minimum of 24-hours' notice should be given.

If a session is chosen for observation it is the facilitator's job to communicate the nature and purpose of the observation to the participants at the start of the session.

Facilitator Peer Networks

The programme encourages facilitators to join a local facilitator cohort comprising other facilitators delivering the Peer Networks programme and representatives from the local LEP or Growth Hub. These virtual sessions would be self-facilitated and can be used to resolve common programme problems and share best practice.

Resolving problems, issues, and clashes

It is inevitable that on occasion problems will arise relating to personality clashes and disagreement between set participants. The facilitator should look to address this through robust facilitation and use the reflective nature of action learning to focus the set on thinking about their individual behaviours and the overall performance of the cohort.

Where personality conflicts cannot be resolved, or in instances of emerging competition not foreseen at the outset, it may be necessary to move an individual to a new cohort. This would need to be discussed with the local project manager as in most instances it would be undesirable to integrate a participant into an existing cohort. They would need to join a new cohort at the start of its journey, and this should be considered a last resort.

Peer Networks

One-to-One Support Provision

Department for Business, Energy & Industrial Strategy

One-to-One Support Provision

The Peer Network programme provides access to additional one-to-one support for each participant. It is expected that all participants will receive at least 3.5 hours of one-to-one support. This can begin at any point after the first Peer Network session is complete.

Subject to the above point, decisions on timing of 1-2-1 sessions are at local discretion. Holding sessions interspersed with or after the group sessions would give participants a better idea of what to focus on. The expectation is that some of the 1-2-1 support session(s) will include development of an action plan, so this needs to follow the first group session. It can utilise highly competent business coaches, mentors or advisors, the local advisor network, or existing local business support programmes. The purpose of this support is to help to implement and manage change. It will be the facilitator's responsibility to identify where a participant will need deeper support that be delivered by them as part of the programme, or through referral to other services advised by the Growth Hub.

When provided within the programme, the role requires the provision of one-to-one follow-on business-focused coaching, mentoring, or advice to individual participants through a mixture of consultations and signposting.

The requirement can also be met through other existing local activities – see the section on Working with Existing Local Programmes.

The role

The main duties of the One-to-One Support Provider include:

- Analysing the specific challenges faced by the business and what actions should be taken by the SME participant to tackle them in conjunction with their learning from the Peer Networks
- Agreeing with the SME participant ways to maximise opportunities within their existing business
- Encouraging the SME participant to express and discuss their ideas, concerns and understanding of the business situation facing them
- Supporting the SME participant in creating both business and personal objectives and goals
- Helping the SME participant to review their progress and set realistic and practical options to realise their goals
- Helping the SME participant to reflect on and learn from things that did not turn out as expected
- Signposting the SME participant to other sources of information, advice or further support when appropriate
- Encouraging the SME participant to take responsibility for their own decisions, plans and actions.

Delivering Virtual One-to-One Support

The Peer Network programme will be delivered via a virtual format given the COVID-19 pandemic. The virtual format offers some potential benefits associated with flexibility:

- Enabling shorter sessions without the challenges associated with travel time, allowing a greater number of shorter sessions
- Allowing the opportunity for flexible delivery outside traditional working hours (if this suits the participant and provider).

There are other benefits as the virtual format acts to focus listening skills and the process increases participant familiarity with the use of virtual networking. Other people can also be brought into the session much more effectively (and efficiently) allowing for the virtual introduction/handover of participants to other potential connections, contacts, and those representing support programmes.

Technology Platforms for One-to-One Support

There are several prominent technology platforms that can be used to host a virtual one-to-one support session. The chosen platform should provide a secure, professional environment for the sessions. Video conference platforms can be used, and suitable ones include:

- MS Teams
- Zoom Meetings
- WebEx
- GoToMeeting
- Google Meet

It is likely that a subscription level service will be required and anticipated that the technology will be hosted and provided by the local delivery provider. Technology provision should be negotiated and confirmed during local procurement activity.

The nature of the one-to-one support does allow for delivery through one-to-one video call technology such as:

- FaceTime
- WhatsApp Video
- Skype
- Google Duo

These can sometime offer more communication flexibility for the participant and should be utilised if requested.

Phone calls or telephone dial can be used as a back-up option, but preference should be given to video meetings where possible.

Duration and Frequency

There must be a minimum of 3.5 hours of individual one-to-one support provided. The support should be bespoke and relevant to the identified businesses needs of a participant. The timings, pace and structure of the one-to-one support sessions should be agreed with each participant. It may be appropriate to use the available time to deliver support through a series of short regular sessions or hold a longer initial session and shorter follow-on sessions to help drive the activity. All one-to-one support sessions must be completed by 31 March 2022.

