FOUNDATION IN MANAGEMENT AND LEADERSHIP

A MULTI-METHOD EVALUATION

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Executive Summary

Background

- This report presents a multi-method evaluation of feedback from the inaugural cohort (2012-2013) of Cumbria PFT's Foundation in Leadership and Management programme (FIM).
- The FIM was developed through a preparatory working group, including staff and managers, to identify and target specific needs which were then cross referenced with national accredited tools such as the leadership competency framework and NHS change model.
- The first participating cohort was large and highly diverse in role and grade, which is an issue reflected in feedback throughout.

Methodology

- Four different data-forms were collected to provide a multi-dimensional evaluation; these were:
  - The participants' evaluations of FIM sessions (quantitative and qualitative);
  - Two tranches of interviews with participants during and after FIM (qualitative);
  - Interviews with the managers of participants after FIM (qualitative);
  - A pre- and post-initiative survey exploring FIM participants' self-ratings on a range of key leadership skill indicators.

Results I: Session Evaluations

- Systematic analysis of **N=360** evaluation forms collected from FIM participants after taught session yielded a wide range of qualitative and quantitative findings pertinent to each of the five days of the programme.
- Quantitatively, the overall mean satisfaction rating for FIM (i.e. taking into account all participant scores for all criteria at all sites on all days) is a very impressive **88.30%**.
- Participants identified a number of themes they would take home from Day 1, not least the need to think holistically about leadership within the trust, the need to plan effectively and the value of proactivity.

- Following Day 1, participants reported increased confidence around their roles and a greater ease around the notion of upper-management.
- Following Day 2, participants reported feeling more self-aware, confident and assertive as a result of what they had learned, and expected to be more reflective in their roles, and readier to delegate.
- Following Day 3, Participants reported feeling more confidence to challenge "common knowledge" in the working world, a greater comfort with CPFT's structures and organisation, more basic confidence in their own role and a decreased anxiety level around organising budgets and finances.
- Following Day 4, participants reported feeling more motivated around their roles following involvement in the day, more confident about future interactions with the people they manage, less afraid of conflict and more enthusiastic about the future changes in CPFT.
- Following Day 5, Participants reported that they felt better equipped to cope with change, motivated to try out the new tools with which they had been equipped, more confident as leaders in general and that their capacity for empathy and understanding had been enhanced.

Participant interview findings

- Systematic analysis of **N=10** interviews with FIM participants yielded six global themes: (a) training content, (b) training organisation, (c) extant workplace impacts and constraints, (d) projected workplace impacts and constraints, (e) extant personal impacts, and (f) hopes and fears.
- Participants reported strong knowledge-transfer and the sharing of best-practice within the FIM cohort itself. Participants reported having engineered new links across CPFT itself as a direct result of their work within FIM.
- In terms of direct workplace impacts, new (team)working strategies and had been brought about following absorption of FIM materials.
- Stronger empathy with others, and consequently more confident capacities for communication and the management of conflict, were reported.
- Better understandings of budget situations and management were also a recurrent theme.
- Participants reported a much stronger sense of the Trust's structures, and also a much better understanding of their own place within it.

- In terms of participant upskilling, meanwhile, stronger capacity for listening was recurrently noted by participants. Better capacity to deal with stress was also reported, as were improved time and workload management skills.
- A better understanding of leadership styles and techniques (and especially the use of the MBTI) effected a more generally skilled, sensitive and above all confident approach to leading teams.
- A greater confidence (even faith) in the Trust and its vision/directions was reported as an output of FIM, and particularly the first day thereof. Greater *self*-confidence was also reported by several participants.
- Connected closely to confidence for FIM participants was the issue of positivity, particularly that about their own future and that of the trust.
- A number of participants reported a FIM-driven movement towards a more realistic and reflective working self; in short, they adopted a more careful, structured and inclusive approach to their role and interactions with others.
- This awareness was also responsible for fostering worries in three areas: (a) a stronger understanding of the weight of expectation upon leaders, (b) knowing "how little you actually know" about management and leadership and (c) coming to understand the sheer range of personality types, and personal needs, within any team.
- Several participants reported a newly-found enthusiasm for learning, which would translate into more engagement with materials from FIM itself, or engagement with new training programmes.
- Participants reported sustained hope that greater understanding and cooperation would be fostered within and between teams.

Managerial interview findings

- Systematic analysis of **N=3** interviews with managers of FIM participants yielded three global themes: (a) FIM expectations, (b) FIM impacts, and (c) FIM novelties.
- In terms of the impacts actively resultant of FIM, managers observed a wide range thereof in two primary domains: (a) personal impacts (i.e. dispositional changes and upskilling), and (b) strategic impacts (i.e. differences made in the workplace itself).
- All of the more dispositionally-oriented impacts that managers had previously anticipated regarding FIM were reported as manifest in their post-FIM observations, as were some additional unforeseen benefits.
    - Participants were reported to have become more socially confident and self-confident, and to be showing greater interpersonal authority.

    - Personal empowerment and development were also noted to have manifested in capacity for professional autonomy.
- On the strategic side of things, impacts were reported in four distinct areas:
    - Participants' had enhanced capacity to work systematically and transparently at the top of a team.
    - Participants were now more skilled in the related fields of strategic communication and organisation within their teams.
    - Participants were more advanced and reliable in budgetary management.
    - Participants exhibited a broad improvement in awareness of institutional context.

Participant survey findings

- Two tranches of survey data were collected, one at the very beginning of FIM (**N=88** participants) and another (mirror) tranche after its completion (**N=62** participants), to facilitate assessment of longitudinal change.
- Participants were asked to self-rate in terms of confidence, assertiveness, communication skills, openness, resource management skills, personal satisfaction, conflict-management, positivity in self-image and positivity in how one is seen by others.
- Workplace-based assertiveness, communication skills, personal satisfaction, conflict management, positivity in self-image and positivity in how one is seen by others all improved across the course of FIM.
- A statistically significant shift in capacity to balance managerial and operational aspect of role took place during the course of FIM. A substantially greater proportion of the participant sample (79.19%) achieved this balance post-FIM than did so beforehand (57.95%).
- Participants were also asked to rate their knowledge and understanding of CPFT's organisational structure pre- and post-FIM. Areas investigated were (a) understanding of services within CPFT, (b) understanding of quality performance measures used within CPFT, and (c) understanding of CPFT's organisational vision, strategy and business plans.
- There was a significant difference between clinical and staff and non-clinical staff, with the latter rating their knowledge in all three domains more highly.
- Post-FIM ratings increased significantly in all three domains. In terms of knowledge of services within CPFT, the mean self-rating rose to 7.19; a relative increase of very nearly 20%. Knowledge of measures and organisational vision, meanwhile, show relative improvements of an even greater order (22.4% and 28.3% respectively).

- The gap between clinical and non-clinical staff had closed.

