

evaluations help the team reflect on their accomplishments and the success of culture shifts. The evaluation process at this time can include surveys, self-assessments, face-to-face interviews, online pulse surveys, and many other formats that help assess the team's effectiveness and performance in leading the change.

An effective evaluation process results in rich and meaningful data to help the team understand how they are leading the changes, what they are doing well, and where they need to change or renew their plans. The evaluation process should also analyze the objectives of the change and the development program, as well as the effectiveness of the strategies, tools, and techniques used for development. These too may need adjustments along the way. The evaluation process should be conducted at key milestones of the LMC Process.

In part 2, you will find a sample of the Evaluating and Sustaining Meaningful Change Exercise, which includes an assessment that the team can do to measure how well they are leading culture shifts at each stage of the LMC Process.

At this stage, you can also do an online self-assessment survey of the change leadership competencies mentioned earlier and the team's values. The results should be shared with the team at each stage or milestone so they can validate the findings and together decide on their next steps.

→ **Case Study: Using CoachingOurselves to Build Skills in Leading a Change Effort**

Here is an example of how Dr. Cynthia Smith, dean of the School of Health and Human Services (HHS) at Camosun College in Victoria, British Columbia, used CoachingOurselves (CO) as part of her work with the LMC Process to develop a team of leaders and managers in support of a transformational change in HHS.

HHS offers more than 15 programs, including a joint degree, a post-degree diploma, certificates, and university

transfer courses. With buildings on two campuses, HHS serves over 1,000 students and employs 100 faculty and staff, mostly in the newly finished Alex & Jo Campbell Centre for Health and Wellness.

These HHS programs fall into six departments, each with a chair who leads faculty development and the financial and program management of the department. Faculty take on the chair role for a three-year term, with the possibility of renewal. Faculty are content experts who teach in their discipline. They usually do not have any specific management training, yet having taken on a department leadership role, they are interested in gaining these skills. The college offers both teaching and leadership training as well as training specific to human resources and financial and business processes, but does not offer training on management skills per se. In addition to meeting the needs of faculty performing the chair role, leadership and management skills were especially relevant at this time, as the college had a new strategic plan with which HHS needed to align. These strategic priorities would result in significant changes that the team of department chairs would have to lead and manage.

In addition, the college was undertaking the greatest change in its history with the construction of a new building to house all HHS programs on another campus. This would entail the movement of HHS faculty, staff, and equipment to the new campus, and the movement of other college departments to fill the space vacated by HHS at the Lansdowne Campus. A plan to support the move to a new location was in progress at the time of the CO program, and the same team of department chairs would also be leading and managing these strategic priorities.

Recognizing the need for management training, Cynthia, along with her HHS leadership team composed of the six chairs and two senior administrative support personnel, participated in a CO program designed to provide them with

an opportunity to build their understanding of and skills in leading and managing change. The details of their program were as follows.

Objectives

The objectives for the HHS CO program were to

1. provide the HHS leadership group an opportunity to reflect on their practice of leading and managing;
2. learn concepts and tools to create a shared mindset and advance their ability to lead and manage in the School of Health and Human Services; and
3. strengthen the leadership group's ability to work together as a senior leadership team.

Table 7 shows an overview of what we referred to as the HHS Leadership Group Development Program, which was based on the LMC Framework and Process, along with several of the LMC activities discussed in this chapter and three CO courses.

This program was designed to develop the HHS leadership team in real time, improving their competencies as they went through it. The program took place over a nine-month period and was led by a design team who provided oversight and coordination of the needs assessment, the three CO sessions, the evaluation process, a train-the-trainer module for CO, and other activities. The design team was composed of Cynthia, the dean, the associate dean, a program manager, and me as an external consultant and coach.

First, as shown at the top of this chart, the design group began with strategic and operational alignment work. This was led and managed by Cynthia and the chairs. Given the academic culture, we also needed to ensure the CO program development process was collaborative, was built on wise practices, and, as much as possible, used evidence-based research.

