



# Clinical Research Delivery Community

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## Strategic Plan

2026–2029

*Offering patients opportunity,  
Strengthening our research community*

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## ACRONYMS

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ACCORD	Academic & Clinical Central Office for Research & Development
AI	Artificial Intelligence
CI	Chief Investigator
CPD	Continuous Professional Development
CRF	Clinical Research Facility
CRNM	Clinical Research Nurse Manager
eESS	Electronic Employee Support System
GCP	Good Clinical Practice
HR	Human Resources
IMP	Investigational Medicinal Product
MDT	Multi-Disciplinary Team
NHSL	NHS Lothian
NRS	National Research Scotland
OH	Occupational Health
PDP	Professional Development Plan
PI	Principal Investigator
PPI	Patient Public Involvement
R&D	Research & Development
RCN	Royal College of Nursing
SMT	Senior Management Team
SOP	Standard Operating Practice
SSTS	Scottish Standard Time System
VPAG	Voluntary scheme for branded medicines Pricing, Access and Growth
WfH	Work from Home
WTCRF	Wellcome Trust Clinical Research Facility

# EXECUTIVE SUMMARY

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The NHS Lothian Clinical Research Delivery Community Strategic Plan (2026–2029) sets out how we will work together to deliver safe, efficient, and meaningful research that improves care for patients and communities. This plan is about our people, our purpose, and how we create the best environment for research to thrive.

Our work over the next three years will focus on six key areas, discussed throughout this strategic plan as **Strategic Themes**.



People & Culture

## People & Culture

We will build a workplace where everyone feels valued, supported, and proud of what they do and where they work. To help our community grow and succeed together we will invest in our people, by supporting opportunities, leadership, and wellbeing.



Operational Research

## Operational Research Management

We will make it easier for teams to deliver great research by improving our systems and processes. Clearer ways of working and better tools will help us be more consistent, efficient, and transparent.



Organisational Governance

## Organisational Governance

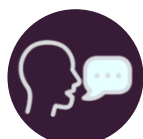
We will make sure everything we do meets NHS Lothian's high standards for safety, ethics, and quality. Everyone will understand their responsibilities and be supported to do things the right way, every time.



Learning & Development

## Learning & Development

We will support everyone to learn and develop throughout their career. From new starters to experienced staff, we will offer training, mentoring, and time to focus on personal growth.



Communication

## Communication

We will keep people connected and informed. Regular updates, team forums, and an online hub will help us share news, celebrate success, and make sure everyone's voice is heard.



Research Governance

## Research Governance

We will strengthen how we manage and support research across NHS Lothian. By working closely with partners and involving patients and the public, we will deliver research that truly makes a difference.

Together, these priorities will help us build a confident, connected, and compassionate research community — one that delivers excellent research, supports its people, and improves outcomes for everyone we serve.

# 1 INTRODUCTION

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This Strategic Plan has been developed with and for the clinical research delivery community, drawing on engagement with staff, managers, and stakeholders across NHS Lothian. It aligns with both local and national research priorities and is underpinned by our shared vision and purpose:

- **Vision:** To be a leading, collaborative, and high-performing research delivery community that advances clinical research excellence across NHS Lothian.
- **Purpose:** To provide the people, systems, and governance needed to deliver safe, efficient, and impactful research that improves care and outcomes for patients.

This NHS Lothian clinical research delivery community Strategic Plan sets out a clear strategic direction for the research delivery teams for 2026–2029. This plan outlines our vision and six strategic themes which will guide our efforts to strengthen research delivery, enhance workforce capability, and embed a culture of collaboration and innovation across NHS Lothian. It defines the key actions necessary to build the foundations that will support and empower our research workforce to shape a sustainable, high-performing future, delivering safe, efficient, and impactful research that improves care and outcomes for patients.

This strategic plan has been developed through an open, transparent, and inclusive process. All staff working within the clinical research delivery teams across NHS Lothian and the University of Edinburgh were given the opportunity to contribute via a staff survey, and a representative group was invited to participate in the Strategic Plan Working Group.

This plan is not intended to replace existing strategies used by specific research specialties, such as those from the Clinical Research Facility (CRF) or the University of Edinburgh (UoE). The NHS Lothian R&D Strategic Plan or the National Research Scotland (NRS) Networks, or any individual team’s plans, but to sit alongside them. It serves as a reference point for all staff and teams, providing guidance for team planning and supporting professional development. It is also designed to act as a communication tool between research staff and ACCORD.

## *Offering patients opportunity, Strengthening our research community*

The landscape of healthcare and clinical research has evolved significantly in recent years. The lessons learned from the COVID-19 pandemic, the acceleration of digital innovation, and the increasing complexity of care have reshaped our priorities and opportunities. In this context, the clinical research delivery teams’ role has never been more critical. By recognising the expertise, adaptability, and resilience demonstrated across our research community, this plan seeks to build on that experience, investing in our people, strengthening our systems, and enhancing our partnerships to enable research that makes a real difference.

Delivering high-quality research requires strong interdependencies across disciplines, services, and partner organisations. This plan therefore emphasises the importance of compassionate and collaborative leadership, shared accountability, and a culture that values

curiosity, learning, and continuous improvement. It seeks to empower our staff to lead from every level, whether at the front line of clinical trials or in strategic management.

The ambitions outlined in this plan reflect our collective commitment to ensuring a sustainable and skilled research workforce, with clear pathways for professional growth and development. Through partnership with NHS Lothian's Research & Development Office, higher and further education institutions, and external collaborators, we will continue to expand opportunities for education, training, and innovation across all areas of clinical research delivery.

## 2 STAFF SURVEY

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A survey of clinical research staff across NHS Lothian was conducted to understand their experiences of delivering research and working within research teams. Staff emphasised the need for a strategic plan that is accessible, concise, inclusive, and meaningful across diverse roles, responsibilities, and specialties. Despite differences in posts and settings, respondents shared consistent concerns, expectations, and values. These aligned into two overarching categories: Research-Related Objectives and Staff-Related Objectives

### Research-Related Objectives

#### 1) Improving Research Delivery Through Communication and Process Change

Staff stressed the need for a strategic plan that strengthens research delivery by:

- Improving operational efficiency and reducing time pressures
- Addressing participant recruitment and retention challenges
- Increasing trial activity, including commercial research opportunities
- Enhancing team-based financial management
- Strengthening collaboration between finance, R&D, and clinical services
- Reducing inconsistent or duplicative processes through clearer, standardised systems, particularly within finance and R&D

#### 2) Integrating Research into Clinical Care

Staff expressed a shared vision of research as an integral, visible element of clinical care, helping to reduce inequalities in access to trials. Greater integration was viewed as beneficial:

- **For patients** - improved quality of care and access to research opportunities
- **For staff** - increased job satisfaction and identity within clinical research roles
- **For NHS Lothian** - improved capability to meet service demand where appropriate

#### 3) Working Environments

A consistent theme was needed for reliable access to appropriate workspace and support for working across multiple clinical sites.