Conclusions

- Reviewing the manifest aims FIM and the evaluation impact data, it is clear that – insofar as the form of this evaluation can measure – the programme has either achieved, or is well on the way to achieving, all of them. Moreover, there has been a secondary raft of latent impacts evidenced from the qualitative data and elucidated above, which are equally worthy of celebration.
- The conclusion explores reflections of the training, plus four cross-cutting meta-themes that consistently appear in all four forms of data collected. These are:
    1. Institution, knowledge and networks;
    2. Personalities, empathy and the MBTI;
    3. Communication and conflict-management, and;
    4. Confidence, motivation and optimism.

Acknowledgement

This evaluation was commissioned and funded by the Cumbria Partnership Foundation Trust.

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1. Introduction

The Foundation in Management and Leadership (FIM) programme was developed from a strong evidence-base within CPFT "…to build the foundations of effective management by setting the context of the organisation, providing essential practical skills, knowledge and behaviours…" (Cumbria PFT, 2012, p.3) requisite for the performance of day-to-day operational roles.

1.1. The programme

The FIM was developed through a preparatory working group, including staff and managers, to identify and target specific needs which were then cross referenced with national accredited tools such as the leadership competency framework and NHS change model. Combining theoretical perspectives, practical organisational knowledge and structured reflective learning, the overall stated aims of the programme were to imbue participants with:

- Understanding of the scope of the CPFT;
- Understanding of the vision and values of CPFT, and how these apply to particular service areas and roles;
- A developing knowledge of, and practical essential skills in, the undertaking of operational roles;
- A broad perspective upon leadership approaches to encourage self- and team- development.

Specifically designed, thus, to provide insight into participants' leadership styles, and to provide opportunity for participants to develop confidence in management and team-working, the programme comprised an introductory day followed by four sequentially-ordered modules:

1. Understanding the organisational context;
2. Self-awareness and leading for professional and personal growth;
3. Service quality and performance;
4. Practical management of teams.

Consequently, the intended outcomes for participants were stated as (Cumbria PFT, 2012, p.4):

- "Knowledge and practical skills to undertake your operational management role with greater confidence;
- Insight into your leadership style and the impact of behaviours on your team and colleagues;
- Development of self-awareness;
- A deeper understanding of quality and performance measures and why they are needed to build a successful health care organisation;
- Clarity of your role and influence within the service and wider organisation."

1.2. Multi-site delivery

While there was a single introductory day for all participants, the remaining four days of the FIM programme were replicated across six different sites for the convenience of participants (who were widely distributed around Cumbria itself). These were:

- Allerdale;
- Carlisle;
- Copeland
- Eden;
- Furness;
- South Lakes.

Analysis in this evaluation thus takes account of the fact that each day of the delivered programme after the introductory day is, in real terms, six different days of actual delivery.

1.3. Report structure

The remainder of this report is organised into the following sections:

- The **methodology** outlined the data handling and analysis methods employed in the execution of the evaluation.

- **Findings I** reports outcomes from the participants' evaluations of the taught sessions.
- **Findings II** reports outcomes from two tranches of interviews with FIM participants, addressing both the programme and the change projects.
- **Findings III** reports outcomes from interviews with the managers of FIM participants, addressing both the programme and the change projects.
- **Findings IV** reports outcomes from pre- and post-initiative surveys exploring FIM participants' self-ratings on a range of key leadership skill indicators.
- The **impact analysis** juxtaposes all key impact-related findings from the four prior sections, and synthesises key aspects thereof.
- The **conclusion** explores key cross-cutting themes appearing throughout the evaluation.

2. Methodology

This report employs a mixed-analytic approach to the evaluation data collected. Four different data-forms were collected to provide a multi-dimensional evaluation; these were:

- The participants' evaluations of FIM sessions (quantitative and qualitative);
- Two tranches of interviews with participants during and after FIM (qualitative);
- Interviews with the managers of participants after FIM (qualitative);
- A pre- and post-initiative survey exploring FIM participants' self-ratings on a range of key leadership skill indicators.

2.1. Session evaluations

All participants at all sessions of the FIM programme were invited to provide evaluative feedback on the sessions in which they participated.

2.1.1. Participants

The total number of evaluations received was **N=390**. This was broken down as follows:

- On Day 1, **n=65** evaluations were collected;
- On Day 2, **n=89** evaluations were collected across the six locations;
- On Day 3, **n=74** evaluations were collected across the six locations;
- On Day 4, **n=82** evaluations were collected across the six locations, and;
- On Day 5, **n=80** were collected across the six locations.

2.1.2. Evaluation design

The evaluation form (see Appendix 6) was organised to generate two key forms of feedback data. The quantitative aspect utilised five standard Likert scales requesting the following information:

1. Did you find the sessions informative?
   (Not at all) 1 2 3 4 5 (Definitely)
2. Did you find the course materials relevant?
   (Not at all) 1 2 3 4 5 (Definitely)
3. Do you feel clear on the programme session objectives?
   (Poor) 1 2 3 4 5 (Excellent)
4. The quality of facilitation and general manner when dealing with the group was…
   (Poor) 1 2 3 4 5 (Excellent)
5. Did you find the environment suitable and conducive to learning?
   (Not at all) 1 2 3 4 5 (Definitely)

The second availed participants of an opportunity to provide more detailed qualitative data in line with the following requests:

6. How relevant do you feel that this training has been in relation to your current job role?
7. Do you feel that the level of the content was appropriate, if not what would you suggest?
8. Can you identify at least one thing that you will take away from this day? (You can include more than one if you wish to)
9. Is there anything else that you would have liked to have seen included in the day?

Finally, space was provided for participants to provide any additional information they saw as relevant.

2.1.3. Data analysis

Likert scale data were analysed descriptively by question and Day-of-collection, and then comparatively to explore differences between feedback on different days and locations. A Straussian

Grounded Theory approach (Strauss and Corbin, 1998) was used to investigate qualitative contributions, in which responses were initially free-coded, and then grouped into sub-themes and meta-themes. Finally, these meta-themes were collected into common evaluative categories.

It is essential to keep in mind that this latter mode of thematic analysis is designed to display the *range* of themes emergent of the qualitative data, and not accord significance according to frequency of occurrence. From a Straussian point of view, every issue has potential ramifications and it would be myopic to dismiss an innovative idea or suggestion because it is less statistically significant. Indeed, innovation itself is often defined by the fact that it is not widely posited. All key findings are presented in Section 3 of this report.

2.2. Participant interviews

Semi-structured interviews with a sample of participants in the FIM programme were conducted.

2.2.1. Participants

The set of interviews (**N=10** participants) took place around two thirds of the way through the taught programme. Participants were purposively sampled (see Silverman, 2010) to provide a strong cross-section of the different roles and grades in the wider base of participants.