Administration and Scheduling

The responsibility for scheduling the one-to-one support sessions lies with the provider (unless alternative arrangements have been agreed with the local programme administrator). When scheduling each session, the participant should be given information about the technology platform that will be used to host the session(s) along with details of how to download any necessary software. Joining instructions for the session(s) should be circulated no later than 48-hours before the start of the session.

Providers should be supportive and flexible in their approach, recognising that participants may face urgent business challenges or have opportunities to respond to that require the rescheduling of sessions. The virtual nature of the programme should give providers more flexibly to accommodate their requests wherever possible. However, it is recognised that providers have other clients, commitments and responsibility, and there may be time when such change (particularly if repeated) cannot be accommodated. Alternative arrangements should be made (in consultation with the project manager) to deliver the required 3.5-hour support.

All 1-2-1 sessions should take place or be scheduled within one month of the end of the final group cohort session; and be completed by the end of March 2022 at the very latest.

Effective Virtual One-to-One Support

Rapid Relationship Building

Most providers will have extensive experience of face-to-face support, but the delivery of one-to-one support in a virtual session requires enhanced interpersonal and communication skills. Nonverbal communication is much harder to pick up using video conferencing, so effective verbal communication becomes even more critical.

Quickly building rapport is vital to the success of the one-to-one support and providers should work hard to quickly create relationships: listening fully, questioning and probing, challenging, summarising and playing back statements to demonstrate comprehension. Providers should adapt their communication styles to fit the client and the circumstances.

Focusing Support

The nature of the one-to-one support provided will depend on the specific needs of the participant. Providers will need to work to ensure that the right support is provided at the right time, and balance the benefits associated with provision of direct and immediate support (using the 3.5 hours provided under the Peer Networks programme) against the benefits of signposting and referral into other business support programmes which are likely to offer more significant support in the medium-term.

Providers should ensure they have a good view of the local publicly funded business support landscape to ensure they maximise the use of the services on offer and prevent/reduce duplication during the one-to-one support provision.

The required one-to-one support will be client-led and could cover any of a wide range of business challenges. These are likely to involve the transfer of skills and knowledge from the one-to-one support provider into the business. The provider should deliver highly-customised support sessions focused on key issues – typically whichever of the following themes are of most relevance to the participants:

- Help to implement and manage change, or support to manage complex projects
- Support to develop/refine strategies or plans associated with sales and marketing, growth, innovation, resourcing etc.
- Help to apply learning and embed new or enhanced business processes or practices
- Introducing new management insight and methodologies
- Developing effective value propositions, business models and pricing strategies
- Support to build and enhance their business development capabilities

- Providing connections to other networks, centres of excellence, the knowledge base, and support organisations
- Encourage the personal development of the leader, improving decision making and confidence
- Focused support to enhance business development capabilities
- Tackling people issues, including effective recruitment, building high-performing teams, creating a high-performance culture
- Organisational development, including financial controls, building management information and KPI development and management
- Increasing organisational creativity and innovation, more effective new product and service development
- Support to increase investment readiness and help to access to finance
- Accelerating technology adoption and transformation
- Help to change behaviours and improve business performance

Engagement Approach

One-to-one support under the Peer Networks programme is focused on improving business and organisational performance, leveraging the personal development gained through the Peer Network sessions and action points developed. The programme recognises that one-to-one support may run along the wide spectrum of coaching, mentoring, facilitation, consultancy, and advice. Sometimes several – or all – of these will happen during a single session with a participant. The critical aspect is for the participant to get the right information, advice and guidance at the right time, from the right person/provider/resource.

At the start of each engagement providers will take time with the participant to fully understand their business challenges, and map out how the one-to-one support could help their business. A short action plan will be developed setting out a mixture of strands to address with the provider in the subsequent sessions, through work with other external provision (via signposting and referral out), and for the participant to action post-session.

Although the GROW model[13] is arguably the most famous *coaching* model, the approach can be applied to the provision of broader one-to-one support – particularly if it is broadened out to GROW(TH):

- **Goal** – agree a clear end state (or target, outcome or goal) for the participant and their business
- **Reality** – test where they are, where they are going and what the gap is
- **Obstacles** (and Options) – exploring what stands in the way of the participant reaching the goal
- **Way** forward (Will) – developing actions which the participant will take forward
- **Tactics** – select the methods and strategies (or partners) needed to make it happen
- **Habits** – identify what habits need to be formed to sustain it going forwards

The participant is accountable for progressing their actions in between sessions, so that they can be reviewed in a meaningful way. The results of their actions are then considered, and the plan adjusted for next steps.