## Staff-Related Objectives

### 1) For Individuals

Staff identified several factors critical to wellbeing and role satisfaction:

- Joy at work, meaningful contribution, and social connection
- Manageable workload, with clear expectations, defined responsibilities, and sensible, quality-focused goals
- Greater job security, with concerns raised about reliance on fixed-term contracts and interest expressed in exploring permanent positions
- Clear role distinctions to ensure band-appropriate duties
- Transparent, structured career pathways, including new roles to support progression across all bands
- Regular, structured meetings to reflect on work quality, identify training needs, develop specialisms, discuss career progression, and recognise individual contributions

### 2) For Teams

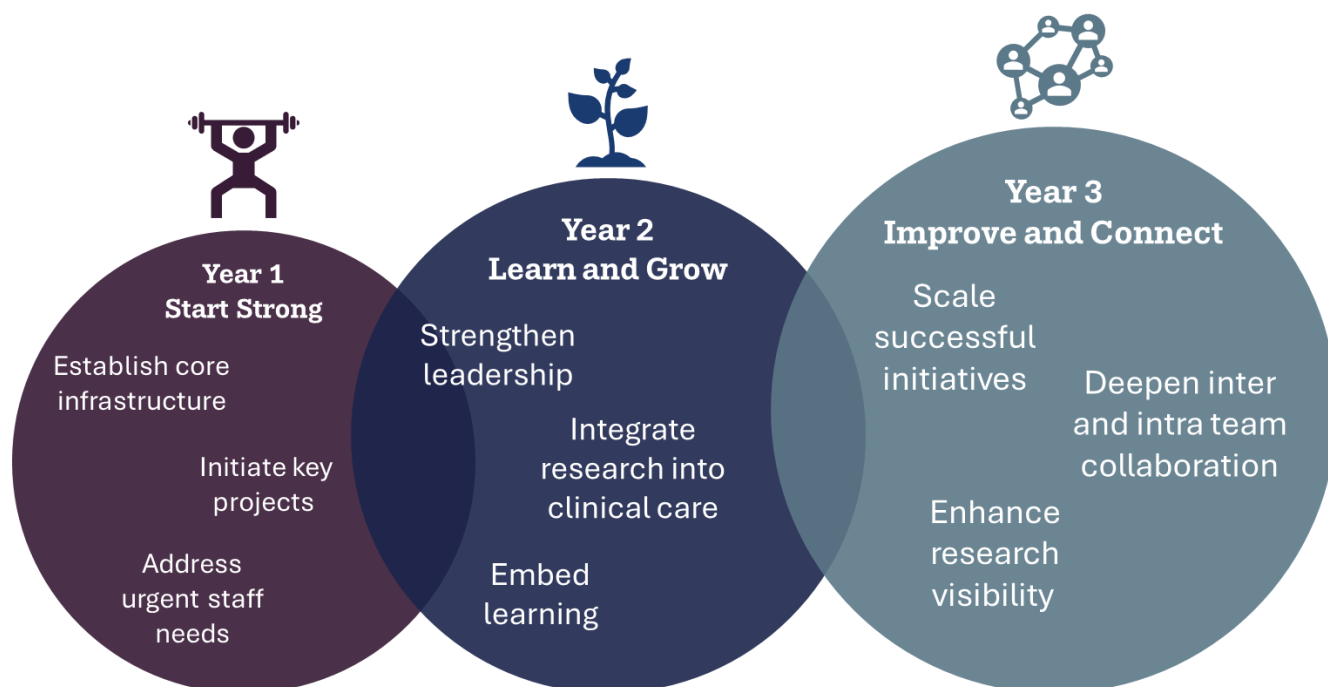
Teams highlighted:

- The importance of staff feeling valued, supported, empowered, and fulfilled as key drivers of engagement and retention
- A sense that NHS Lothian does not consistently recognise, promote, or utilise the contribution of research teams
- Frustration that suggestions for service improvement are not always acted upon, contributing to feelings of being undervalued
- A desire for enhanced development opportunities, including external training/conferences and stronger internal team-to-team learning
- The need for development at both individual and team levels—supporting personal specialisms while building collective capability
- The importance of improved collaboration and communication across sites, specialties, and departments to build community, mutual support, and inclusion
- The value of formalised spaces to share successes, skills, resources, problem-solving approaches, and insights across teams, ensuring accessibility for all—including lone researchers

### 3 SUMMARY OF IMPLEMENTATION PLAN

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Our plan is to be executed over three years with the following aims:



### 4 THE CLINICAL RESEARCH DELIVERY TEAM WORKFORCE

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Currently, NHSL hosts 40 Clinical Research Delivery Teams, including those managed by both clinical services and the University of Edinburgh. All teams actively invite eligible NHS Lothian patients to participate in a wide variety of clinical trials.

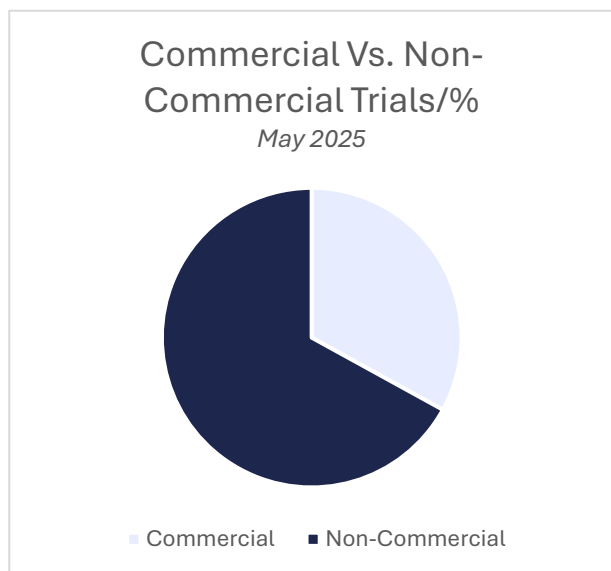
Approximately 33% of these trials are commercial and 67% are non-commercial, representing a diverse research portfolio. Each team and specialty have their own distinct characters. Some trials are highly complex, while others are more straightforward. This variety reflects NHS Lothian's strength in offering a rich and innovative research environment that directly contributes to improving patient care and outcomes.

Our Clinical Research Delivery workforce is made up of:

- 68% Registered Nurses and Midwives, and
- 32% Other skilled research staff, including Research Managers, Data Managers, Project Managers, Research Practitioners, Clinical Trial Assistants, and Administrative Assistants.

A 2026 Clinical Research Delivery Staff Census will provide more detailed insights into how our teams are evolving, growing, and developing new capabilities to meet future research demands.