Table 7 Overview of HHS Leadership Group Development Program

Alignment Process				
Vision: Inspiring life-changing learning, conducting a strategic planning session, aligning the nursing department, planning for the move to a new building, and delivering the HHS programs.				
CO Launch	CO Topic 1	CO Topic 2	CO Topic 3	ExperienceChange Workshop
Envisioning Success Exercise Leadership team needs assessment	<i>Managing on the Planes of Information, People, and Action</i> by Henry Mintzberg	<i>Strategic Blindspots</i> by Estelle Métaeyer	<i>Probing into Culture</i> by Edgar Schein	HHS leadership group and program leaders
Learning in Action				
<p><i>Simply Managing</i> by Henry Mintzberg, coaching, readings, tools, and resources to advance personal, team, and program development</p> <p>Management Happenings</p>				
CoachingOurselves Evaluation Process				
<p>Monthly design team meetings to reflect on CO process, impact, and topic selection</p> <p>CoachingOurselves online evaluation, train-the-trainer development</p>				

In the next phase, we launched the CO program with an overview of CO, the LMC Envisioning Success Exercise (discussed earlier in the chapter), and a needs assessment to ensure the program elements and topics were relevant for the chairs and would meet the needs of the group. Following their approval, we provided a list of CO topics, and the group selected three they found to be most relevant given their work as the leadership group. Change management was especially important at this time, so they selected the topics shown in Table 7 to gain an understanding of managing, culture change, and learning skills to work with faculty.

The leadership group then met every two months to complete each CO topic, followed by a full-day workshop called ExperienceChange (explained in chapter 4) that was custom-designed for this leadership group and their program leaders.

In the next phase, Learning in Action, which took place between CO sessions, the chairs read the book *Simply Managing* by Henry Mintzberg and discussed the concepts at the start of each CO session. Additional coaching and resources were provided so people could advance their individual learning and development. Some of the chairs also used these supports with their respective teams and reported on this during the Management Happenings (debriefing) portion of the CO session.

Finally, a critical element of the program was evaluating the process. The evaluation focused on alignment, leadership, actions, and impact (Figure 8).

Figure 8 Evaluation Framework for Leading, Managing, and Inspiring Healthy Community



The evaluations consisted of several elements. In addition to the content from the Management Happenings and feedback received at the end of each CO session, we administered an online survey at the end of the third CO session. The survey was designed to assess the participants' satisfaction with the CO topics and process, and the growth of

the team's change leadership competencies and progress toward the program objectives. We also asked open-ended questions to assess their top three takeaways and recommendations for improvement. The results were used to inform the team's next steps.

As the figure represents, the leadership group's goal was to develop a shared vision and meaning of what it is to lead, manage, and inspire a healthy community in HHS. The results revealed that, in terms of leadership, the participants were very grateful for the learning experience and approach. The process, tools, and resources were relevant for their work (alignment) and a good investment for them as individual leaders, as the HHS leadership group, and for their teams.

In regards to impact, in terms of developing their change leadership competencies, team members said that they were still developing skills and would like more clarity on the direction for their department going forward. They agreed they wanted to continue developing as a leadership group. At the same time, they felt that they were equipped with effective practices, tools, and supports for their own learning and development. They wanted more support in developing strategies to lead and manage change in their department and within the school, given the move to the new campus.

On that basis, for actions, the leadership team decided to add the Experiencing Change Workshop, which included the ExperienceChange simulation described earlier, an overview of wise practices, and a toolkit to lead and manage change. They included program leaders from all HHS programs in this workshop. The leadership team also expressed a desire to expand CO courses to their program leaders and continue the process as a leadership group. They were fully engaged in the change process.

By the end of the program, and based on the results, the leadership group began working on the next phase, which would focus on cascading the CO process to the

program leaders. They also designed a train-the-trainer process to assist them in leading and managing this process in their respective programs.

This case study shows how a CO program strongly reinforces the elements of the LMC Framework and Process. The CO courses helped the leadership group reflect on their shared experiences, strengthened their ability to work together as a senior leadership team, and gave them concepts and tools that helped them create a shared mindset and advance their leadership and management practices so they could lead meaningful change for HHS.

→ **Case Study: Using the LMC Framework and Process in a Small Not-for-Profit**

The principles and practices of the LMC Process can also be self-taught and used to build teams in small organizations and on short-term projects. To illustrate this, I would like to share a case study dealing with a not-for-profit theater group. While this example takes place in a non-corporate business environment, it serves as an example of how not-for-profit organizations can equally use the concepts and tools of this book in their work.

The case begins with an actor, Steve Walters, who had a germ of an idea for a play based on the musical *Camelot*, but told in pantomime—thus he called it *Camelot the Panto*. Steve did not originally consider himself a director, but he knew he needed a team effort to make the play happen. He began by approaching two experienced directors to talk about his idea, only to discover that they had no interest in the play. Disappointed, he hesitated. Something held him back. For many years he had acted in the community theater, but he had no experience directing.

But then one day, by chance, he was in the theater and saw the executive director walking toward him. He had chills as he told the executive director his idea. There was a lull in the conversation, but then they both said