EVALUATION PLANNING TEMPLATE

Title of Intervention	*General Managers Programme – Cohort 2*
Context	*It was highlighted by our organisational members that in the current climate it is increasingly difficult to recruit to the post of General Manager and that this is a succession planning and talent management issue.* *Due to the complexity of the role people either feel they do not have the necessary skill set to apply or they take up the post and only stay in it for a short period. This is leaving organisations with a recruitment gap on this pivotal role.*
Theory of Change	*Delegates will gain a greater understanding in the 4 key areas that have been identified as being imperative to general manager or equivalent roles.* *These are:* • *Resilience* • *Creating your own team culture* • *Motivating and engaging your team* • *Strategic Insight* *They will identify their strengths and development areas through a HLM 360 report and coaching whilst also gaining a greater understanding of the journey to become top leaders in the NHS.* *All this will equip delegates with the confidence and skills to undertake the role of a general managers leading to them moving from having the potential to move into the role in 1-3 years to being in the 'ready now' talent pool. This will then have a positive impact on organisations and the system by lessening the current recruitment gap in this role.*
Intervention	*The General Managers Programme is a seven day programme spread across a 12 week period. The cohort will be made up of 21 delegates who are either aspiring to or new to a general manager or equivalent role.* *The programme includes the following:* *Day 1 – Q&A session with a top leader panel, action learning sets and individual coaching sessions* *Day 2 – Resilience masterclass and action learning sets* *Day 3 – Individual coaching sessions and action learning sets* *Day 4 – Strategic insight masterclass and engaging your team masterclass* *Day 5 – Culture masterclass and action learning sets* *Day 6 – Individual coaching sessions and action learning sets* *Day 7 – Speaker on Quality Improvement and Implementing change and group presentations on implementation of learning from the programme.* *Delegates will be asked to complete a healthcare leadership model 360 degree questionnaire which will help them to 'hold the mirror up'*

EVALUATION PLANNING TEMPLATE

	against themselves and review feedback on their behaviours and working styles. There will be no specific programme day for a facilitated feedback session to be given. Delegates will instead be allocated a feedback facilitator and asked to arrange their own facilitation session outside of the programme days, but before day 6 of the programme. *The delegates and their line manager / sponsor will be asked to complete the attached talent grid / likert scale document at the start and then again at the end of the programme.* Questionnaire to be completed on Day 1 a
Expected Outcomes	*Examples of implementation of learning in the work place, shown through feedback in programme days, action learning sets and final day presentations.* *An increase in readiness for the general manager's role shown through a shift in the collective measurement of the cohort on the talent management 9 box grid.* *An increase in confidence to take up the general manager post and an increase in knowledge in the 4 key areas shown through a shift in the collective measurement of the cohort on the Likert scale.* *Delegates improvement in the development areas that were identified by line managers / sponsors at the application stage, shown through feedback from line managers / sponsors post completion of the programme.* *A number of delegates on the programme to apply for / gain a general manager or equivalent role either during or after completion of the programme. To be evidenced through case studies sent out 3 months post completion of the programme.*

EVIDENCE GATHERING TEMPLATE

		Before	During	After
Title of Intervention		*General Managers Programme – Cohort 2*		
Individual		*Completion of an application form showing that the individual is either new to or aspiring to a general manager or equivalent post.*	*Active participation and attendance at all seven programme days and undertaking pre-work / the HLM 360 in their own time.* *Feedback from participants at programme days and in action learning sets that they are putting into practice new ways of thinking, understanding and behaving.* *Participant's presentations on the final day of the programme which highlights what they have learnt and how they have implemented this learning back into their organisation.*	*Self-reported increase in confidence to take up a general manager or equivalent post through the use of the likert scale.* *Self-reported increase in knowledge in the 4 keys areas identified through the use of the likert scale.* *Self-reported increase in skills and confidence to take up a general managers or equivalent post through the use of the Talent management 9 box grid.* *Completion of a case study document 3 months post completion of the programme which identifies if the participant has since gained a promotion or applied for a new role and what the impact has been at an individual, team and organisational level from participating in the programme.*