*Note: This data does not include our wider support colleagues such as those in the Research Office (ACCORD), Pharmacy, Laboratories, Radiology, Medical Physics, and Medical Photography, all of whom play a vital role in enabling the successful delivery of clinical trials across NHS Lothian.*



## 5 EQUALITY AND INCLUSION IN CLINICAL RESEARCH DELIVERY

We are committed to advancing equality, diversity, and inclusion across all clinical research delivery teams within NHS Lothian. Our goal is to ensure that every individual, regardless of background, has equitable access to opportunities, support, and career progression. By actively seeking to understand and address the barriers that prevent inclusion and advancement, we aim to create an environment where every member of the research workforce feels valued, respected, and empowered to thrive. This commitment is firmly aligned with NHS Lothian’s Equality and Human Rights Strategy.

Our clinical research delivery workforce plays a vital role in enabling research that improves patient outcomes and drives innovation. We want to ensure that this community reflects the diversity of the populations we serve and that access to research careers is open, inclusive, and supported at every level. In doing so, we will contribute to offering meaningful employment, training, and development pathways that support local communities across Edinburgh and the Lothians.

We are also committed to widening participation in research careers, building clear entry routes for those with limited experience and supporting progression through structured development opportunities. This includes strengthening pathways for Research Support Workers, Project Managers and other support services while promoting research as a fulfilling and accessible career choice. Our collaboration with education and training partners will be key to realising this ambition, ensuring that everyone, regardless of role or background, can grow and contribute.

Leadership is both a role and a shared responsibility across our teams, and we recognise that effective leadership cannot be separated from inclusion. Our aim is to develop both compassionate, inclusive leaders and a culture of compassionate, inclusive leadership that everyone can contribute to.

Through access to professional development, mentorship, and leadership programmes, we will foster a collaborative and respectful environment where all staff feel empowered to lead in ways that align with our shared purpose. By strengthening leadership at every level, we will build cohesive teams that harness the diversity of our workforce to enhance research delivery, drive innovation, and increase impact across NHS Lothian.

## 6 STRATEGY MAP

This strategic plan has been shaped and guided by the priorities set out in the [Reimagining Nursing and Midwifery in NHS Lothian Strategic Plan \(2023–2028\)](#) and the [NHS Lothian Research and Development Research Strategy Overview \(2022–2027\)](#).



## 7 OUR AMBITIONS AND STRATEGIC THEMES

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People & Culture



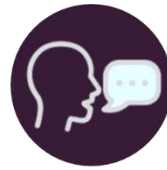
Operational  
Research  
Management



Organisational  
Governance



Learning &  
Development



Communication



Research  
Governance

**Note:** The Measures of Success outlined below are provided as examples for teams. Individual clinical research delivery teams should adapt, expand, or refine these measures based on their own priorities, service needs, and local context.

### 7.1 PEOPLE & CULTURE

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**Aim:** We aim to foster a supportive, inclusive, and high-performing culture where every individual feels valued and empowered. Investment in leadership, fair access to training, improved communication, and recognition of success will help create a stable, engaged, and motivated workforce.


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Our people are at the heart of clinical research delivery. The success of our strategy depends on building a supportive, inclusive, and high-performing culture where every individual feels valued, recognised, and inspired to contribute to excellence in research. We are committed to creating an environment where colleagues can thrive, take pride in their work, and see a clear future for themselves within NHS Lothian.

To build a strong, supported, and empowered workforce, we will:

- Strengthen leadership at all levels
- Develop compassionate and inclusive management practices
- Ensure equitable access to opportunities for professional and personal growth
- Provide clear pathways for career progression
- Maintain fair and transparent recruitment practices
- Celebrate and value the diversity that strengthens our workforce

Staff will be equipped with the tools, technology, and resources they need to deliver their roles effectively, with improved communication systems and responsive employee relations to support collaboration and wellbeing. We will continue to promote flexibility, belonging, and recognition across teams, creating a workplace where everyone feels supported to do their best work and where contributions are actively valued and visible.



A key priority will be enhancing workforce stability and resilience through increased access to permanent contracts and development opportunities. We will encourage open dialogue through regular feedback and two-way communication between staff and managers, ensuring that every voice is heard and acted upon. Success and innovation will be recognised and celebrated at every level, reinforcing a culture of pride, teamwork, and shared achievement.

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### **Key Deliverables**

- Increased access to permanent contracts to strengthen workforce stability
  - Regular, structured feedback and open conversations between staff and managers
  - Recognition of achievements and celebration of success across teams
  - Enhanced leadership and wellbeing support, aligned with NHS Scotland’s “Once for Scotland” initiative
- 

### **Measures of Success**

Improved staff engagement, positive iMatters results, strong evidence of career progression, and demonstrable improvements in wellbeing, inclusion, and staff retention, showing that the NHS Lothian Clinical Research Community is a great place to work, develop, and lead.

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## 7.2 OPERATIONAL RESEARCH MANAGEMENT

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**Aim:** We will deliver operational excellence by streamlining systems, strengthening financial management, and embedding consistent processes across all research teams. A robust, transparent, and collaborative operational framework will ensure that research is delivered efficiently and to the highest standards.

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We will support and encourage the use of EDGE across the organisation, supported by comprehensive training to ensure data consistency and accurate financial oversight. A centralised e-Toolbox will provide staff with accessible templates, guides, and process documentation, promoting consistency and confidence in day-to-day research operations.

Partnership working with finance, contracting, and commercial teams will be enhanced, enabling accurate forecasting, transparent reporting, and increased support for commercial trials. This will contribute to sustained growth, improved accountability, and more effective use of resources.

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### **Key Deliverables**

- Standardisation of systems and processes across all teams
  - Comprehensive training in EDGE, finance, and contracts
  - Development of a centralised e-Toolbox for operational resources
  - Expansion of commercial trial activity and collaborative structures
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### **Measures of Success**

Improved efficiency, accurate income reporting, increased commercial research activity, and stronger alignment between operational teams and strategic goals.

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## 7.3 ORGANISATIONAL GOVERNANCE

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**Aim:** We will uphold a culture of integrity, accountability, and compliance, ensuring that all research delivery meets NHS Lothian's governance standards and ethical obligations. Governance will not be seen as a compliance exercise but as a shared commitment to quality, safety, and transparency.

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Managers and staff will have access to targeted training on governance, appraisals, reviews, and health and safety, enabling them to embed good practice in daily operations. We will maintain full compliance with Standard Operating Procedures (SOPs) and mandatory training through Turas Learn, ensuring that governance becomes part of the team's everyday culture.

Regular participation in iMatters and local feedback mechanisms will enable continuous improvement and organisational learning, while internal audits will provide assurance and accountability.

