



**Synopsis of the
Downstream Evaluation Research Study
for the Dorothy M. Wylie Nursing
and Health Leaders Institutes**

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OVERVIEW

The research study focused on the “downstream” leadership experiences of individuals who have taken leadership development programs. The term *downstream* connotes that a certain amount of time has been spent in the workplace attempting to exercise new leadership skills. Most leadership development programs have a built-in evaluative component which serves to assess whether the specific set of leadership development processes, activities, and materials they received within a given program have provided a useful or impactful learning experience for the individuals involved. Most program evaluations, however, do not provide an assessment of the impact that training may have on participants’ leadership behavior after they return to their place of work, nor do they assess how participants’ subsequent leadership activities are received, or taken up by, the home organization.

The research study tracked the experiences of individuals in their home organizations a few months after taking leadership programming, as they attempt to put into practice the concepts, ideas, and skills they acquired as part of their leadership development program. The research study focused on the personal experiences of these individuals as they practice their leadership training in situ.

The objectives of the study are:

- To understand the experiences of health leaders several months after their participation in leadership training and programs, by focusing on specific leadership activities and related organizational responses.
- To identify and assess the impact of organizational factors perceived to support or impede the practice of effective leadership.
- To recommend strategies that might be employed to facilitate supportive organizational responses to aspiring leaders.

By inviting the participation of several organizations that offer distinct forms of leadership programming, a broad base of comparison was possible between the leadership experiences of participants from a variety of leadership programs who were employed in a variety of roles across a number of Canadian healthcare organizations. The four providers of leadership development programs are: Dorothy M. Wylie Nursing and Health Leaders Institutes [DMW/HLI]; Leaders for Life programs; Master of Arts in Leadership with a Specialization in Health, Royal Roads University, and; Physician Manager Institute, Canadian Medical Association.

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Descriptions of the four providers of leadership development programs:

Dorothy M. Wylie Nursing and Health Leaders Institutes

- Promote the assessment, acquisition and development of a set of core leadership competencies appropriate to the times and settings for today's dynamic health care environment
- Support participants to apply concepts in real life situations through reflective learning and a “home-based” change initiative
- Allow for individual and group assessment of skills and areas for development
- Identify, inspire and support emerging health care leaders.

Leaders for Life

Leadership at the Pulse

- Designed to strengthen the leadership capacity of those who are most directly related to the delivery of healthcare.
- Provides the opportunity to examine real life leadership challenges of different systems of care, specialty areas, professions and resource environments.

Art of Leadership

- Experiential 9 month program based on the LEADS leadership capability framework
- Formal classroom learning and a workplace project

Harvard ManageMentor Plus Pilot

- On-line self directed learning of 6 months duration
- Based on the LEADS leadership capability framework

Master of Arts in Leadership with a Specialization in Health, Royal Roads University

- Online and on-campus studies in areas such as systems thinking, organizational change, learning theories, action research and conflict resolution
- Intended outcomes for graduates include: develop personal, organizational and societal learning practices; use systems theory, thinking and planning in problem discovery, identification and solution skills; apply concepts and models of strategic leadership within the organization; apply action research and evaluation processes to improve decision-making abilities and implement innovation, and create results; use business planning processes and organizational performance measures to implement change from concept to evaluation, and; use evidence-based indicators to analyze and develop strategies to engage employers, interest groups and stakeholders in implementing change

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Physician Manager Institute, Canadian Medical Association

- The Physician Management Institute is CMA's leadership development program designed specifically for physicians working in Canada's health care system.
- Course content and examples are practical and relevant to health care and medical practice in Canada
- Instructors are subject-matter and education experts with an intimate knowledge of Canada's health care environment
- Learning approaches incorporate multiple perspectives, include real-life, real-time activities and promote rich problem-solving among peers
- Multiple courses offered at different levels; participants choose courses of interest

DMW/HLI PROGRAM-SPECIFIC FINDINGS

DMW/HLI: Design

Participants appreciated many aspects of the DMW/HLI, none more than the facility where they lived while taking the program. “The facility was absolutely fabulous. That was very important when you're away from home and travel, it's important to be, you know somewhere that you're comfortable and you've got the amenities that you're used to.” Participants also appreciated the evident organization of the program; one participant noted, “The agenda was quite nicely laid out.”

The variety of participants in terms of roles and geographic locations was appealing and the program's design of shifting people around to create different groupings was favorably received by a number of participants. One participant appreciated “the actual layout of the room and the ability to network, and that has more to do with the logistics of how it was set up.” Another participant noted that she and others initially experienced “anxiety and not [being] sure what to expect, but it was so well laid out and we were changing tables so we weren't always with the same group. So it was nice to have that.”