A key part of the one-to-one support is the facilitated connections made to specialists, centres, facilities and complementary programmes. This includes connection back into (or onto) appropriate LEP/Growth Hub support, referrals onto other publicly funded business support programmes, and links into other sources of

[13] Originally developed in the 1980s by Graham Alexander, Alan Fine, and John Whitmore. Formalised by the publication of *Coaching for Performance* by Sir John Whitmore in 1992.

help, guidance and support. This requires a good knowledge of the types of business support available to small and medium enterprises at a local, regional and national level (including social enterprises, charities, community groups and voluntary groups).

When the sessions are complete, the one-to-one support provider will complete the required participant action records and liaise effectively to support the appropriate LEP/Growth Hub account management activities.

Provider Behaviours

Providers must give objective and informed advice in an impartial manner and act with absolute transparency. They should review their own working practices to assess whether they meet the ethical and professional standards expected of business advisers, coaches, mentors, or consultants. They should frequently review and assess their own continuing professional development needs and identify improvements that could be made to their own working practices.

It is the duty of all providers to disclose any conflict of interest or any circumstances that might reasonably give rise to the perception of conflict of interest. Apparent or perceived conflicts of interest can be as damaging as actual conflicts of interest. Providers must seek to avoid any relationship, influence or activity that will weaken or damage, or appear to weaken or damage, their ability to do their job or make fair and objective decisions when performing the role, or that is not in the best interests of the programme or its stakeholders.

Providers of one-to-one support may be asked by the client to continue to support and assist them once the programme support has ended. It is also recognised that some providers may also have a prior relationship with a participant. The programme will not place restriction on providers continuing to work with participants (or their businesses) on a private commercial basis when the Peer Networks programme work is complete. However, providers should notify the programme that they are working with programme clients directly for reporting purposes.

Meeting the One-to-One Advice Requirements Through Existing Local Programmes

The one-to-one support available through the Peer Networks programme can also be delivered by existing local programmes, where appropriate and where available. It must be a minimum of 3.5 hours. The requirements for this are set out in the section on Working with Existing Local Programmes.

Peer Networks

Reporting and Evaluation Framework

Department for Business, Energy & Industrial Strategy

Reporting and Evaluation Framework

The Peer Networks programme will run until March 2022, ~~with such a short and demanding delivery window~~ It will be important to get the most out of the reporting process so the maximum amount of learning can be derived from the programme. This together with evaluation evidence will provide a sound foundation for future developments.

Data captured on individuals and their businesses will need to be stored locally on local CRM systems so the details of these individual participants can be made available (exported) to the independent evaluation partner for analysis.

Local Management Information (CRM) systems will need to be capable of producing and storing reports, which provide aggregated KPI performance data on a monthly basis. This information is intended to be reported by inputting this into the Peer Networks Dashboard**. Data will need to have been inputted by the 7th day after month end.** A secure password protected log in will be provided for programme administrator to enter this data via the dashboard**.**

Information contained within the Peer Networks Dashboard will be accessed by the programme co-ordinator, BEIS and the independent Evaluator using Microsoft Power BI to deliver reporting functionality. The aggregated information will be presented through specific reports, typically this will produce:

- National level data
- Cluster level data
- Individual Growth Hub level data
- Supporting narrative

A short monthly meeting with each cluster will be held to review progress and performance, raise any issues, ask questions and share feedback with the Programme Coordinator and BEIS. These will be arranged and chaired by the Programme Coordinator with an attendee from BEIS.

Summary of baseline survey data collection topics

The following are examples of the topic areas that may be asked about at baseline for evaluation purposes. These may be subject to change following prioritisation and input from the incoming evaluation contractor.

Topic	Rationale
Adapting to the economic impacts of COVID-19/other economic shocks	A key objective of the programme, since it has been repurposed for COVID-19, has been to enable businesses to adapt to the impacts of COVID-19. This involves both mitigating the negative impacts of the economic situation and exploiting any relevant opportunities, so we would like to measure whether the programme encourages businesses to do either.
Resilience	A key objective of the programme is to increase SME resilience. We will define resilience in line with the ERC definition: 'Resilience is a strategic objective intended to help an organisation survive and prosper. A highly resilient organisation is more adaptive, competitive, agile and robust than less resilient organisations and rebounds from adversity strengthened and more resourceful'. Questions will be based on the literature which includes an ERC literature review.
Leadership and management	This is one area that may be covered in Action Learning Sets, and therefore we would want to measure whether it has been improved by the programme. Leadership and