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### **Key Deliverables**

- 100% completion of mandatory training across all staff
  - Strengthened governance and audit processes across teams
  - Improved understanding and application of SOPs
  - Regular review and monitoring through feedback and audit cycles
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### **Measures of Success**

Consistent compliance rates, strong audit outcomes, and clear evidence of governance embedded in all aspects of research delivery.

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## 7.4 LEARNING & DEVELOPMENT

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**Aim:** We are committed to fostering a learning culture that promotes lifelong growth, capability, and innovation. Every staff member will have the opportunity to develop personally and professionally, ensuring that our workforce remains skilled, adaptable, and ready to meet future research challenges.

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A comprehensive Learning & Development Toolkit will be introduced to support structured progression and capability-building across all roles. Mentoring, coaching, and peer learning opportunities will be expanded, and every staff member will maintain an active Personal Development Plan (PDP).

Structured induction programmes for new staff and students will ensure a consistent and supportive start, while regular one-to-one conversations will focus on goals, wellbeing, and development. These initiatives will help us build confident, capable teams who take ownership of their growth and contribute fully to our shared success.

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### **Key Deliverables**

- Launch of a Learning & Development Toolkit to guide professional growth
  - Expansion of mentoring and coaching opportunities across teams
  - Structured induction for new staff and students
  - Regular one-to-one meetings focused on development and goal setting
- 

### **Measures of Success**

100% PDP completion, improved confidence in staff development surveys, and demonstrable progression within the NHS Lothian Clinical Research Community.

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## 7.5 COMMUNICATION

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**Aim:** Effective communication is essential for connection, collaboration, and impact. We will build a transparent, inclusive, and dynamic communication culture that strengthens relationships within the clinical service teams and across the NHS Lothian Clinical Research Community.

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Regular Research Forums, newsletters, and updates will provide space for dialogue, feedback, and shared learning. A central SharePoint hub will ensure staff have easy access to key information, resources, and updates. Digital tools, including AI solutions such as Copilot, will be explored to enhance communication efficiency and reduce administrative burden.

Externally, we will showcase our achievements through a dedicated Clinical Research Community web page and professional use of platforms such as LinkedIn and BlueSky, highlighting our research impact and celebrating the contributions of our teams.

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### **Key Deliverables**

- Quarterly Research Forums to share learning and connect teams
  - Launch of a Clinical Research Delivery web page to showcase achievements
  - Expansion of social media presence to promote research impact
  - Centralisation of communication tools and resources on SharePoint
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### **Measures of Success**

Improved staff engagement, increased visibility of team achievements, and positive feedback on communication effectiveness across all platforms.

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## 7.6 RESEARCH GOVERNANCE

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**Aim:** We will strengthen research governance through shared accountability, transparent risk management, and continuous improvement. Governance will be embedded across all research activities, ensuring that studies are delivered safely, efficiently, and in full compliance with NHS Lothian and national standards.

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Regular drop-in sessions will provide accessible support for teams on finance, contracts, EDGE, and governance processes, while a shared Risk Register will enhance oversight and consistency. Collaboration between R&D and delivery teams will be deepened to ensure that governance is proactive, coordinated, and focused on improvement.

We will also expand support for Patient and Public Involvement (PPI) to strengthen the relevance and quality of research. By engaging patients, carers, and communities as active partners, we will ensure that our research remains meaningful, inclusive, and impactful.

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### **Key Deliverables**

- Regular governance and finance support sessions for all teams
  - Shared Risk Register to monitor and manage key issues
  - Improved tracking of study feasibility and approval timelines
  - Enhanced support and visibility for Patient and Public Involvement (PPI)
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### **Measures of Success**

Improved audit outcomes, transparent risk management, timely study approvals, and strong engagement with PPI and governance processes.

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Together, these themes create a framework that empowers people, strengthens systems, and fosters collaboration—ensuring the Clinical Delivery Team continues to deliver safe, efficient, and innovative research that improves outcomes for patients.

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# Clinical Research Delivery Community

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**IMPLEMENTATION & ACTION PLAN**

*Delivery of Strategic Plan Objectives*

## 8 IMPLEMENTATION & ACTION PLAN 2026 - 2029

\*Responsible person/group is subject to change

### 8.1 PEOPLE & CULTURE



**THEME: People & Culture** – Compassionate leadership is core to NHS Lothian. This strategic plan ensures research staff and teams are fairly represented, respected, and supported with equal opportunities, clear guidance, and effective supervision.

**NHS Lothian values:** This section embodies *Care and Compassion, Dignity and Respect, Responsibility* and *Teamwork* by ensuring staff are supported, represented and empowered to grow professionally within a compassionate leadership culture.

Objective(s)	Action Points	Priority (Year)	Responsible person/group*
1 Maintain a patient-centred approach	<ul style="list-style-type: none"> <li>Give opportunity to patients to participate in clinical trials and studies for reasons of altruism, self-benefit and benefit of future generations</li> <li>Ensure trials and studies are enthusiastically taken on by research teams across NHSL, giving patients a broad selection of specialty-specific research opportunities</li> <li>Work collaboratively to ensure our research systems and processes reflect an efficient, experienced and knowledgeable approach to give patients and families confidence</li> <li>Consider how patient experience is evaluated, such as a feedback strategy e.g. Care Opinion</li> </ul>	1-3	All
2 Work towards permanent contracts for all research staff who have been in a fixed term post for more than 2 years	<ul style="list-style-type: none"> <li>Escalate the issue of fixed term contracts through partnership representation to the Director of People &amp; Culture and the Executive Nurse Director</li> <li>Support the process of moving all staff who have exceeded a 2-year fixed term contract into permanent contracts when approved to do so</li> </ul>	1	Clinical Research Nurse Managers (CRNM)

3	To ensure staff have equal opportunity to apply for funding to attend courses, conferences and meetings	<ul style="list-style-type: none"> <li>• Provide access to the Professional Development Fund</li> <li>• Provide guidance, support and advice on applying for funding from PI funds, Endowment funds, NHSL Charity, Professional development fund, RCN and other options</li> <li>• Ensure staff are aware of the NHSL Study leave policy</li> <li>• Develop clinical research opportunities in the NHS Lothian Experiential Learning and Leadership Academy</li> <li>• Map educational and development opportunities for staff to promote awareness</li> </ul>	1-2	Line Manager/ Research Team Lead/ CRNM
4	To ensure staff and teams can discuss their concerns, issues and successes in a safe and trustful environment and forum	<ul style="list-style-type: none"> <li>• Ensure line managers make time and space to discuss staff concerns and issues in regular meetings</li> <li>• Foster a culture where staff learn from each other and share support within the community</li> <li>• Ensure staff and teams know the appropriate pathway should they need to escalate their concerns through the line management and organisational structure - <u>Speak Up</u></li> </ul>	1	Line Manager/ Research Team Lead/ CRNM
5	To ensure all clinical research delivery staff have the correct equipment to enable timely and meaningful engagement with the research community (e.g. headsets, webcams, second monitor)	<ul style="list-style-type: none"> <li>• Provide individual headsets and webcams for all staff to ensure they can attend online meetings, trainings and presentations required by their job description</li> <li>• Provide a second monitor to enable staff with data collection and data entry responsibilities, and especially for all staff using EDGE or undertaking activities where multiple documents/screens are required and support to implement the use of these</li> <li>• Seek funding from either PI funds, Endowments, NHSL Charity or other funding streams</li> <li>• Seek line management support to achieve this objective</li> </ul>	1	Line Manager/ Research Team Lead/ CRNM
6	To ensure Senior staff have support with issues such as Attendance Management, recruitment, Flexible Working policy, OH services, HR systems and processes provided on the NHSL intranet	<ul style="list-style-type: none"> <li>• Provide opportunity and access to training sessions on aspects of HR management that are in demand such as Attendance Management, eESS, Health Roster, SSTS and Loop</li> <li>• Utilise intranet resources</li> <li>• Encourage all line managers to join the Lothian Line Manager Network on Teams</li> </ul>	1-2	Line Manager