2.2.2. Design

Semi-structured (or 'focused') interviews are organised around a series of central broad and open questions, with subsidiary topical 'prompts', rather than a rigid set of pre-defined inquiries.

> '...the interviewer asks major questions the same way each time, but is free to alter their sequence and probe for more information. The interviewer can thus adapt the research instrument... [to] handle the fact that in responding to a question, people often also provide answers to questions [they] were going to ask later.' (Fielding and Thomas, 2008, pp.246-247)

The core strengths of this technique in qualitative research are three fold:

1. Lateral comparability of findings is still fully achievable across respondents, but:
2. The respondent is also given the discursive space to voice ideas and thoughts that might not have been strictly specified within the exact question; i.e. there is room for new and potentially novel themes to arise.
3. The respondent can connect topics and concepts in their own way, providing a sense of how they themselves understand the 'bigger picture', rather than being beholden to a structure that demands they (a) may have to repeat things they have already said, and/or (b) may have to answer questions in a sequence that does not seem logical to them – both of which can often 'frustrate and annoy' respondents (Suchman and Jordan, 1990).

Semi-structured questioning thus focused around the following central issues:

1. The participants' feeling and experiences of the training;
2. The expected/experienced impacts of the training;
3. Expected or experienced obstacles to such impacts;
4. Means for surmounting obstacles;
5. Changes in attitude towards management and/or leadership roles as an output of participation in the FIM programme;
6. Workplace challenges that participants may be more aware of, or sensitive to, as an output of participation in the FIM programme.

The interview schedule can be found in Appendix 4. Each interview was anticipated to take between 20 and 30 minutes in total, though some were longer and some shorter contingent on the level of detail the respondent provided. Sound files from all interviews were transcribed verbatim, but are presented in this report with necessary deletions for clarity of reading wherever practically possible. These deletions are:

1. 'Minimal continuers' (Hutchby and Wooffitt, 1998), such as 'uhm', 'erm' and 'err'.
2. Word repetitions and stutters.
3. Aborted or reformulated sentence starts.
4. Linguistic idiosyncrasies, such as 'you know', 'kind of like' and 'sort of'.

All data were transcribed and prepared for analysis by mid-June 2013; data analysis then proceeded as outlined in section 2.2.3 (below).

2.2.3. Analysis

Data were explored for patterns and themes using many of the general principles of Grounded Theory (Glaser and Strauss, 1967), and within Scientific Software's ATLAS.Ti qualitative analysis package. Grounded Theory, in its simplest terms, is:

> '...the discovery of theory from data systematically obtained from social research.' (Glaser and Strauss, 1967, p. 2).

This analytic stance, thus, represents the endeavour to generate robust and defensible, practice-oriented findings from rigorous qualitative analysis of a single data-set. Evaluative strategy herein involves two central analytic steps geared towards ongoing category-refinement, as displayed in Table 1:

TABLE 1: ANALYTIC STEPS IN GROUNDED THEORY

Step.	Activity.
1. 'Open' Coding.	The initial classification and labeling of concepts in qualitative data analysis. Themes are discovered through careful examination and questioning of the data.
2. 'Axial' Coding.	The reanalysis of the results of step 1, aimed at identifying the important, general concepts.

With respect to step 1, within the data corpus collected the themes identified closely mirror those outlined as priority issues in Section 1, due to the manner in which interview schedules were specified. This phase of analysis is illustrated and evidenced in Section 4.1 and 4.2. Outcomes of the

second stages of analysis, aimed at finding core patterns and tendencies in the full corpus of collected data, are detailed in Section 4.3.

2.3. Management interviews

Semi-structured interviews with a sample of the managers of participants in the FIM programme were conducted three months subsequent to the end of the programme itself.

2.3.1. Participants

A total of **N=3** managers were purposively sampled to maximise variety, and interviewed about their own experiences regarding the relevant FIM participant.

2.3.2. Design

Semi-structured questioning focused around the following central issues:

1. Their initial hopes and expectations for the personal development of the participant in the FIM programme as an outcome of their participation;
2. The impacts that the FIM programme has had on the participant's own personal and professional development (if any);
3. The impacts that the FIM programme has had on the participant's workplace (if any);
4. Their own views on the differences between the FIM programme and prior initiatives of that ilk.

The full interview schedule for the management interviews can be found in Appendix 5. Each interview was anticipated to take between 15 and 20 minutes in total, though some were longer and some shorter contingent on the level of detail the respondent provided. All data were transcribed and prepared for analysis by mid-August 2013.

2.3.3. Analysis

Data were again explored for patterns and themes using many of the general principles of Grounded Theory (Glaser and Strauss, 1967), and within Scientific Software's ATLAS.Ti qualitative analysis package.

2.4. Participant surveys

An online survey, using the Bristol Online Surveys (henceforth BOS) system, was designed to provide an initial and post-hoc analysis of the demographic characteristics and self-evaluations of the participating cohort, and thereby to monitor change and impact over the duration of FIM itself.

2.4.1. Participants

Two tranches of survey data were collected, one at the very beginning of FIM (**N=88** participants) and another (mirror) tranche after its completion (**N=62** participants), to facilitate assessment of longitudinal change.

2.4.2. Survey design

The survey[1] was designed to account for three key issues:

1. The specific information required by CPFT itself.
2. The need to produce comparable, longitudinal data across two survey tranches (per-FIM and post-FIM).
3. The core methodological imperatives outlined in prior survey work on management and leadership, most notably those arising from the established Multifactorial Leadership Questionnaire (see Bass and Riggio, 2006).

[1] For the full structure and set of questions, refer to Appendix 2.

As such, an inventory of 57 questions, in a five-section format, was employed to explore the following major themes:

- Participants' demographic details and role outlines.
- Participants' self-evaluation of pertinent managerial skills and knowledge in general life settings.
- Participants' knowledge of CPFT's organisational structures and vision.
- Participants' self-evaluations of their specific skills in managing, and being managed, in their NHS role.
- Participants' overall appraisals of themselves as managers within the NHS, and of the programme itself.

The 48 evaluative questions were measured using ten-point Likert scales to assess levels of agreement with given statements, and ten-point rating scales on which participants could provide assessments of their own levels of skill or knowledge in given fields. Ten-point scales were preferred to more familiar five-point models in order to provide greater sensitivity of measurement in subsequent analysis of longitudinal change (De Vaus, 2002).

2.4.3. Survey procedure

The survey was designed in draft form, evaluated by an experienced statistician for consistency and also by partners at CPFT for institutional practicality. Adaptations were made and the survey was then inputted to BOS, and rendered live once at the very beginning of FIM, and once after it had finished its run. All participants were invited to complete the survey on each occasion via email link to the site, with relevant assurances of personal anonymity rendered explicit throughout. Data were exported into SPSS 19.0, which was then used for all statistical analyses.