	management may be a priority topic, given the importance of management practices to firm-level productivity, as indicated by the Business Productivity Review. Questions to measure this are likely to be based on those in the Management and Expectations Survey (ONS).
Recruitment and retention of staff/HR	This is a topic that may be covered by Action Learning Sets, and therefore we would want to measure whether the programme has improved participants' abilities or intentions in this area.
Technology adoption	This is a topic that may be covered by Action Learning Sets, is considered to be important for productivity, and may have had an important role in adaptation to the impacts of COVID-19. Therefore, we would want to measure whether the programme has improved capability or influenced intentions in this area.
Networks	One of the programme objectives was to meet a latent demand from SMEs for high-quality peer networks. The programme is also targeting increased awareness of and engagement with business networks, and maintenance of the network after the programme. We would aim to baseline business awareness of and engagement with networks, to determine whether the programme has had a role in changing this.
Growth ambition	This forms a good shorter-term proxy measure for growth and productivity, so we may wish to measure it to have an indicator of whether the programme will impact on these areas.
Business planning	This is a good indicator of business performance in the near future, so another potential proxy measure of growth and productivity. It also may be covered by the Action Learning Sets.
Use of data	This is a topic that may be covered by Action Learning Sets, and therefore we would want to measure whether the programme has improved participants' abilities in this area.
Change management	This is a topic that may be covered by Action Learning Sets, and therefore we would want to measure whether the programme has improved participants' abilities in this area.
Innovation	This may be an area to be targeted by the programme. It is connected to both the shorter-term objective of responding to the impacts of COVID-19 and the longer-term objective of eventually improving firm-level productivity.
Business confidence	COVID-19 has had a significant impact on business performance and the confidence of business leaders to date. In providing immediate support to some or all of the above areas, the programme may improve overall business confidence, so we would capture this by measuring confidence at baseline and after the programme.

Peer Networks

GDPR

Department for Business, Energy & Industrial Strategy

UK GDPR

For the purposes of this programme BEIS will act as the Data Controller and each LEP/Growth Hub will be Data Processors or Sub processors. All delivery organisations in this programme will be required to comply with UK General Data Protection Regulations (UK GDPR) the Data Protection Act 2018 along with the law relating to these regulations and the processing of Personal Data and privacy as set out in the BEIS Grant Funding Agreement. This includes:

- Ensuring a Privacy Notice is in place where appropriate in accordance with UK GDPR and ensuring that any suppliers comply with the terms of this set out in the BEIS Grant Funding Agreement.
- Not transferring Personal Data outside of the UK unless the prior written consent of BEIS has been obtained and a range of conditions have been met.

All businesses referred from the national Peer Networks landing page will be required to be provided with a copy of the Local Growth Hub Privacy policy before further information is captured and stored. The Peer Networks registration template will contain suitable content where a link to local policy can be added.

LEPs/ Growth Hubs should ensure that their current data sharing provisions allow for key programme data including details of businesses and participants to be shared with the evaluation contractors. **This may mean that privacy notices need to be updated.**

Peer Networks

Post-Programme Sustainability

Department for Business, Energy & Industrial Strategy

Post-Programme Sustainability

Keeping groups going

The relationships formed between peers, when facilitated to share and consider each other's business challenges, often continue to be valuable long after the formal interventions have completed. The length of each Peer Network enables deep and meaningful relationships to build and develop as business owners and entrepreneurs share pain and good practice – and celebrate success. As individuals build trust in each other, an intimacy develops that helps form a community that wants to continue to help and support each other beyond the end of the programme.

Once understood and practised, the action learning skills and technique used in the facilitated process can be used to continue the group support once the funded activity has completed. Since participants are familiar with the process and format they can continue, with sessions becoming self-facilitated by the group members. Contact details are exchanged, WhatsApp groups formed, groups continue to meet as a whole – or in part – after the formal programme has ended.

By creating an effective cohort, the programme helps build individual 'communities of practice' which encourage a social and continuous learning culture. This creates genuine sustainability with very little need for financial or coordination support.

The Peer Networks programme funding does not allow for follow up activities. However, various approaches have been adopted locally to build on the networks. Examples of these and other approaches adopted following other networking approaches include:

- Setting up Whats App groups
- Connecting on Linkedin
- Events bringing together cohorts to self-facilitate learning.
- Events for participants focused on particular areas of interest – with expert speakers

Asking cohorts if they were willing to pay a nominal fee per session to maintain facilitated sessions did not result in enough interest and commitment. Another approach which is being tested is seeing if the cohort could self-facilitate – which relies on members of the group taking responsibility.