7	To ensure staff have professional development opportunities within NHSL	<ul style="list-style-type: none"> <li>• Encourage and assist staff in seeking career advancement opportunities</li> <li>• Support Band 5 staff with the opportunity to re-evaluate their positions as per NHSL policy</li> <li>• Support all staff to review their roles through the job evaluation process if appropriate</li> <li>• Work with the Transforming Roles working group to develop new roles in the clinical research community to increase opportunities for all staff e.g. broader range of non-registered roles, advanced nursing roles</li> <li>• Promote Clinical Research Practitioner registration for these eligible - <a href="#">Clinical Research Practitioners - The Academy For Healthcare Science</a></li> </ul>	2-3	<b>Line Manager/ Research Team Lead/ CRNM</b>
8	To ensure teams have a suitable office environment and storage space to enable them to work effectively and efficiently	<ul style="list-style-type: none"> <li>• Consider ways to improve office/storage space include: <ul style="list-style-type: none"> <li>– Timely archiving of trials once closed</li> <li>– Declutter, advertise equipment no longer used but still in good working order</li> <li>– Return equipment to medical physics if no longer used/in working order</li> <li>– Hot desking to utilise the library or other available, appropriate spaces</li> <li>– Use of air-cooling/desk fans and SAD lamps to improve environment</li> </ul> </li> <li>• Seek Manual Handling team assessment of the office</li> <li>• Seek Health &amp; Safety team assessment of the office</li> <li>• Escalate the office constraints to R&amp;D Senior Management Team (SMT) for inclusion in future planning opportunities</li> </ul>	3	<b>Research Team Lead/ CRNM</b>

## 8.2 OPERATIONAL RESEARCH MANAGEMENT



**THEME: Operational Research Management** – Effective research management provides the tools, templates, and expertise to lead, monitor, and support research teams. Evolving metrics and analytics offer insight into team performance, guiding strategic planning that benefits patients, research outcomes, and team organisation and development.

**NHS Lothian values:** This section reflects *Quality* and *Responsibility* through systematic research governance, and *Teamwork* by ensuring shared accountability and efficiency across all research areas.

Objective(s)	Action Points	Priority (Year)	Responsible person/group*
1 To provide training on Research Finance & Contracts	<ul style="list-style-type: none"> <li>• Advertise Research Finances &amp; Contracts training on the CRF education website</li> <li>• Offer bespoke training to teams, staff and CI/PIs</li> <li>• Provide Research Finances &amp; Contracts reference guide</li> <li>• Train trainers to assist with ongoing education</li> </ul> Seek technical guidance and support for these trainings from R&D contracts, governance and finance teams	<b>1</b>	<b>CRNM</b>
2 To provide access to EDGE to all clinical research teams across NHSL to enhance trial and participant management, automated recruitment reporting and income recovery and invoicing	<ul style="list-style-type: none"> <li>• Ensure the EDGE Working group is inclusive and has representation from across the research community. This group will provide support when required for anyone who wishes to use EDGE</li> <li>• Provide EDGE 'Live' training sessions</li> </ul> Establish and consolidate EDGE drop-in sessions for all (quarterly)	<b>1</b>	<b>EDGE Working Group</b>
3 To encourage individual team's senior staff and those with finance responsibility to meet monthly/quarterly with their management accountant	<ul style="list-style-type: none"> <li>• Develop a management tool (Excel) to help structure the management of team research finances</li> <li>• Share finance spreadsheet – with Finance team, CRNMs</li> <li>• Organise regular face-to-face and/or online finance meetings</li> </ul>	<b>1</b>	<b>Finance Responsible Staff</b>

		<ul style="list-style-type: none"> <li>The finance team will establish a <i>control procedure</i> to track meetings with the clinical research team delivery team staff (lead or finance responsible)</li> </ul>		
4	Integrate clinical research into clinical care	<ul style="list-style-type: none"> <li>Develop or continue to develop relationships with the clinical teams to be aware of and support clinical research within their specialty and consider strengthening relationships with clinical triumvirate (if appropriate)</li> <li>Train clinicians to identify key eligibility criteria to help the identification of potential trial participants</li> <li>Attend MDT meetings to be visible and to present active trials</li> <li>Use Impact posters to promote trial successes, consider PPI involvement to develop these</li> <li>Consider ways to engage clinical staff that are not burdensome Consider research champions in the clinical setting, offering CPD opportunities to clinical staff (e.g. Good Clinical Practice training and National Institute of Health Research Associate Principal Investigator scheme) and consider secondment opportunities</li> </ul>	1-3	All
5	To ensure staff understand activity regarding to mandated recruit uploads including monthly recruitment reporting (for the purpose of the Chief Scientist Office), targets and timelines for commercial and non-commercial activity	<ul style="list-style-type: none"> <li>Provide templates to assist the recording of monthly and if appropriate annual recruitment metrics (see Research Management eToolbox)</li> <li>Provide advice on creating graphs to visually demonstrate activity</li> <li>Incorporate planning and tracking tools to assist trial organisation Explain the implications and benefits of commercial and non-commercial recruitment</li> </ul>	1-3	All
6	To establish a Research Management eToolbox	<ul style="list-style-type: none"> <li>List useful tools, templates and documents used across the NHSL research community with signposting to a saved location</li> <li>Add tools, templates and documents in generic format and upload to SharePoint/intranet in the centralised Research Management eToolbox</li> <li>Tools and templates should be adapted from a generic form to each team's specific context and need to ensure relevance and representation Allocate a named person responsible to keep these resources up to date</li> </ul>	2-3	All
7	To ensure processes to collaborate with other research teams is clear and efficient e.g. teams with CRF and CRF with teams	<ul style="list-style-type: none"> <li>Request guidance from the Wellcome Trust Clinical Research Facility (WTCRF) on applying for support</li> <li>Clarify the expectations that the CRF has of other research staff</li> <li>Develop a liaison nurse/team to communicate between teams/CRF</li> </ul>	2	All/CRF