EVIDENCE GATHERING TEMPLATE

Team/Organisational/System	*Organisations to effectively market the programme by disseminating round-up and direct emails to the appropriate target audience within their organisation/system.* *Confirmation that the organisation feels the individual is suitable for the programme and that they support their participation. This evidenced by the line manager / sponsor completing section 8 of the application form and signing it. Plus the completion of the talent grid / Likert document.*	*Organisation supports the participants attendance at all programme days, provides time for them to undertake pre-work / HLM 360 outside of the programme days.* *Encouragement of implementation and dissemination learning back into the organisation through one to ones with line manager / sponsors or team meetings.*	*Line manager / sponsor completes a document 3 months post completion of the programme to assess if the participant has improved in the development areas they identified and give examples of any shared learning they have witnessed at a team, organisational or system level.* *Line manager / sponsor to complete the talent grid / Likert document at the end of the programme to identify any positive shifts compared to the version completed at the start of the programme.*
Facilitator	*Reviewing the development areas identified on the delegates application forms and where possible ensuring these are covered in the programme.*	*Coaches and ALS facilitators to encourage participants to create action plans and to report back on any attempts to implement learning in coaching and ALS sessions.*	*Positive rating of facilitation, coaching and ALS are provided by the participants.* *Any lesson learnt taken from participant's feedback are to be documents and passed onto facilitators for future learning.* *Feedback from participants, line managers and sponsors show that what has been taught during the programme has been adopted back in their organisation.*

EVALUATION REPORT TEMPLATE

NB – remember to include the Evaluation Planning Template and the Evidence Gathering Template as Appendices 1 and 2

1. Title Section

Title of Intervention	General Managers Programme Cohort 2
Academy	East Midlands Leadership Academy
Programme Lead/Author	Anonymised
Contact Details	Anonymised
Date	September-November 2017
Business Plan Area	Local Interventions
Key Words	General Managers Talent Management Succession Planning
Level of Complexity	Medium

2. Brief Description of the Intervention

The General Managers Programme is a seven day programme spread across a 12 week period, made up of 21 delegates who are either aspiring to or new to a general manager or equivalent role.

The programme included 4 masterclasses on resilience, strategic insight and culture and motivating and engaging others. With a wraparound of action learning and coaching interventions to further support development.

Delegates also completed a healthcare leadership model 360 degree questionnaire in order to 'hold the mirror up' against themselves and review feedback on their leadership style behaviours and impact.

3. Context

It was highlighted by our organisational members that in the current climate it is increasingly difficult to recruit to the post of General Manager and that this is a succession planning and talent management issue.

Due to the complexity of the role people either feel they do not have the necessary skill set to apply or they take up the post and only stay in it for a short period. This is leaving organisations with a recruitment gap on this pivotal role.

4. Evaluation Activity

9 Box Talent Grid – *to what extent has there been an increase in readiness for the general manager's role*

21 participants completed the General Managers Programme. When asked to rate themselves in terms of performance and career potential on the 9-box grid 50% of those who completed the questionnaire showed a positive shift and 50% felt they had stayed the same in terms of their potential and performance. (This is based on 10 out of 21 participants who provided the pre and post programme data).

In comparison 54% of delegate sponsors noted a positive shift, 36% said they had stayed the same and 10% felt there was a negative shift. (This is based on 11 out of 21 Sponsors fully completing the pre and post programme questionnaire).

Likert Scale - *increase in confidence to take up the general manager post and an increase in knowledge in the 4 key areas shown*

When questioned before and after the programme on their confidence to step into a General Managers role; 40% of participants felt they had made a positive shift following completion of the programme, 40% felt they had stayed the same and 20% felt that they were less ready.

For the same question 27% of sponsors felt that there had been a positive shift in readiness for their participants, 63% didn't feel there had been any shift and 10% felt that their participant was less confident than before for a General Manager role.