DMW/HLI: Program Components

Overall, the participants appreciated the opportunity to develop their leadership skills through mechanisms such as the development of a personal leadership plan that provided “an excellent opportunity for self-growth and for self-reflection”. Other program components favorably mentioned included: ice-breaker exercises such as coming together in a group and creating a “group name or theme”; leadership inventories; Emotional Intelligence “tests”; Myers-Briggs classifications.

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Opportunities to network included “meeting and being able to speak with the leaders and some of the speakers that they had there, and that was really very beneficial.” Meeting a range of participants, from individuals who were comfortable in leadership positions through to those who had no leadership experience, was “very helpful” in building the confidence of participants. Participants agreed that the networking opportunities were a key learning component of their program.

The instructors, facilitators and speakers, including keynote speakers, were highly praised by the participants. A participant commented that “a big key point” for her was “the accessibility of the facilitators to help us with our project.” A participant noted that, “The presenters were quite knowledgeable, quite informative and were able to pull together all the information that they were trying to present to us at the leadership conference. So it was well organized and I enjoyed it.” Another said, “I really was looking to say ‘well what’s out there from a literature perspective’...and I was not disappointed in hearing the speakers that they had, who are leaders in their fields.”

One participant noted that she benefited from

...speakers who were very good, very motivational, and then we had Michael Villeneuve who is sort of a visionary for nursing, and talking about how we really need to be thinking of things differently and it's so hard, he gave some really analogies of how we're operating in the past and we really need to move forward and make some changes to keep pace with the way healthcare is going... How rapidly our world is changing and if you want to be a part of it and, a leader in it, you have to accelerate and be very very open-minded about opportunities and changes and so on.

One particular speaker brought high praise from this participant: “We had a speaker on emotional intelligence that I truly enjoyed. He [Rick Lash] was fabulous, and he really gave some insights into emotional intelligence and that kinda stuff.” Another participant commented that “for me one of the big highlights was the work that we did on leadership competencies and the five practices of leadership. They were presented by Barry Posner and he was a dynamic speaker, he's an expert in the area. So for me, that was a really big point.”

Working on a project to bring back to their organizations was for many the highlight of the program. A participant commented, “The biggest activity that we did was the work, the key project that we had to go and work on. So our major project, to me that was the strength of the course.” Another participant noted, “The biggest attribute I saw of the program was actually the project that we worked on. I found that the project was able to help us draw together many of the things that we had learned during the week.” [See Appendix B for detailed answers to questions concerning the participants’ projects.]

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Having time to reflect on their leadership styles and impact on others was very much appreciated by the participants. Many participants commented that they did not have the opportunity to reflect in their day to day lives. One participant noted,

It's a chance to kind of to look at things differently and reflect more specifically than at work, yes definitely you need to reflect and so on but just from a timetable standpoint, you know you don't have that flexibility that you do when you're allowed to go to an event like that for a week.

DMW/HLI: Leadership Skills

Participants varied in what they considered to be the most valuable leadership skill they learned, or had reinforced, through their participation in a DMW/HLI leadership program. One said,

I would have to say the thing that I got out of it was confidence, confidence and verification that I'm on the right track. My style is very much involving other people and taking people who've never perhaps done things before and giving them opportunity. I believe in that and I think that that probably was what I took out of there, probably, the most.

Another participant noted,

I've always been able to work effectively with a team. My difficulty usually lies within standing up there and being the groundbreaker, and saying 'No this is the road I think we should go'. I tend to stay back and say 'Well, ok yah, go with the flow' kinda thing? So I've been able to develop that a little further, that one piece of me. So that, to me is huge.

Developing their listening skills and receiving confirmation of the importance of listening were key concepts for a number of the participants. Seeing role plays that emphasized the part that active listening can play in the workplace was very helpful for one participant. She learned to value

...being a completely attentive listener before jumping ahead... you know you're listening and then you're starting to sorta think, oh ok well these are different strategies and then you're almost forming an opinion, before really absorbing and then considering what the person has said. I think that you have to discipline yourself to really listen, and I think that came through as one of the key concepts that for me was very helpful to take away.

Another participant appreciated the importance of "learning the use of the proper terminology when you talk about leadership". This participant also noted that her leadership skills were increased by her improved "ability to say, to myself, it's ok if I don't agree with everybody else. It's ok to voice your opinion and your concerns."

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DMW/HLI: What Worked/What Didn't Work

Praise for the DMW/HLI programs was universal amongst the participants. Many participants mentioned that they had not known what to expect before beginning the program and they were very impressed with their program by the end of it. One said, "I didn't really know what to expect... my expectations when I went in were to learn as much as I could about the topic and to gain some new skills, in reference to a leadership, an effective leadership." Other comments included: "it was a very positive experience. I thought it was extremely well done and very valuable and I am very appreciative for the opportunity ", and; "I gotta say, well worth the money; very good, almost on the verge of excellence, very good".