		Ascertain what services the CRF offers, the pricing and how to request assistance		
8	Engage and collaborate effectively with support services such as Pharmacy, Labs, Radiology, Medical Physics and Medical Photography	<ul style="list-style-type: none"> <li>Identify current practises for trial participants as inpatients and outpatients, for IMPs and standard medications in collaboration with Clinical Trials Pharmacists</li> <li>Identify current processes involved in the approval and use of equipment and machinery in clinical trials with Medical Physics</li> </ul>	2-3	CRNM
9a	To support & engage with VPAG to achieve a 25% increase in commercial activity across NHSL over 3 years	<ul style="list-style-type: none"> <li>Identify barriers and constraints that stop teams currently doing more commercial trial activity</li> <li>Work with the VPAG/commercial team to identify solutions to these problems</li> <li>Work collaboratively to consider the opportunities for increased commercial trial activity</li> <li>Monitor activity to ascertain percentage increase in commercial activity over the coming 3-year duration, establish metrics of relevance (recruitment, income, no. Trials)</li> <li>Expand Finance-led talks to highlight the value and impact of commercial activities</li> <li>Broaden R&amp;D sessions to review collective progress and define priority areas</li> </ul> <p>To strengthen NHSL's position as a trusted site for commercial trials by ensuring consistent effectiveness and professionalism</p>	3	All
9b	To build relationships with Industry through professionalism, achieving set targets and timelines and being reliable			
10	To explore how research teams of different sizes can be structured to make best use of staff skills and collaboration, ensuring NHSL can meet a range of clinical and research demands effectively.	<ul style="list-style-type: none"> <li>Map and review the size and structure of teams across the clinical research delivery community</li> <li>Maintain the biennial census of research staff to monitor workforce trends</li> <li>Collect metrics such number of ongoing commercial/non-commercial trials</li> <li>Undertake a qualitative staff survey of 'what makes an effective and sustainable team'</li> <li>Use vacancies as an opportunity to review team needs and optimise roles for improved performance and alignment with strategic goals</li> </ul> <p>Refresh of the Transforming Roles working group</p>	3	CRNM

## 8.3 ORGANISATIONAL GOVERNANCE



**THEME: Organisational Governance** – Supporting research delivery through alignment with NHS governance structures, policies, and assurance processes.

**NHS Lothian values:** This section aligns with *Openness and Honesty* by embedding integrity and visibility within governance systems, while ensuring staff are supported to act with *Responsibility* in their roles.

	Objective(s)	Action Points	Priority (Year)	Responsible person/group*
1	To ensure staff are aware of organisational objectives and priorities, including the NHSL R&D Strategic Plan	<ul style="list-style-type: none"> <li>• Make strategies and organisational documents accessible to all</li> <li>• Reference organisational documents within the construct of clinical research</li> <li>• Provide links to all relevant strategies in induction programmes</li> </ul>	1	All
2	To ensure staff adhere to NHSL Values and maintain respect for one another, their personal and professional behaviours and a collegial approach to others	<ul style="list-style-type: none"> <li>• Hold one another to account for our behaviours and offer pathways for expressing concerns within and outwith team structures, optimising the research community for support</li> <li>• We will adhere to the NHSL Values</li> <li>• Staff will function according to their professional regulatory bodies where applicable</li> <li>• We will link to policies in the Induction pack, e.g. uniform policy, attendance, flexible working etc <a href="https://workforce.nhs.scot/policies/">https://workforce.nhs.scot/policies/</a></li> </ul>	1	All
3	To ensure all staff have Turas Learn accounts and adhere to mandatory training requirements	<ul style="list-style-type: none"> <li>• Line managers to utilise the review system to ensure accounts are current and that staff are allocated the appropriate modules</li> <li>• Include a list of mandatory and essential modules in team induction pack</li> <li>• Ensure staff have time to complete mandatory training</li> </ul>	1	All
4	To ensure staff and line managers are trained, confident and supported to do staff performance reviews/appraisals	<ul style="list-style-type: none"> <li>• Provide training for line managers responsible for professional development planning</li> <li>• Ensure access to Turas Appraisal</li> </ul>	2	Line Manager

	[Continued].	<ul style="list-style-type: none"> <li>• Provide paperwork alternative to prepare for a Professional Development Planning (PDP) meeting</li> <li>• Set up annual meeting to discuss appraisal/Professional Development Planning and aim for 100% compliance</li> <li>• Set up appraisal reviews at intervals determined by the needs of each team member</li> </ul>		
5	To ensure all teams engage with the annual iMatters or equivalent exercise	<ul style="list-style-type: none"> <li>• Work towards making the information obtained from these exercises meaningful and valuable for all team members by utilising Band 7 meetings and including it as a standing agenda item and adding highlighting it at Band 7/8 bi-annual meetings</li> <li>• Consider team building events and resources for cost free ideas</li> </ul>	2	Line Manager
6	To ensure all staff and team leads are trained in how to complete Health & Safety requirements & assessments	<ul style="list-style-type: none"> <li>• Utilise intranet resources</li> <li>• Encourage staff to join the NHSL leadership Teams channel which highlights resources</li> <li>• Utilise expertise in the NHSL Clinical Research SMT for education sessions and support</li> </ul>	2	Line Manager
7	Engage with and establish Safe staffing/Professional Judgement Tool	<ul style="list-style-type: none"> <li>• Work with NHSL to complete mandatory annual reviews of team staffing, utilising the tools available</li> <li>• Ensure that all NHS staffing practices are fully aligned with relevant staffing legislation and regulatory requirements and the principles of the Health and Care Staffing Act Common Staffing Method and how they apply to clinical research teams</li> </ul>	2	CRNM
8	Encourage staff engagement in leadership development and discussions	<ul style="list-style-type: none"> <li>• Interested staff can utilise the NHSL Experiential Learning and Leadership Academy opportunities</li> <li>• As part of staff annual appraisal relevant leadership and management courses should be discussed and booked</li> </ul>	3	Line Manager

## 8.4 LEARNING & DEVELOPMENT



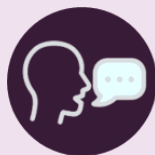
**THEME: Learning & Development** – Empowering research staff with the skills, knowledge, and support needed to grow, innovate, and deliver excellence.

**NHS Lothian values:** This section demonstrates *Care and Compassion, Dignity and Respect, Quality and Responsibility* through structured learning and mentoring, while reinforcing *Teamwork* via collaboration and shared learning across the research community.