2.4.4. Data analysis

A full suite of descriptive statistics was initially run on each individual question and, following consideration of the data, post-coding was executed on three variables to facilitate statistical

analysis. Number of years working for the NHS was grouped into 1-10 years, 11-20 years, 21-30 years and more than 30 years. Number of years working in a managerial position was grouped in to greater or less than 10 years. Number of people currently managed was grouped in to 1-10 people, 11-20 people, 21-30 people and greater than 30 people.

Eleven basic analytic categories - assertiveness, confidence, communication, listening, numeracy, time management, conflict-management, comfort with change, team-playing, independent decision-making and respect of authority were derived from direct and combined ratings of 'general' skills, attitudes and knowledge. Nine analytic categories (shown in Table 1, below) were derived from compounds of variables describing a range of pertinent practices at work[2].

TABLE 2: ANALYTIC CATEGORIES USED IN SURVEY

Analytic Category	Description
1. Assertiveness	Capacity to be assertive with others.
2. Confidence	Faith in own ability to execute tasks effectively.
3. Openness	Capacity to respect and listen to others.
4. Communication	Outcomes from effective communication with others.
5. Resource Management	Capacity to utilise time, money and information effectively.
6. Satisfaction	General comfort with status quo.
7. Conflict management	Capacity to negate or deal with conflict.
8. Self-Positivity	Contentment with performance.
9. Other-Positivity	Positive view of how self is seen by others.

[2] E.g. 'Role Openness' being formed out of combined results from four questions on capacity to listen, and given/received respect. See Appendix 3 for a full breakdown of the responses used in the formation of compound role categories.

'General' categories were then recombined for comparison with those nine specifically manifesting within workplace environments to assess whether participants viewed themselves as, for example, more or less assertive in their broader lives than in their professional roles, and how these issues vary according to gender, experience, role factors and so forth.

Finally, the results of the two surveys were compared to each other to assess impact across the duration of FIM. All findings are reported in Section 6 of this report.

3. Results I: Session Evaluations

In this section, quantitative feedback from the FIM sessions is analysed by day and by site (3.1) and then across-variables (3.2), qualitative feedback is summarised (3.3) and a final set of principles is finally extracted from the full body of data (3.4).

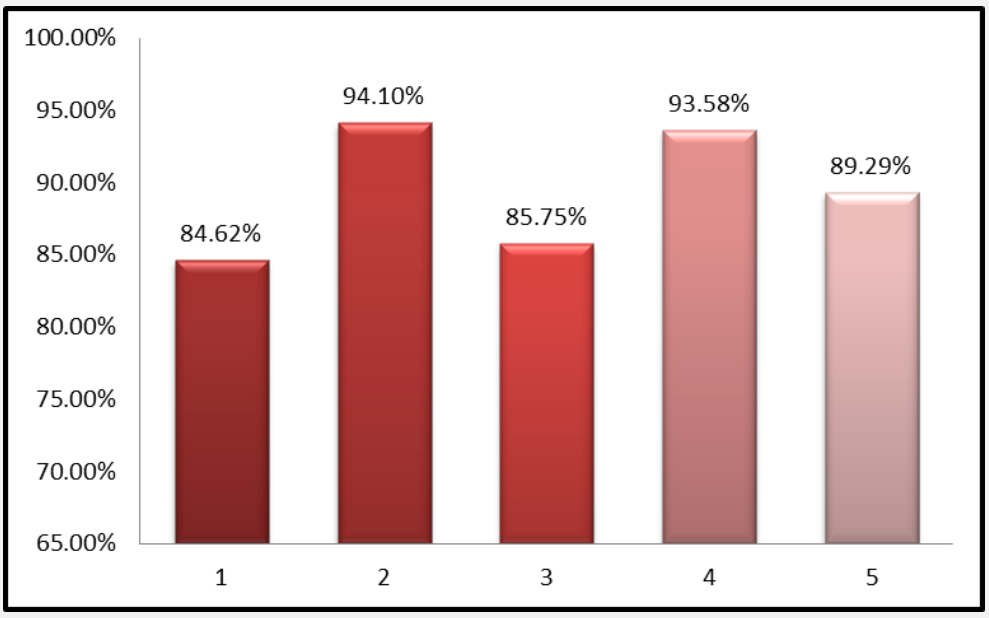
3.1. Quantitative feedback: site and day analyses

Firstly, in 3.1.1, the mean feedback across all sites is explored by-day in terms of five key evaluative criteria: (a) session informativeness, (b) relevance of materials, (c) clarity of objectives, (d) quality of facilitation and (e) quality of learning environment. Then, in 3.2.2, the mean feedback across all days is explored by-site in terms of those same criteria.

3.1.1. Satisfaction by day

Participant ratings of how informative sessions they found sessions are shown in Figure 1.

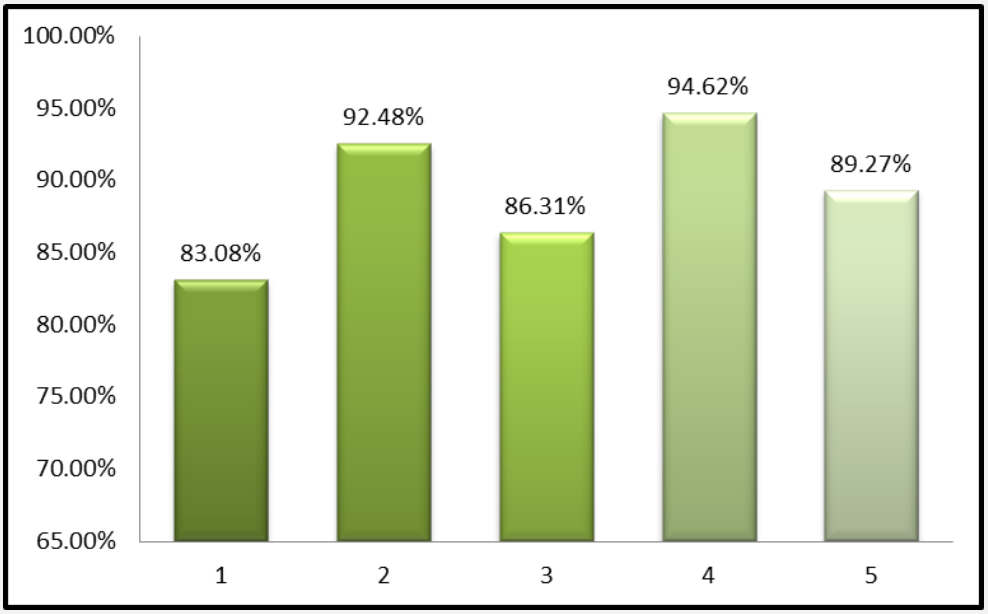
FIGURE 1: INFORMATIVENESS OF SESSIONS, BY DAY



It is clear, herein, that Days 2 ("Understanding the Organisational Context") and 4 ("Service Quality and Performance") were seen as the most informative, both achieving an overall satisfaction rating in excess of 90%, though all days were strongly rated (at over 80%) in this domain.