Against the 4 key areas that were identified as part of the programme design and planning as being imperative to general manager or equivalent roles, the following data has been gathered using the Likert scale to demonstrate programme impact:

- Resilience – *63% of participants felt they had a better understanding of resilience post programme compared to 18% of their sponsors.*
- Creating your own team culture – *90% of delegates felt that they had developed in their ability to create a positive team culture compared to 45% of sponsors.*
- Motivating and engaging your team - *63% of participants felt that their understanding had increased compared to 36% of sponsors.*
- Strategic Insight – *82% of participants felt that they were now more strategic and commercially aware. 45% of sponsors also saw a positive shift.*

The biggest shift is in the area of creating your own team culture with 90% of participants stating that their understanding has increased. This is further evidenced in the feedback from the Engaging, Involving and Motivating People Masterclass in which comments included:

"Best Masterclass so far…made me think about my own behaviour and the effect it has on others."

"The best Masterclass I have ever intended…truly inspiring."

Overall all masterclasses were well received with 82% of participants who completed the Survey Monkey questionnaires rating each session as either Good or Excellent. In cases where feedback was less positive this tended to be in relation to the fact that the sessions were half a day and participants didn't feel they had enough time to really explore the content in order to put it into practice back in the workplace.

Further evidence of the understanding of the 4 key areas was demonstrated on the final day through the delegate presentations as they used creative and innovative ways to showcase their learning. One group in particular had used a 'British Bake-Off' theme to compare the ingredients of a General Manger to the ingredients of making a cake:
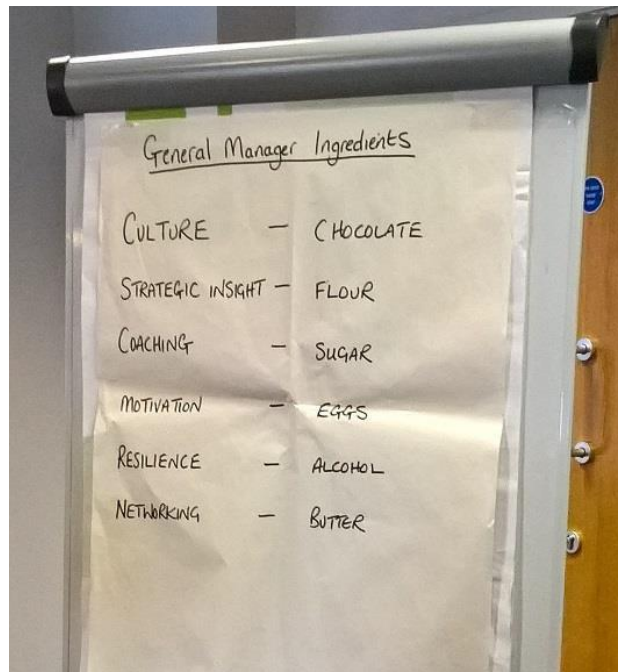
Sponsor Feedback:

At the end of the programme sponsors were re-sent the 3 development areas they had identified for their participant at the applications stage. We had 4 sponsors feedback as to whether they had observed any improvement:

Sponsor 1

1) An understanding of how to remain resilient in challenging times, with practical protective examples to put into practice
   Unfortunately this hasn't been observed.

2) A better understanding of how to address team cultural issues
   Yes; willing to address issues and find innovative ways of raising concerns and looking for opportunities to challenge and resolve

3) An increased awareness of the business of the NHS alongside an understanding of the development opportunities that the NHS needs to progress to exist
Not specifically observed

Sponsor 2

1) Development in the role as a leader; identifying areas of advancement in building a team.
Clearly has embraced this and is keen to build a resilient team

2) An understanding of how to remain resilient in challenging times; how to look after oneself.
Is aware of the need to care for self and others

3) An increased awareness of the business of the NHS alongside an understanding of how to play a role and influence this.
Not specifically observed

Sponsor 3

1) Managing unrealistic expectations in a challenging work environment
Has shown to manage these situations very well. Definitely developing in this area.

2) Providing leadership and management support to a large team - being their leader – The team have been very responsive to HD's leadership style and skills.

3) Understanding wider strategic and political context - again, very much developing in this area and being helped by exposure to some difficult day to day issues.