Other Business Support

Other national and local business support products may be suitable for participants. On a national level, these include:

Help to Grow: Management

From June 2021, small businesses will be able to access a 12 week-programme delivered by leading business schools across the UK. The programme will combine a practical curriculum, with 1:1 support from a business mentor, peer-learning sessions and an alumni network.

30,000 places will be available over 3 years. The programme is 90% subsidised by government – participants will be charged £750.

The programme includes some networking activities but does not use Action Learning Sets. It is complementary to the Peer Networks programme and participants in either scheme may apply for the other. However, there are different eligibility criteria.

Help to Grow: Digital

From Autumn 2021, small businesses will be able to access free impartial advice on how technology can boost their performance through a new online platform.

Eligible businesses will also be able to get a discount of up to 50% on the costs of approved software, worth up to £5,000. All businesses will be able to benefit from free online advice on the platform. Full details on the businesses and software eligible for the voucher will be published this summer.

Details of both the Management offer and “Help to Grow: Digital” are available at https://helptogrow.campaign.gov.uk/

The Business Support Helpline:

The Business Support Helpline is a free, virtual multi-channel advice and guidance service, operating across England, which can help all businesses, from those thinking about starting a business, through to those who are already established and trading. https://www.gov.uk/business-support-helpline

Please go to www.Gov.uk for other sources of business support

Peer Networks

Annex 1

Department for Business, Energy & Industrial Strategy

Peer Network Facilitator Profile and One-to-One Support Provider Profile

This section provides an ideal profile for a Peer Network Facilitator. It also provides a profile for a Peer Network One-to-One Support Provider where such support is provided directly as part of the programme.

Peer Network Facilitator

The Peer Networks programme will see the creation of series of Peer Networks in each LEP area, which will be delivered by Growth Hubs across England. Each will harness action learning to gain powerful results for the participants helping them to explore new thinking or opportunities, or find ways to overcome difficulties, or address other challenges.

The role of the facilitator is critical to the successful management and optimisation of an individual Peer Network – supporting the rapid building of trust and collaborative relationships between participants within the peer group (the cohort), providing strong leadership and direction, and driving the in-session action learning process to deliver tangible actions and solutions for each member of the group.

The facilitator has three main strands of responsibility:

- Management and direction of their individual Peer Network(s) and its successful facilitation using the principles of action learning
- Individual one-to-one communication with each participant to support reflection and provide signposting to the most appropriate local support
- The capture of information, data, and insight to help inform the contract manager and programme about frequent hot topics for delegates

The role

The main duties of the facilitator are to enable participants to get the most benefit from their cohort experience. This should include encouraging participants to:

- Express and discuss their ideas, concerns and understanding of the business situation facing them
- Reflect on and learn from things that did not turn out as expected
- Take responsibility for their own decisions, plans and actions
- Work together to agree both group and personal objectives
- Undertake constructive exploratory discussions within the cohort and avoid conflict.
- Maximise opportunities within their existing business
- Review their progress and identify realistic and practical options to realise their goals
- Connect with other sources of information, advice or further support when appropriate.

Working to action learning principles, the group facilitator will have the ability to:

- Respect the needs of participants
- Listen and respond effectively and check understanding
- Keep their promises
- Empathise with a range of different feelings and experiences
- Build and maintain an effective relationship with their participants
- Manage group dynamics and deal with conflict
- Generate creative energy within the cohort
- Develop a resourceful state in others
- Handle and respond effectively to change

- Encourage the group to focus on the output
- Shift group and individual perspectives
- Evaluate people and processes
- Ensure the people involved retain ownership of the solutions arrived at
- Challenge people to think.

The requirements

Facilitation of the Peer Network

- Facilitate and host a series of sessions (using video conference) that are inspirational and engaging
- Use the principles of action learning to successful facilitate each session
- Work with participants to develop a collaborative and open culture and supporting behaviours within the Peer Network cohort
- React and respond to the specific issues presented by participants within the sessions
- Focus the session topics on specific issues as directed by the cohort participants (see possible themes and topics provided by BEIS)
- Champion the programme, its benefits and its impact on productivity
- Gather and capture learnings and good/best practice and feedback insight, share best practice, and identify opportunities for improvements and new initiatives
- Work collaboratively with programme colleagues and other facilitators to ensure high quality service provision
- During the course of the programme, identify opportunities where participants could benefit from deeper support by referral into the Growth Hub and at the end of the action learning series the facilitator will hold a one-to-one review with each individual participant to help consolidate their experience into potential next steps.
- Undertake a structured one-to-one ‘review and next steps’ discussion (using video conference) to understand the challenges and opportunities they need to address, and develop a short action plan for follow-on support
- Identify opportunities for further business support and ensure effective signposting, referrals, and connections
- Link clients into further one-to-one support if not already connected (offered by the Peer Networks programme) and/or onto appropriate Growth Hub support, and liaise effectively to support relevant account management activities
- Undertake any necessary handover requirements.