Participant ratings for the relevance of materials on each day followed a similar pattern, as evidenced by Figure 2.

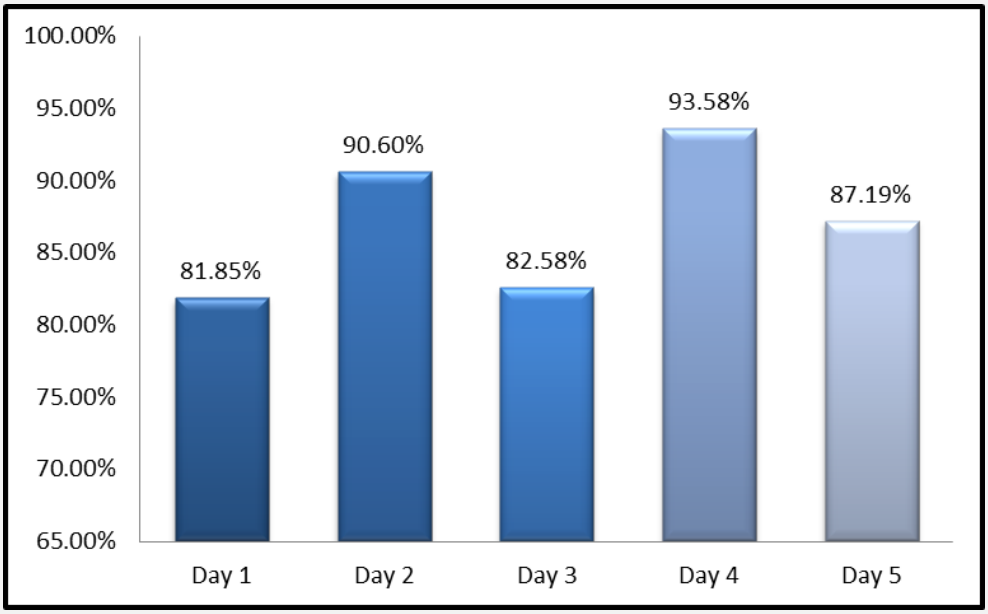
FIGURE 2: RELEVANCE OF MATERIALS, BY DAY



Again, Days 2 and 4 were the most highly rated, with the introductory day receiving the lowest mean rating. All mean scores for relevance, however, including those for the introductory day were still in excess of a very healthy 80% satisfaction.

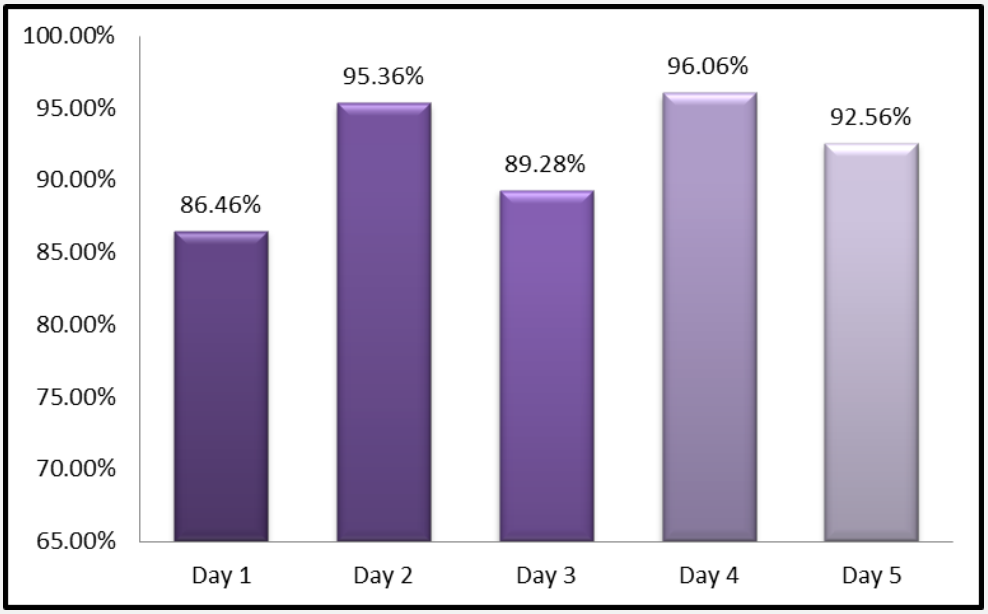
This broad trend is sustained when considering participant feedback and the clarity of objectives for each day of the FIM programme. Although the overall ratings are very slightly lower than those for the previous two criteria, Days 2 and 4 are once again scored at over 90%, and all days are scored at over 80% (see Figure 3).

FIGURE 3: CLARITY OF OBJECTIVES, BY DAY



Participant satisfaction with session facilitation in FIM, meanwhile, is shown in Figure 4.

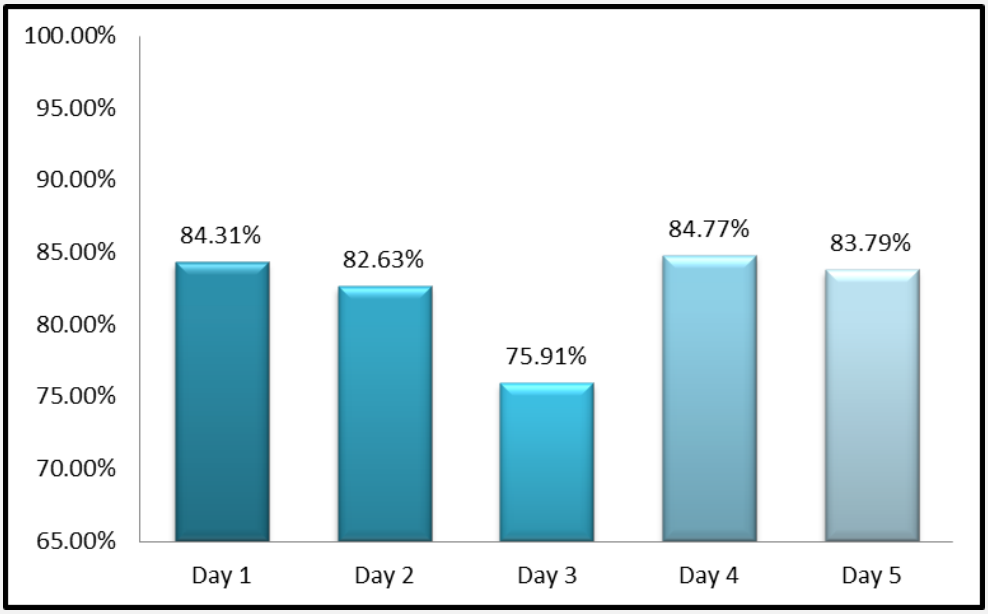
FIGURE 4: QUALITY OF FACILITATION, BY DAY



It is evident from this data that, for the participants, facilitation was one of the programme's greatest strengths. Days 2, 4 and 5 ("Practical Management of Teams") were all rated at above 90%, Day 3 ("Self-Awareness and Leading for Professional and Personal Growth") fell only very marginally short of 90%, and Day1, which featured more direct "teaching" and less interaction than the other days, still achieved a satisfaction rating in excess of 85%.