Most participants reported that they gained what they hoped to going into their program. One participant commented, "Part of my goals were number one to measure my thoughts and my experience and my understanding and knowledge against that of other people and I was certainly able to do that." Another said, "Networking opportunities were great... and it did meet my expectations, very much so." Summing up her experience another participant said, "So, I came away feeling like I had learned something, that it was worthwhile, for me. And that I could certainly use it, in my work life and my personal life."

The practice of having participants attend with their work colleagues was considered particularly beneficial. One participant commented, "Attending with other managers opened up a whole new resource for me that I didn't know was available here. Networking with other managers, and I don't think I would've got that had I not gone to Dorothy Wylie." Another appreciated "the fact that I was able to tie it in with the clinical leader that's working with me. So, I mean we really tried to maximize, to say well this is a great opportunity for us as leaders and for our own development and let's also really try to use that to enrich and focus our working relationship in serving the clinical areas."

In terms of whether participants gained new knowledge or confirmed prior understandings, most participants agreed that the program consolidated and validated what they knew about leadership before entering the program. Comments included: "I really, thoroughly enjoyed it. I can't say that, did I learn anything I didn't already know? No. But did it really ground me and confirm what I know? Yes." Another participant said, "The reinforcement part was the biggest part for me."

There were very few comments indicating any dissatisfaction with their programs. One participant noted that

I would have liked to see some sessions really geared to the more senior leader around challenging status quo, around outcome measures to the leadership activities. To looking at, what are some of the things that more senior leaders are dealing with, that might make living these frameworks and these principles more challenging? I would've liked that. It was

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more geared to the average, person who was in the room, and not necessarily to any part that was more geared to more senior leaders.

Another participant suggested that alternatives to doing a “concrete” project could be provided for certain participants. She suggested that “[A project] could be issue-based, or situation-based, or, ethical factor-based, so to say, in healthcare right now we're dealing with these kinds of issues, is this something that everybody's dealing with? Ok, so let's talk about using these principles in how we are going to be addressing those issues in our healthcare environment.”

Some participants were eager to “go further” in their leadership studies and suggested that their DMW/HLI leadership program could provide suggestions as to next steps in that direction. Topics of interest to explore further included ethics and “the relationship between ethics and leadership”.

CROSS-ANALYSIS RESULTS

An analysis of all participants’ responses was completed focusing on the topics of leadership and organization. Themes included: Defining Leadership; Changes in Leadership Behavior Due to Program; Interest in Leadership; Back in the Workplace; Leadership Skills in the Workplace; Organizational Supports; Organizational Barriers; Suggestions for Organizations, and; Benefits to Organizations.

In looking at the cross-program analysis of workplace supports and obstacles concerning participants employing their leadership skills, it is evident that many health care organizations have instituted practices that facilitate leadership behavior. Organizational support of leadership development was considered a key aspect to ensure leadership behaviors flourished. Participants spoke highly of organizations that encouraged new approaches to team-building and within those organizations personnel appear to appreciate the new leadership skills supervisors bring back from their leadership development programs.

Although the vast majority of participants believed they were well supported in their leadership efforts by their organization, most participants did have examples of unsupportive organizational behaviors. Supporting professional development was suggested by a number of participants as the best manner in which organizations could maximize the leadership efforts of employees.

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DMW/HLI-SPECIFIC IMPLICATIONS

Within this study in general, and within the DMW/HLI cohort in particular, there was a great deal of concurrence amongst the participants in terms of their responses to the interview questions. Such concurrence should allow the DMW/HLI to have a certain level of confidence going forward with actions stemming from the findings of this study.

While there was little feedback directed toward potential improvements in the actual DMW/HLI programs, the responses to the DMW/HLI-specific questions [See Appendix A] indicate that organizations are not consistently or effectively managing their role when sending employees to a DMW/HLI program. The expectation is that participants have the opportunity to discuss their projects with senior leaders before and after attending their program, thereby setting the stage for implementation of their project. This does not seem to be what is occurring in a significant number of organizations.

The DMW/HLI could consider reviewing the project component of the curricula, focusing on the current messaging to organizations concerning their role in projects. Perhaps the DMW/HLI could provide additional messaging to maximize organizational support of participants' projects? One participant suggested that not all projects needed to be action-based, remarking that some projects could be less "concrete" and more "issue-based".

It was noted that some organizations utilize "self identification" practices for DMW/HLI program attendance and that this approach may not yield the employees who would most benefit from the program. The DMW/HLI may want to consider whether the Institute has a role to play in encouraging such organizations to be more proactive in the selection of employees attending DMW/HLI programs.

Many participants expressed an interest in continuing the learning and networking opportunities and growth they experienced during their DMW/HLI program. Therefore, the DMW/HLI may want to consider if the Institute should develop "refresher" or "next level" leadership courses.