Supporting the programme

- Support relevant stakeholders to promote, engage, and sell the programme and its activities
- Be flexible and responsive to the needs of participants and the programme managers
- Participate in programme-specific training and orientation
- Maintain participant activity records and documents
- Conform with any other relevant contractual requirements, targets, outputs and reporting
- Support in-programme and post-programme review and evaluation activities
- Comply with all aspects of the programme’s Quality Assurance Framework

Key skills and qualifications

Facilitators should have a range of competencies, enabling them to demonstrate their individual credibility to businesses in the network. All will have the following attributes:

- Strong facilitation capabilities and toolset – **in particular, the use of action learning principles**
- Proven facilitation track record built through work performed with small-businesses, entrepreneurs, ambitious business owners and leaders
- Technical skills to run and manage groups virtually using video conference/collaboration tools
- Excellent understanding of the range of business issues associated with growth, productivity, innovation, strategy, people and skills, driving change, resilience, technology adoption
- Good understanding of the specific needs, characteristics and issues faced by SMEs with the local region
- Appreciation of the business/organisational/economic challenges posed by COVID-19

Key characteristics:

Essential

- Optimistic, enthusiastic and self-motivated, with an empathetic approach
- Engaging personal style, energetic personality
- Understanding and appreciation of smaller business – from micros to large SMEs
- Passionate about getting the best out of people, with a genuine interest in supporting others to excel
- Integrity, independence and patience
- Knowledge and application of facilitation methodologies and toolsets – including action learning styles
- Proven track record in high-impact facilitation in the SME space
- Strong interpersonal skills, with a robust but respectful and constructive approach to facilitation
- Able to offer constructive challenge
- Credibility, a strong business acumen, commercial mindset and excellent project management skills
- Able to interact comfortably at owner/MD/CEO/Board level, with great communication, collaboration and storytelling skills
- Flexible approach to solving business problems and the ability to articulate solutions
- High degree of personal ethics, able to understand and reflect LEP/GH/BEIS strategy and values
- Experience of operating in senior leadership positions within an SME or larger organisation
- Ability to rapidly evaluate the needs of participants and suggest appropriate support based on their capacity, ability and motivation
- Practical understanding of the current landscape of publicly funded business support (local and national)
- Strong IT/technical skills, including an understanding of video conference platforms (e.g. Teams/ Zoom/Hangouts), computerised management information systems, diary management, and CRM databases
- Excellent stakeholder management and relationship management abilities.

Desirable

- Experience of developing and leading peer-to-peer groups, peer boards, or peer networks
- Experience setting up, running, and growing an SME business
- Professional experience of managing and delivering business assessment, advice and development
- Ability to structure, analyse and present complex ideas and data, as well as resolve complex problems
- Relevant qualifications and accreditations.

Peer Network One-to-One Support Provider: for the provision of one-to-one support

The Peer Network Programme provides additional one-to-one support for each participant. This can begin at any point after the first Peer Network session is complete. It can utilise highly competent business coaches, mentors or advisors, the local advisor network, or existing local business support programmes. The purpose of this support is to help to implement and manage change, driving the adoption and implementation of additional actions coming out of the session.

When provided within the programme, the role requires the provision of one-to-one follow-on business-focused coaching/mentoring/support to individual participants through a mixture of consultations and signposting.

The role

The main duties of the One-to-One Support Provider include:

- Analysing the specific difficulties posed to the business by the impact of COVID-19 and what actions should be taken by the SME participant to tackle those issues, in conjunction with their learning from the Peer Networks
- Agreeing with the SME participant ways to maximise opportunities within their existing business
- Encouraging the SME participant to express and discuss their ideas, concerns and understanding of the business situation facing them
- Supporting the SME participant in creating both business and personal objectives and goals
- Helping the SME participant to review their progress and set realistic and practical options to realise their goals
- Helping the SME participant to reflect on and learn from things that did not turn out as expected
- Signposting the SME participant to other sources of information, advice or further support when appropriate
- Encouraging the SME participant to take responsibility for their own decisions, plans and actions.