Objective(s)		Action Points	Priority (Year)	Responsible person/group*
1a	To provide new employees to the team with a comprehensive and accessible Induction pack for all staff	<ul style="list-style-type: none"> <li>Robust generic inductions packs that can be adapted for each individual team</li> <li>The pack includes essential information about the clinical research team, their job role and job description, setting expectations, and initial objectives</li> <li>Understanding key policies and processes</li> <li>Supporting resources enabling a smooth and confident transition into their role for the first, days, weeks and months</li> <li>Completing any relevant training e.g. ICH GCP, Informed Consent</li> <li>Regular one-to-one meetings, mentorship, feedback and reinforcement, ensure acknowledgement from employee and line manager of expectations, regular appraisals/performance reviews, consistency in leadership for expectations</li> </ul>	1	Line Manager
1b	For staff to understand and be aware of the expectations associated with their role and job description			
2	To develop and implement a Learning & Development Resource Toolkit to guide and assist staff identify relevant learning opportunities	<ul style="list-style-type: none"> <li>Encourage awareness of the CRF 3-year education plan - <a href="https://clinical-research-facility.ed.ac.uk/core-services/education/education-core-3-year-plan">https://clinical-research-facility.ed.ac.uk/core-services/education/education-core-3-year-plan</a></li> <li>B7 Learning and Development Toolkit</li> <li>Extend Toolkits to all roles and bands with the clinical research delivery teams.</li> </ul>	1	All
3	To provide effective practice learning opportunities for students	<ul style="list-style-type: none"> <li>Embed research opportunities for students in their clinical placements – RCN research strategy refers to this, represent metrics associated with these placements and publish annually</li> </ul>	2	All

	[ Continued].	<ul style="list-style-type: none"> <li>• Include research placements during newly qualified employment period</li> <li>• Research teams should promote research activity through posters and marketing</li> <li>• Work closely with Practice Education Facilitators and clinical areas to engage students on clinical placements to spend time with research teams</li> <li>• Increase number of teams hosting students</li> </ul>		
4	All staff will understand the importance of personal development planning and have an up-to-date PDP	<ul style="list-style-type: none"> <li>• A dynamic, goal-oriented document, managed and reviewed in collaboration with the line manager using the Turas system to support ongoing development</li> <li>• Reflects progress of skills development</li> <li>• Personal and professional development will be included in PDP discussions, with staff supported through appropriate allocation of time and resources and the correct area to complete training (e.g. Working from Home, office time)</li> </ul>	<b>2</b>	<b>All</b>
5	To support mentorship opportunities within clinical research that provides for everyone to have the opportunity to become a mentor or mentee to enhance their professional development	<ul style="list-style-type: none"> <li>• Utilise the NHSL Coaching and Mentoring tools – <u>Coaching and Mentoring</u></li> <li>• Enable staff to recognise the benefits of mentoring for skill enhancement and career progression</li> <li>• Utilising NHSL Organisational Development Courses</li> </ul>	<b>2-3</b>	<b>CRNM</b>
6	Support research staff in cultivating collaborative networks within the wider research community to enhance learning and research excellence	<ul style="list-style-type: none"> <li>• Foster peer-to-peer learning among all research staff, both clinical and non-clinical, to share knowledge, skills, and best practices, for example through initiatives like the Research Forum, encourage observership within other teams/specialties</li> <li>• Promote Band 7 Lead Research Nurse meetings</li> <li>• Promote Research Forum and other networking opportunities</li> <li>• Work in partnership with the WTCRF Education Team to strengthen access to high-quality training across the wider research community and to use their input with any developed training</li> </ul>	<b>2-3</b>	<b>All Staff</b>

## 8.5 COMMUNICATION



**THEME: Communication** – Clear, consistent, and collaborative communication to strengthen research delivery and engagement.

**NHS Lothian values:** This section is guided by *Openness* and *Teamwork*, promoting accessible, two-way communication and fostering trust and shared understanding within the research community allowing *Care and Compassion* and *Dignity and Respect*.

Objective(s)	Action Points	Priority (Year)	Responsible person/group*
1 To ensure all clinical research delivery staff have access to a well organised quarterly 'Research Forum' meeting	<ul style="list-style-type: none"> <li>• Hold 4 forums per year with attendance from invited research delivery staff and collect feedback after each forum</li> <li>• Use internal communication channels to invite staff, schedule forums during working hours to maximize participation</li> <li>• Identify areas of development that can be covered within the forum as a shared community learning opportunity, invite speakers</li> <li>• Link the forum focus/agenda into the goals identified in the staff survey questionnaire responses: Study related objectives and staff related objectives – cover one of each? e.g. information on a new way of delivering quality research and interteam building: cross speciality collaboration / peer teaching</li> <li>• Invite clinical managers and staff to attend/present to build cohesion between research and clinical teams</li> </ul>	1	Line Manager
2 Ensure all new staff can attend ACCORD Welcome Day	<ul style="list-style-type: none"> <li>• Encourage all new staff to participate in the Welcome Day within six months of joining</li> </ul>	1	Line Manager
3 Annual report	<ul style="list-style-type: none"> <li>• All clinical research delivery teams will be asked to contribute metrics and text to the annual report to ensure the character of their research specialty is represented accurately and effectively to share with ACCORD and clinical teams</li> </ul>	1	Line Manager

4	To share team newsletters and Impact posters across the NHSL Research Community and Clinical Community	<ul style="list-style-type: none"> <li>• Develop a platform for sharing these newsletters and posters in one place by setting up a Microsoft Teams' channel for research community</li> <li>• Assess the usefulness and how information is best communicated e.g. what do people retain from newsletters/ what information do they want to learn from newsletters/Impact posters</li> <li>• Share these publications with clinical teams to show them what trials their patients are participating in, and benefiting from</li> </ul>	2	All
5	To centralise tools such as those used for organisational governance, learning & education and research management via SharePoint and intranet	<ul style="list-style-type: none"> <li>• Develop a SharePoint and Teams platform <a href="https://learn.microsoft.com/en-us/sharepoint/teams-connected-sites">https://learn.microsoft.com/en-us/sharepoint/teams-connected-sites</a></li> <li>• Utilise OneDrive in addition to the above</li> <li>• Support centralisation and standardisation of documents to support consistency</li> </ul>	2	CRNM
6	To utilise NHSL Research Community social media accounts (BlueSky and LinkedIn) for the sharing of general information, dissemination of job adverts, promotion of conferences, research updates, and news relevant to both staff and the wider research community	<ul style="list-style-type: none"> <li>• Ensure BlueSky and LinkedIn accounts are regularly updated with relevant content, including research studies, job adverts, conferences, and news</li> <li>• Share internal updates and information of interest to staff, complementing or enhancing newsletter content and fostering awareness across the organisation</li> <li>• Highlight individual and team successes, research milestones, and contributions to encourage recognition and celebrate excellence</li> <li>• Provide opportunities for staff interested in media and communications to engage with social media management, developing relevant skills and experience</li> <li>• Assign a dedicated team to manage content, monitor relevance and engagement, and regularly review social media effectiveness to ensure resources are used efficiently</li> </ul>	2	CRNM
7	To establish a NHSL Clinical Research Delivery Community Internet web page	<ul style="list-style-type: none"> <li>• Link this in as a potential opportunity for staff who want to develop skills in WordPress to design a webpage</li> </ul>	2	Communication Working Group
8	To use AI – Copilot effectively	<ul style="list-style-type: none"> <li>• Encourage staff to actively engage with Microsoft Copilot Chat, with focus on its practical use in a research environment</li> <li>• Emphasise the importance of responsible AI use ensuring staff maintain critical thinking, analytical skills, and professional judgement when integrating AI tools into their work</li> </ul>	3	All