Sponsor 4

1) How to effectively engage and influence people/ services - this delegate has started to be more socially aware and is taking time (a few minutes at a time) to build relationships and keep people involved

2) To better understand the role of the general manager to gain insight on their priorities, expectations and barriers - I have not had opportunity to see this yet

3) To gain more personal awareness of how behaviours and language can be modified to be received by others in the best possible way - I have noticed that this delegate catches and corrects himself more often when he is not being received in the best light; however this still remains an area of development

Survey Monkey - *Examples of implementation of learning in the work place, shown through feedback following programme days.*

The following aspects of the programme were identified as being the most beneficial to their learning:

- Networking/meeting new people
- Quality of speakers
- Coaching
- Action learning

Examples captured of things that participants have done differently in their job as a result of learning from the programme:

"Changed the way I approach Chairing meetings and how I can create a more cohesive team. Consideration to how I manage and motivate my direct reports."

"More use of coaching and active listening in my current role plus re-evaluated my future career path."

"I have had those difficult conversations with my line manager. I have also proactively sought to delegate more rather than doing everything just to get it done."

"Put more structure in place."

"I have changed the way I manage my team and in particular, the team meetings using some of the masterclass examples. I have also looked at and questioned the organisations business acumen as the course gave me insight into what this is and how it should factor in the business."

"Changes to the way I manage my team. Also created and presented a team development day based on the masterclasses."

"Improved strategic insight and use of analysis of work to ensure better targeting of priorities."

"Built confidence in strategic planning and team dynamics/performance."

Action learning was highlighted as being a good opportunity to share 'live' issues and work through problems drawing on the perspectives of others and feedback strengthened for this intervention as the programme progressed and delegates developed trust in their groups. Although for one individual pointed out that they had not found the action learning to be as helpful due to a few individuals domineering the conversation.

Feedback from the **coaching** sessions shows that there has been great impact on an individual level enabling and supporting participants to focus and shape their future paths:

"My coach has helped me enormously. I have never had coaching before and after this experience I am really keen to explore this as an area for my won development. Jayne really 'got me'. I was in tears at our first session, which surprised me but her questioning technique helped me to explore myself in a way that I have never done before. I can honestly say that I am more resilient, stronger and confident as a result of coaching."

"Really useful to have a coach and focus on the issues at hand with solutions/actions."

"I had several 'light bulb' moments."

HCLM 360 Feedback -

All 21 participants completed a Healthcare Leadership 360 feedback session in order to 'hold the mirror up' against themselves and review feedback on their behaviours and working styles. Some participants also used their 360 report to reflect further on their strengths and development areas through their coaching sessions. One individual commented that they would have preferred their coach to have also been their 360 feedback facilitator rather than have a separate facilitator to do this. However, there is little feedback to evidence the impact of the 360's on the participants learning.

Talent Management
No participants at the end of the 12 week programme had reported to have gained a General Managers position.

5. Interpretation and Discussion

It is unfortunate that we didn't receive 100% evaluation compliance from both delegates and Sponsors as this has made it difficult to get an overall view of the impact of the programme.

From the data available, however, it does to some extent support the expected programme outcomes outlined at the programme planning stage; that there would be an increase in understanding of strategic insight, resilience, creating a team culture and engaging the team. Where delegates have rated themselves as having the same level of confidence to step into the role along with the same level of understanding in the 4 key areas. This could be interpreted as delegates perhaps not having had the opportunity as yet to implement the learning so it may not be as clear for them as to how much of an impact the new behaviours and skills have had.

Whilst no elements of the programme content were rated poorly, it would also need to be considered as to whether they could be delivered differently in order to see a shift on the Likert scale for all participants. This is to be explored further in 'Recommendations for future programmes'.

It is interesting that, although, there is some positive shift reported by Sponsors, it is consistently to a lesser extent than participants. This could be because the participants are of course closer to the programme than their sponsors so are more aware of their own development. It could also reinforce the fact that the data was captured shortly after programme completion and so there has been little opportunity as yet for Sponsors to observe any distinct changes, which, is supported by some of the written feedback from Sponsors.

In terms of the reported negative shifts by participants and sponsors; whilst we don't actually have any data to support reasoning for this, recent academic research suggests that it is usually because people don't realise that they didn't know as much as they thought they did prior to the programme commencing and consequently, the realisation later in the programme means that people are able to take stock and develop better action plans.