The requirements

One-to-one follow-on coaching/mentoring/advice [depending on local circumstances]

- Work with the participant to understand their strategy, the challenges and opportunities they face, and agree a plan for follow-on advice which will address specific barriers to productivity and growth
- Deliver a series of structured one-to-one sessions (using video conference) to help address the identified challenges and opportunities
- Provide wide-ranging coaching, mentoring, advice and direction tailored to individual participants
- Understand the local business support landscape to ensure effective signposting, referrals, and connections
- Refer clients back into (or onto) appropriate LEP/Growth Hub support and liaise effectively to support their account management activities.

Supporting the programme

- Support relevant stakeholders to promote, engage, and sell the programme and its activities
- Be flexible and responsive to the needs of participants and the programme managers
- Participate in programme-specific training and orientation
- Maintain participant activity records and documents
- Conform with any other relevant contractual requirements, targets, outputs and reporting
- Comply with all aspects of the programme's Quality Assurance Framework
- Support in-programme and post-programme review and evaluation activities.

Key characteristics:

Essential

- Optimistic, enthusiastic and self-motivated, with an empathetic approach
- Engaging personal style, energetic personality
- Understanding and appreciation of smaller business – from micros to large SMEs
- Passionate about getting the best out of people, with a genuine interest in supporting others to excel
- Integrity, independence and patience
- Knowledge and application of coaching/mentoring/consulting methodologies and toolsets
- Proven track record in high-impact coaching/mentoring/consulting, and SME business advice
- Strong interpersonal skills, able to offer constructive challenge
- Strong influencer, significant experience of coaching/mentoring/advising/supporting others through change
- Credibility, a strong business acumen, commercial mindset and excellent project management skills
- Able to interact comfortably at owner/MD/CEO/Board level, with great communication, collaboration and storytelling skills
- Flexible approach to solving business problems and the ability to articulate solutions
- High degree of personal ethics, able to understand and reflect LEP/GH/BEIS strategy and values
- Experience of operating in senior leadership positions within an SME or larger organisation
- Ability to rapidly evaluate the needs of participants and suggest appropriate support based on their capacity, ability and motivation
- Practical understanding of the current landscape of publicly funded business support (local and national)
- Strong IT/technical skills, including an understanding of video conference platforms (e.g. Teams/ Zoom/Hangouts), computerised management information systems, diary management, and CRM databases
- Excellent stakeholder management and relationship management abilities.

Desirable

- Experience setting up, running, and growing an SME business
- Professional experience of managing and delivering business assessment, advice and development
- Ability to structure, analyse and present complex ideas and data, as well as resolve complex problems
- Relevant qualifications and accreditations.

Peer Networks

Annex 2

Department for Business, Energy & Industrial Strategy

Support Materials

Templates

A series of templates have been produced to support the programme. These are in the Template Pack and include:

- Facilitator tool kit “Peer pack” including Action Cards
- Peer Networks Programme – Participant Charter
- Participant Action Learning Session Record [Action Card]
- Facilitator Notes Template
- One-to-One Support Action Plan
- Participant Action Record – Summary of one-to-one support

Common Orientation Assets

Facilitator Onboarding

Facilitator onboarding will be undertaken locally,

As part of the 2020-21 programme, we invited facilitators to a webinar as part of the onboarding process. Recordings of these can be accessed via Livestorm (Video Conferencing Software for Webinars and Online Meetings | Livestorm) Once registered you can access the webinar via the following link https://app.livestorm.co/the-growth-company/facilitator-support-webinars-event-1

ALS best practice webinar assumes they are a great facilitator and focuses on:

- Programme orientation and standardisation
- Action Learning Methodology – refresher only
- Running virtual sessions – key skills
- Representing a LEP or Growth Hub

Marketing Assets

The following marketing assets have been created to support the programme roll out:

1. Peer Networks Brand Guidelines document
2. Common presentation slide deck template and content: internal – with spec/benefits of involvement (draft for adapting)
3. Common presentation slide deck template: external use (draft for adapting)
4. Range of social media graphical assets and copy
5. Overview marketing collateral – 2-page flyer for digital and print use
6. Overview marketing collateral – 8-page flyer for digital and print use
7. Minimum common web content
8. Motion graphic / explainer style video c.60 seconds (not geography specific) client-facing animation

The folder containing the above also includes all assets for each Growth Hub to use to tailor the above elements and develop their own, using the Brand Guidelines.

Action Learning in Practice

Choosing an Action Learning Problem

Selecting the right problem to work on in action learning set can be tricky. An action learning problem should be an issue, concern or opportunity that you want to do something about. Generally, they are diverse problems that are both critical and complex.

Being personally unable to fix a broken laptop is a problem and inconvenient, but there are computer technicians that have the expert knowledge to get it working again. Getting staff to change the way they work is more complex with no right or wrong answer. The latter is more suited to action learning.