Quality of learning environment, on the other hand, was the least highly rated aspect of the programme, though the mean scores for all days still exceed 75%, with Days 1, 2, 4 and 5 actually in the 80%-85% range. While the outcomes displayed in Figure 5 illustrate this comparison with the other evaluative criteria *in general*, interpretation of this particular breakdown should be approached with caution due to the multi-site delivery for days 2-5.

FIGURE 5: QUALITY OF LEARNING ENVIRONMENT, BY DAY



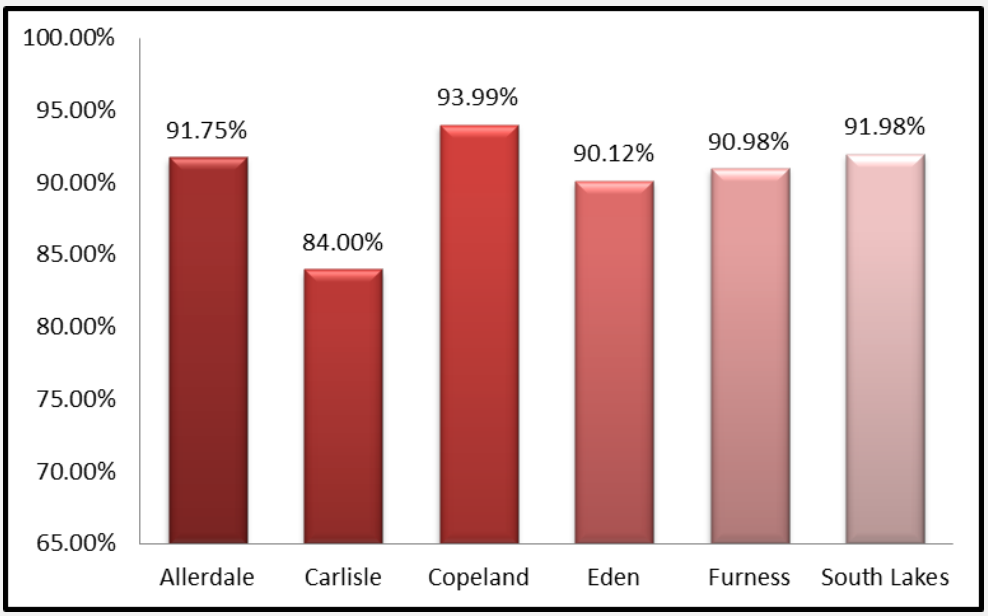
3.1.2. Satisfaction by site

When exploring the data corpus by-site, one should expect fewer fluctuations in the data for all criteria except learning environment. This is because the exact same sessions were delivered at all sites and, thus, such criteria as usefulness, relevance and so forth should be consistent. In practice, of course, this is rarely the case. Small variations in the composition of the audience can substantially

affect what is generally understood to be "useful" (or "relevant"). A room full purely of clinical staff is likely to have at least a slightly different concept of job-relevance to a purely non-clinical group. Moreover, inevitable variations in the learning environment, or the group dynamic, between sites can also affect the overall learning experience significantly. One should further be mindful that, with the FIM group divided into six subgroups, the population for each site is much smaller, and therefore data is more clearly subject to the foibles of individuals. A single dissatisfied individual in a group of 8 will affect the group mean far more extensively than they would in a group of 80.

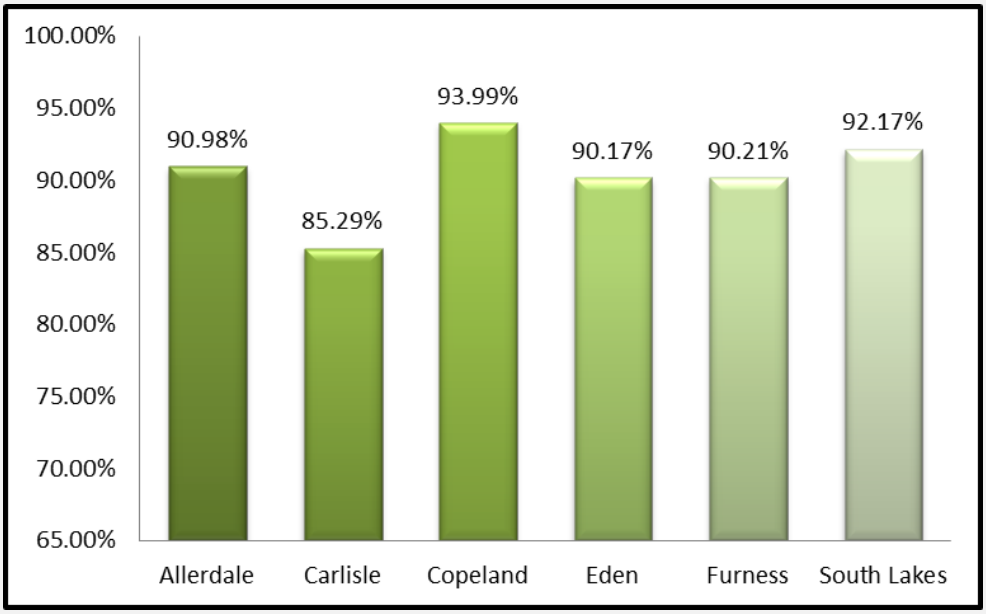
With this in mind, however, what is perhaps most noteworthy about the data shown in Figure 6 is just how stable the ratings *are* across sites. With the exception of those from Carlisle (84.00%), all mean ratings for usefulness of sessions rank between 90% and 94%, with Copeland performing most strongly at 93.99%.