	<i>[ Continued].</i>	<ul style="list-style-type: none"> <li>• Foster a culture of digital curiosity and confidence, where technology complements human expertise rather than replacing it</li> </ul>		
9	Utilise recruitment drives	<ul style="list-style-type: none"> <li>• Promote clinical research successes and achievements, make NHSL a place staff want to come to work</li> </ul>	<b>3</b>	<b>All</b>
10	Seamless collaboration across the research and delivery landscape.	<ul style="list-style-type: none"> <li>• Establish safe and trustful relationships and meeting environments to promote psychological safety and meaningful engagement, demonstrating authentic care, respect and understanding</li> <li>• Communicate clear expectations around regular meetings - attend consistently, provide feedback, and stay engaged</li> </ul>	<b>3</b>	<b>All</b>

## 8.6 RESEARCH GOVERNANCE



**THEME: Research Governance** – Uphold research governance requirements to support the integrity, compliance, and confidence of clinical trials in NHS Lothian.

**NHS Lothian values:** This section upholds *Quality* and *Honesty* through rigorous governance, while emphasising *Responsibility* in the conduct and oversight of all research.

	Objective(s)	Action Points	Priority (Year)	Responsible person/group*
1	To improve communications and transparency between R&D (SMT, contracts, governance & finance) and the clinical research delivery staff and teams	<ul style="list-style-type: none"> <li>Clinical research managers act as an interface between R&amp;D and the Clinical research delivery staff and teams, providing representation, collaboration and communication</li> <li>Regular senior meetings between B&amp;A managers (or deputies) and the R&amp;D SMT</li> <li>The role of the CRNM should be made transparent and clearly communicated across all teams. This role will serve as a key conduit between the delivery teams and the R&amp;D function, ensuring alignment, efficient knowledge transfer and seamless collaboration using established communication channels, intranet, and research email distribution list</li> </ul>	1	CRNM
2	To ensure focus on prompt site-set up and recruitment in line with the UK Clinical Research Delivery Programme's Study Set-Up Plan	<ul style="list-style-type: none"> <li>Work in collaboration with R&amp;D, local PIs and research delivery teams to ensure recruitment of first participants into research studies within 30 days of Sponsor green light for both commercial and non-commercial studies</li> </ul>	1	All
3	To ensure appropriate staff/finance responsible staff can attend the quarterly drop-in sessions e.g. finance, EDGE, contracts, governance	<ul style="list-style-type: none"> <li>R&amp;D Finance/EDGE responsible staff will attend each drop-in session or send a deputy to attend in their place</li> <li>Staff will prepare questions and queries to support the income recovery for all trial activity</li> <li>R&amp;D Finance team will prepare a 5–10-minute training for each drop-in session</li> </ul>	1	CRNM

	[ Continued].	<ul style="list-style-type: none"> <li>• There will be one quarterly drop-in session of Finance, EDGE and one for Contracts/Governance</li> <li>• Create a monthly 'Management' eNewsletter to advertise upcoming meetings and drop-in sessions</li> </ul>		
4	To ensure all staff are aware of and have read and signed off relevant SOPs via the ACCORD (R&D) website	<ul style="list-style-type: none"> <li>• Ensure staff know where to find the SOPs and why they are so important</li> <li>• Reading &amp; signing ACCORD (R&amp;D) SOPs is a requirement for all clinical research delivery staff and should be recorded within each team</li> <li>• Create a robust system to record staff sign off</li> </ul>	1	Line manager
5	To ensure teams are aware of and feel able to contribute to the quarterly Risk Register	<ul style="list-style-type: none"> <li>• Senior staff should be aware, and contribute to, the risk register on behalf of their teams and trials</li> <li>• Share risk registers regularly with R&amp;D</li> <li>• Update regularly as changes occur</li> </ul>	1	CRNM
6	To monitor trial Feasibility requests and feedback	<ul style="list-style-type: none"> <li>• Develop a system to track and analyse trial feasibility requests and feedback</li> <li>• Collect data on feasibility requests</li> <li>• Collaborate with relevant teams to implement a tracking system</li> <li>• Ensure trial feasibility is properly assessed</li> <li>• Engage with R&amp;D commercial and non-commercial for support in feasibility</li> </ul>	2	CRNM
7	To identify ways of engaging with and supporting the R&D approvals process and implementation of research studies	<ul style="list-style-type: none"> <li>• To monitor the approvals process, and document and report any issues of concern</li> <li>• Consider setting up a process to monitor approvals timelines and track issues and delays from a clinical research delivery teams' perspective</li> <li>• Set up communication pathways to assist</li> <li>• Support staff with data asset registry systems</li> </ul>	2	Research Team Lead
8	To support Patient-Public Involvement (PPI) groups as part of research specialty engagement and in preparation for new research proposals and grant applications	<ul style="list-style-type: none"> <li>• To support and participate Patient Public Involvement exercises as and when required for grant applications and specific research questions for public/community opinion</li> <li>• Engage with James Lind Alliance (JLA) Priority Setting Partnership process when they arise (specialty specific)</li> <li>• Contact PPI Lead, WTCRF for further advice on running a PPI group</li> </ul>	3	Research Team Lead

## 9 BIBLIOGRAPHY

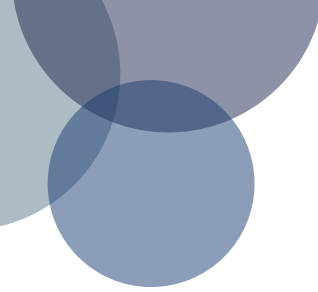
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1. NHS Lothian Research & Development Research Strategy 2022-2027
2. Reimagining Nursing & Midwifery in the NHS Lothian Strategic Plan 2023-2028
3. NHS Lothian: Neuroprogressive and Dementia Network, Team Strategy 2024-2027
4. NHS Lothian – Our Values
5. Our Future Health

# Clinical Research Delivery Community

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