When picking a problem, you should be able to answer yes to the following:

1. Is the challenge important, significant, complex and real?
2. Am I certain I will be able to act on the dilemma?
3. Am I willing to be challenged on this area of my work?

Framing the Problem

It is important to define the problem tightly enough to make sure that you have clear, measurable outcomes or success criteria. In his 2008 book *Action Learning for Managers*, Mike Pedler suggests thinking through the problem using the following format.

1. Describe your problem in one sentence:
    a. Why is this important?
    b. To you?
    c. To your company?
2. How will you recognise progress on this problem?
3. Who else would like to see progress on this problem?
4. What difficulties do you anticipate?
5. What are the benefits if this problem is reduced or resolved?
    a. To me?
    b. To other people?
    c. To the organisation?

Presenting a Problem to the Action Learning Set

Participants are typically allocated an amount of time to present their problem. This means that to maximise the effectiveness of their slot, the participant needs to approach it in a structured manner.

It can be helpful to:

- Prepare for sessions in advance
- Structure what you want to say in your allocated time
- Be clear about what you would like the set to focus on
- Give the minimum background context needed for the set to understand the problem
- Explain what you have tried already
- Summarise what you perceive your options to be

Skills a participant will develop as a presenter (Pedler, 2008):

- Taking and holding the focus of the session
- Describing and analysing the problem
- Asking for help, advice, and assistance
- Being able to receive feedback and challenge
- Ability to reflect on what you receive and experience
- Staying in charge of your time, problem, and learning
- Planning next steps
- Resilience and perseverance

Asking Insightful Questions

The ability to ask powerful insightful questions of the presenter is one of the key skills required of members of an action learning set. They should be able to ask effective questions which stimulate the issue holder to think though their issue, consider their options and choose a course of action. Effective questions are usually open questions and are not leading.

When asking questions participants should take care to:

- Ask questions rather than offer solutions
- Show empathy and concern
- Consider how they are helping the presenter to think in different ways about their problem
- Think about their own motives when asking questions
- Consider when it is appropriate to support and when it is appropriate to challenge

The Deeper Questions Grid developed by John Sawyer can help form insightful questions.

	Is/does? Present	**Did?** Past	**Can?** Possibility	**Would?** Probability	**Will?** Prediction	**Might?** Imagination
What? Event						
Where? Place/when		FACTUAL			PREDICTIVE	
When? Choice/time						
Who? Person						
Why? Reason		ANALYTICAL			INSIGHT GENERATION	
How? Meaning						

Further Reading

Action Learning For Change – a practical guide for managers, Lynns Butler, Nigel Leach, Management Books 2000 Ltd ISBN 9781852526900

The Action Learner's Toolkit, John Edmonstone, Gower ISBN: 978-0566084669

Optimizing the Power of Action Learning (published 2004), Michael J. Marquardt, Davies-Black Publishing ISBN 0-89106-191-6

Action Learning: A practitioner's guide, Ian McGill & Liz Beaty, RoutledgeFalmer ISBN 0-749434538

The Action Learning Handbook (published 2004), Ian McGill & Anne Brockbank, RoutledgeFalmer ISBN 0-415-335-116

Facilitating Action Learning: A Practitioners Guide, Mike Pedler & Christine Abbott, Open University Press ISBN 0-35-524597-8

Action Learning for Managers, Mike Pedler, Lemos & Crane ISBN 1-898001-28-6

The ABC of Action Learning (second edition), Reg Revans, Lemos & Crane ISBN 9781409427032

Action Learning: A practical Guide (second edition), Krystyna Weinstein, Gower ISBN 0-566-080970-4

Action Learning: Research and Practice journal

Publisher: Routledge, Part of the Taylor and Francis Group, ISSN 1476-7333
www.tandfonline.com/toc/calr20/current

Action Learning: Research and Practice is released three times a year and publishes articles which advance knowledge and assist the development of practice through the processes of action learning. It states that articles should aim to create theory, grounded in empirical observation of data and experience, that widens understanding of action learning and research in professional and organisational settings

Additional Sources of Information

The International Foundation for Action Learning (IFAL)

IFAL Administration Office
4 Spinners Court
Skipton
North Yorkshire
BD23 2UT
UK
www.ifal.org.uk

IFAL was first established 1977 as the 'Action Learning Trust'. Its purpose was "*To advance the education of the public with particular reference to education by Action Learning*".

In 1984 the Action Learning Trust became The International Foundation for Action Learning and is a registered charity in the UK. IFAL encourages the use of action learning through meetings, conferences and workshops, virtual events and its action learning network. Membership is open to individuals and organisations.