FIGURE 6: INFORMATIVENESS OF SESSIONS, BY LOCATION



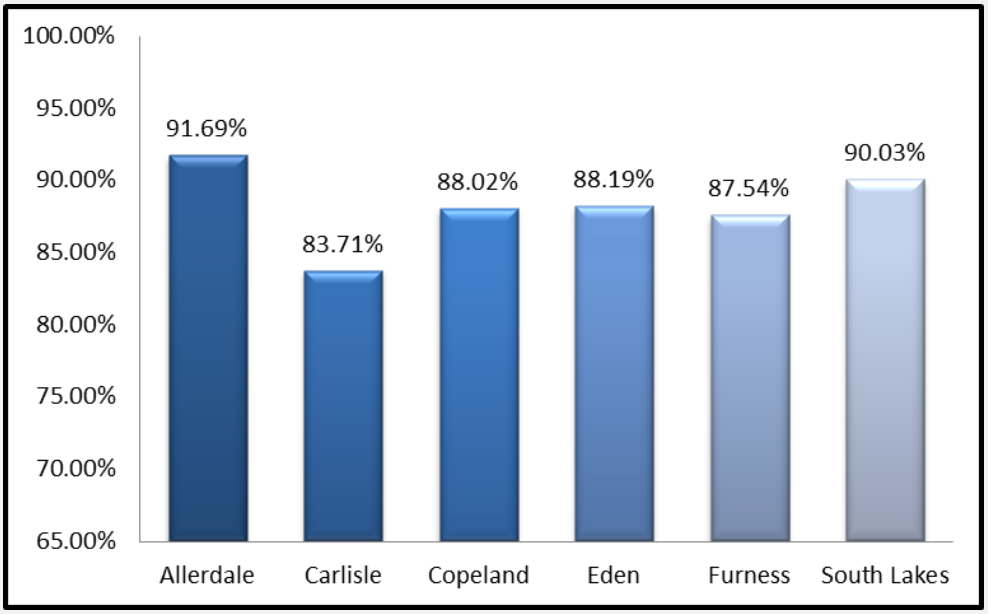
The participant ratings for relevance follow a very similar pattern (see Figure 7); Carlisle again scores in the mid-80% range, while ratings for all other sites vary between 90% and 94% (with Copeland again the highest ranked).

FIGURE 7: RELEVANCE OF MATERIALS, BY LOCATION



Consistency of delivery between sites is again apparent in the ratings for clarity of objectives which, although marginally lower than those for usefulness and relevance, are still all in excess of a healthy 80% (see Figure 8).

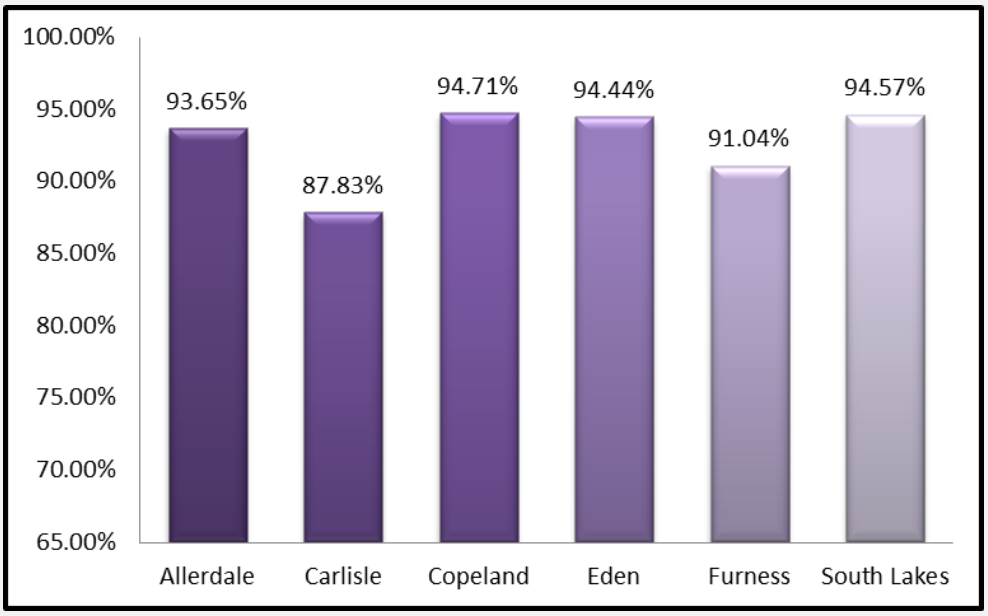
FIGURE 8: CLARITY OF OBJECTIVES, BY LOCATION



In terms of clarity, Allerdale (91.69%) and South Lakes (90.3%) this time score most strongly, with participants again scoring Carlisle a little lower (though relatively less so than with previous criteria).

As noted in section 3.1.1, facilitation quality was quantitatively the most well-received aspect of the FIM programme, and the distribution of rankings by site show minimal variation in this domain (Figure 9).

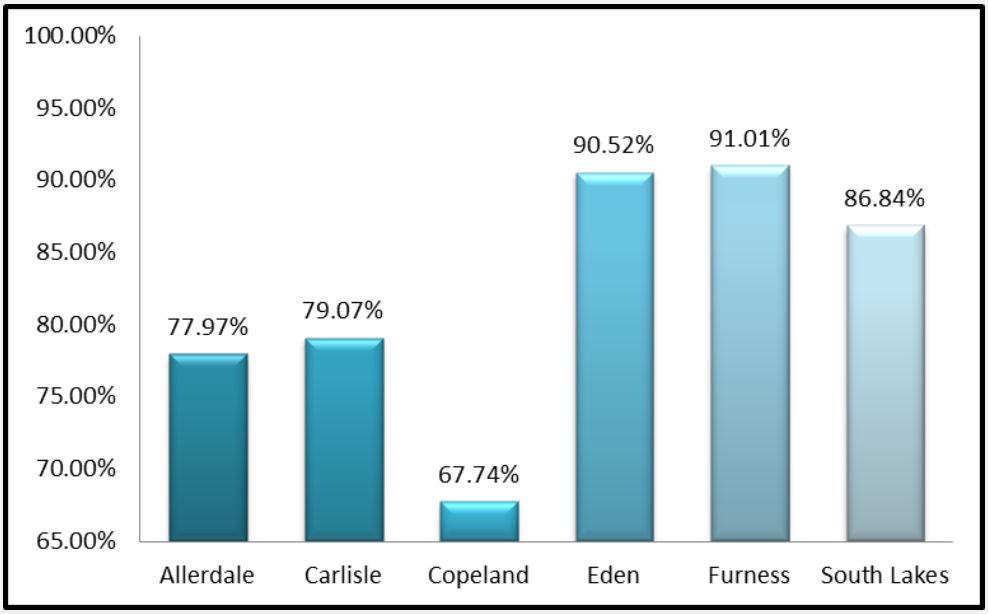
FIGURE 9: QUALITY OF FACILITATION, BY LOCATION



Participants at Allerdale, Copeland, Eden and South Lakes all ranked the facilitation of sessions at between 93.5% and 95%. Participants at Furness ranked the facilitation marginally lower, but still in excess of 90%, and Carlisle-based participants allocated their highest mean ranking for any of the criteria (87.83%).

As noted at the beginning of this section, it is reasonable to expect that ratings for learning environment might vary quite substantially between sites, and this is abundantly evident in Figure 10. Ratings for this criterion vary between a very strong 91.01% at Furness, to a rather less satisfactory 67.74% at Copeland. The environments at Eden and South Lakes received mean ratings in excess of 85%, while those at Allerdale and Carlisle were ranked in the high 70% zone.