APPENDIX A: DMW/HLI Program-specific Question Responses

N=21

- 5: NLI-15; 9: NLI-14; 7: HLI-4

1. To what extent have you been successful in carrying out the project you initiated at the Leadership Institute? Please describe in detail.

- Detail generally not provided [some detail is specific enough that it would identify the participant – participants asked not to be identified when discussing detail]
- The support of leadership was, naturally, key to the success of any project
- What seemed to be most helpful was an organizational open attitude to change and good communication pathways, ensuring that all those impacted are kept informed and their input is utilized
- The Institute's emphasis on measurable, achievable goals was considered key in the success of a project
- Factors that contributed to the success of projects included:
 - "...commitment and leadership from the nursing leadership."
 - "Some of those, tools although I can't think specifically but, like the facilitation tools or skills also were helpful. I guess just to go back to the evidence and that we were able to bring back with us from the institute, was also helpful. You know so, to be able to say ok, this is, has been proven that this is a successful way to do something, was quite helpful."
 - "A passion that we need to complete the project. A strong, belief between myself and my partner that, this is an area of patient care that can be improved."

1. a. If not as successful, what were the major obstacles or challenges that inhibited your success?

- Project suggested by leaders had already been done by leaders so needed to go to a bigger scale which presented financial obstacles
- Projects face bureaucratic hurdles that must be negotiated so can take a long time to actualize the project
- Resources (financial and human resources) a very big issue; many demands for limited resources
- Shifting roles and shifting organizational structures slow down or derail projects

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2. Did you have the opportunity to meet with a senior leader in your organization prior to attending the Institute? If yes, what did you discuss?

Yes: 13

- 3 NLI-15; 7 NLI-14; 3 HLI-4

No: 4

- 2 NLI-15; 2 NLI-14

Sort of: 2

- 2 HLI-4

No answer: 2

- 2 HLI-4

NLI-15

Yes:

- “jumped the gun” and suggested own project rather than being told what to do
- Received lots of support and opportunities to discuss project

No:

- went at the last minute
- not offered the opportunity to discuss a project

NLI-14

This group seemed to have a variety of informal introductions to upcoming project work in the NLI-14; either through colleagues or as an aside at regular meetings with supervisors.

HLI-4

All received advance support for their project.

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3. Have you had the opportunity to discuss your project and your learning from the Institute with a senior leader or other mentor since returning to your place of employment? If yes, what did you discuss?

Yes: 7

- 2 NLI-15; 2 NLI-14; 3 HLI-4

No: 5

- 2 NLI-15; 2 NLI-14; 1 HLI-4

Sort of: 4

- 4 NLI-14

No answer: 5

- 1 NLI-15; 1 NLI-14; 3 HLI-4

NLI-15

Yes: One officially and the other as a byproduct of other contact

No: One due to financial implications the supervisor was avoiding; the other too busy

NLI-14

Yes: Mostly informal discussion; two had a formal discussion

No: Too busy; major financial implications impeded further discussion

HL-4

Yes: Well supported

No: Supervisor had “no interest at all”

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4. Have you had an opportunity to present your project or other leadership work at a conference or workshop? Was this a new experience for you? Was your organization supportive of this activity?

Yes: 12

- 2 NLI-15; 7 NLI-14; 3 HLI-4

No: 5

- 1 NLI-15; 2 NLI-14; 2 HLI-4

No answer: 4

- 2 NLI-15; 2 HLI-4

The participants who had not had the opportunity to present their projects, all believed they would have the opportunity in the future.

5. Do you connect on a regular basis with other graduates from the Institute? If yes, how, when, and what do you discuss?

Yes: 8

- 2 NLI-15; 3 NLI-14; 3 HLI-4

No: 2

- 2 NLI-14

Work Colleagues: 8

- 2 NLI-15; 3 NLI-14; 3 HLI-4

No answer: 3

- 1 NLI-15; 1 NLI-14; 1 HLI-4

Largely the participants were in contact with their work colleagues and they discussed best practices and other leadership resolutions to issues. The participants who were in touch with others from outside their organizations tended to have more informal contacts, e.g., “fun emails”.

6. Do you see additional opportunities for your organization to utilize the learnings which you and your colleagues gained at the Institute? If yes, please describe.

- “I think the way, we would best utilize [the learnings from the Institute] is if everybody had the same vision. If we were all on the same page, we utilize the same, leadership model, maybe not the same techniques but we, we were all had the same vision, it would be much easier.... Perhaps, bringing back the information and instead of just sharing it within our, our level of management, moving up and down.”
- “There have been, heaps of projects throughout this college that have been Dorothy Wylie inspired. So, you know I think people are continually bringing back, the things that they've been doing and, presenting them or, you know doing something with, their project.”