The evaluations suggest that the mix of interventions was successful as the masterclasses, action learning and coaching all featured in the list of most beneficial aspects of the programme. However, the coaching was more positively received than the action learning overall. The feedback in relation to the action learning is quite mixed, but improves from ALS session one through to the ALS session 5 suggesting that this is something that participants settled into as they got to know each other and developed trust over the duration of the programme.

Participants were asked to take ownership of arranging their 360 reports and feedback with an allocated facilitator. Participants were encouraged to use the report to feed into their coaching sessions but because the sessions were arranged independently this happened at different times for each participant. It was therefore difficult to track progress with completing reports. Also participants were not asked as part of the Survey Monkey questionnaires to specifically comment on their 360 feedback experience making it difficult to determine whether they were beneficial to the learning.

6. Costings

Staff Time (estimate)	Third Party costs (commissioned provider/external speakers)	Venue related (Accommodation, room hire, AV support. Catering)	Materials	No. of Participants	TOTAL COST
Programme Lead – 17 days = £2100 Programme Coordinator – 5 days = £450	Masterclass speakers = £3,622 Action Learning Facilitators = £6241 Coaches = £7,219 Key note speaker = £4200 Panel experts = £2339	Venue hire and catering = £10,061	Reflective Workbook = £120	21	£36,352

Comments on Costings:

7. Summary

Whilst no participants have reported to have secured a General Manager role as a result of participating in the programme at this stage. It is evident that most have developed more awareness and are developing the skills and behaviours required to help them step into a General Management role or equivalent. It is also worth noting that for a couple of participants, the programme has enabled them to consider whether this is the correct career path for them or whether it is the right role but wrong organisation leading them to different focus in their future career planning than the one they thought they were on at the beginning of the programme.

Overall the data shows that the General Managers Programme has had a positive impact on shifting the participants learning in the 4 areas considered to be imperative to the General Manager role as well as building confidence in readiness to take on a future General Manager role concluding that the programme has been a successful intervention. However, it is fair to say that there is varying degrees of development for each participant depending on what level they started at in the programme and to what extent they have had the opportunity, motivation and support to take the learning back into the workplace.

8. Recommendations and Lessons Learned

For future cohorts it would be beneficial to look at building in full day as oppose to half day masterclasses in order to give participants more time to explore the content presented – more time for trying out tools/techniques and for whole group discussion. Whilst a half-day can introduce individuals to new concepts, if learning is to be fully embedded more time needs to be allowed.

It would also be worthwhile with the action learning to brief facilitators to use the majority of the first session to provide a bit of background on action learning – the history, principles and purpose. This would be particularly helpful for those who have never been involved in action learning before to understand what it involves, how they can most effectively contribute and how to get the most learning from it. Along with carrying out a trust building exercise to help individuals make those connections and breakdown any barriers right from the off-set.

The 360 reports are quite a key feature in the participants development in terms of 'holding up a mirror' to themselves and understanding their development to becoming a General Manager so it is recommended that a question be included in final Survey Monkey asking participants to reflect not only on their experience of the 360 process but also asking for thoughts on how the reports helped them identify any strengths and development areas and what did they do with this information once they received it? Also, possibly to request a 360 group report to be able to see if there are any specific patterns in their strengths and development areas against the 9 leadership dimensions from a whole cohort perspective. This could then be used to compare to other cohorts over time and help identify any other key leadership development areas that might need to be incorporated into the design of the programme.

It would be helpful to follow-up in 12 months' time with participants to see if any have stepped into a General Manager's role or equivalent and to ascertain whether they feel any learning from the programme can be attributed to this and how this impact might be improved. There are a further two cohorts planned for 2018/19 so as part of the evaluation for these two cohorts we will check-in with participants from cohorts 1 and 2 to explore the longer term impact the programme may have had and to find out if anyone has secured a General manager role or equivalent.

9. Evaluating the Framework

In the interests of continuously improving how the network of leadership academies can improve its approach to evaluation please answer the following questions.

What did you find useful/helpful about using the framework

What did you find not so useful/not so helpful about using the framework

What suggestions, if any, do you have for improving the framework?