FIGURE 10: QUALITY OF LEARNING ENVIRONMENT, BY LOCATION



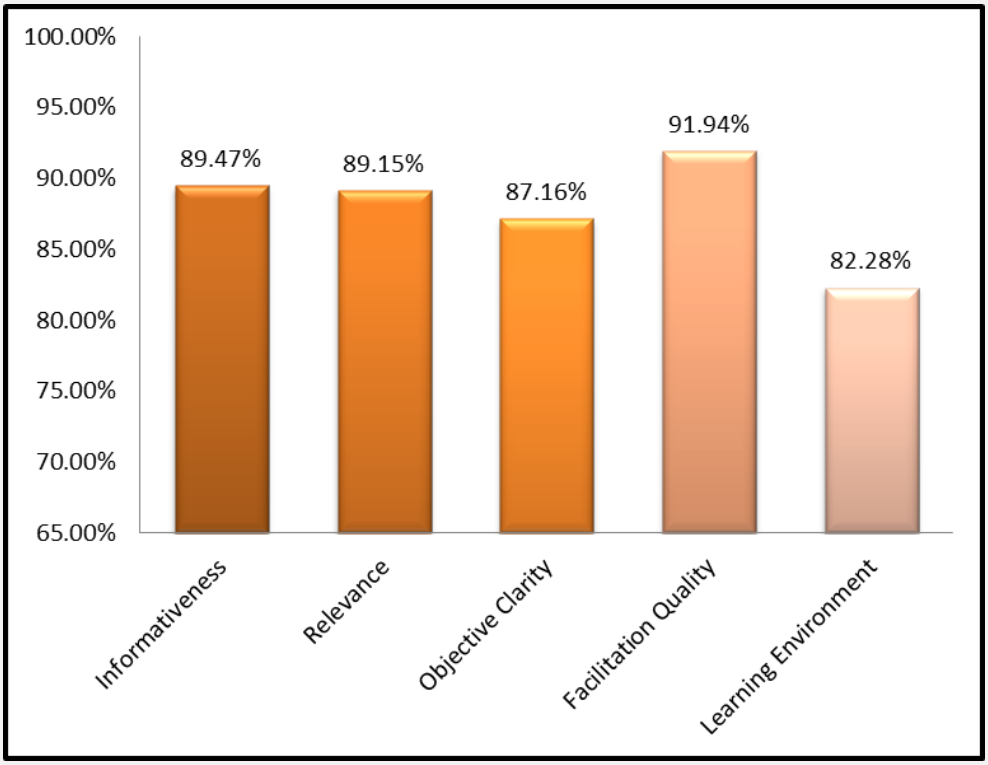
What is, perhaps, most surprising in this respect is that Copeland, despite being ranked over 20% less favourably by participants on learning environment than either Furness or South Lakes, consistently outscored them both on most other criteria. Carlisle, meanwhile, scored lowest of the six sites on all other criteria, but better than Allerdale or Copeland on learning environment. This indicates that, in these cases at least, the link between learning environment and satisfaction with the learning itself is not determinate. This matter is discussed at greater length in section 3.2.

3.2. Quantitative feedback: combined analyses

With the statistics above to hand, it is now possible to explore some more general trends across the full quantitative data corpus. Firstly, the overall mean satisfaction rating for FIM (i.e. taking into account all participant scores for all criteria at all sites on all days) is a very impressive **88.30%**.

Secondly, comparing the overall approval ratings for each evaluative criterion, it is clear that the quality of facilitation was the aspect of FIM most appreciated by participants (a mean rating of 91.94%) while, in terms of being informative, relevant and having clear objectives, mean scores in the very high 80% range were achieved (see Figure 11).

FIGURE 11: OVERALL APPROVAL RATINGS, BY CRITERION



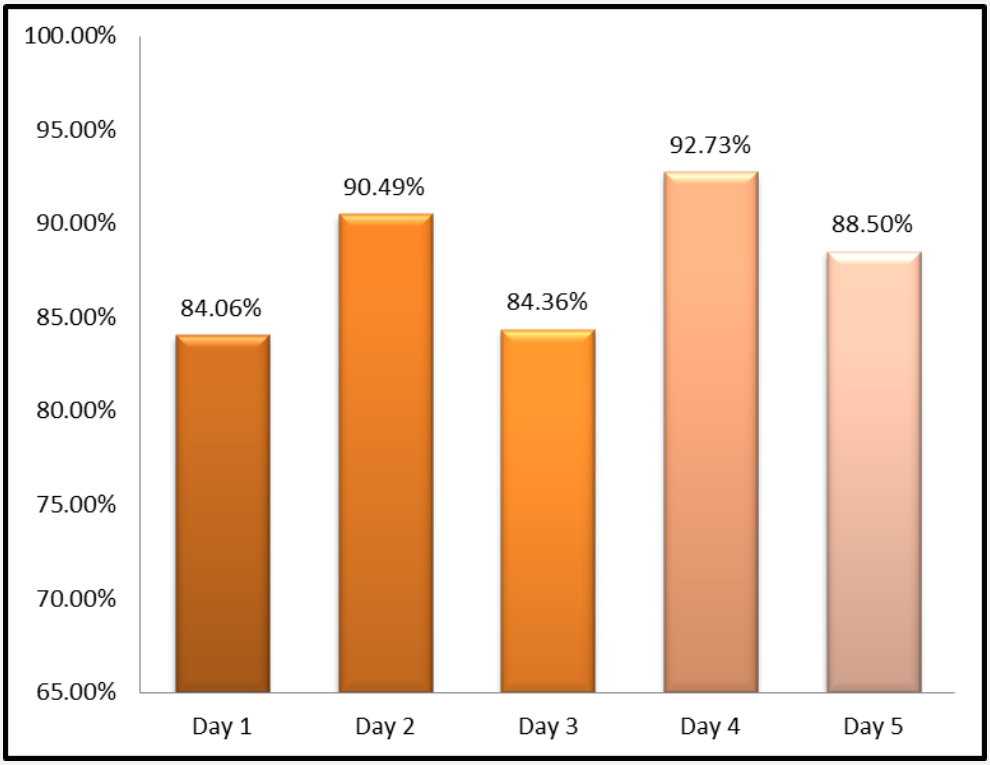
The mean score for learning environment, on the other hand, was scored nearly five percentage points lower on average than the next lowest score (clarity of objectives), though with much greater variance between sites than any of the other criteria.

Thirdly, the overall mean approval ratings for each day of the FIM programme show only relatively small fluctuations in participant satisfaction (see Figure 12). Recall the structure and contents of each of the five days as specified in the programmatic outline:

1. Introductory day;
2. Understanding the organisational context;
3. Self-awareness and leading for professional and personal growth;
4. Service quality and performance;
5. Practical management of teams.

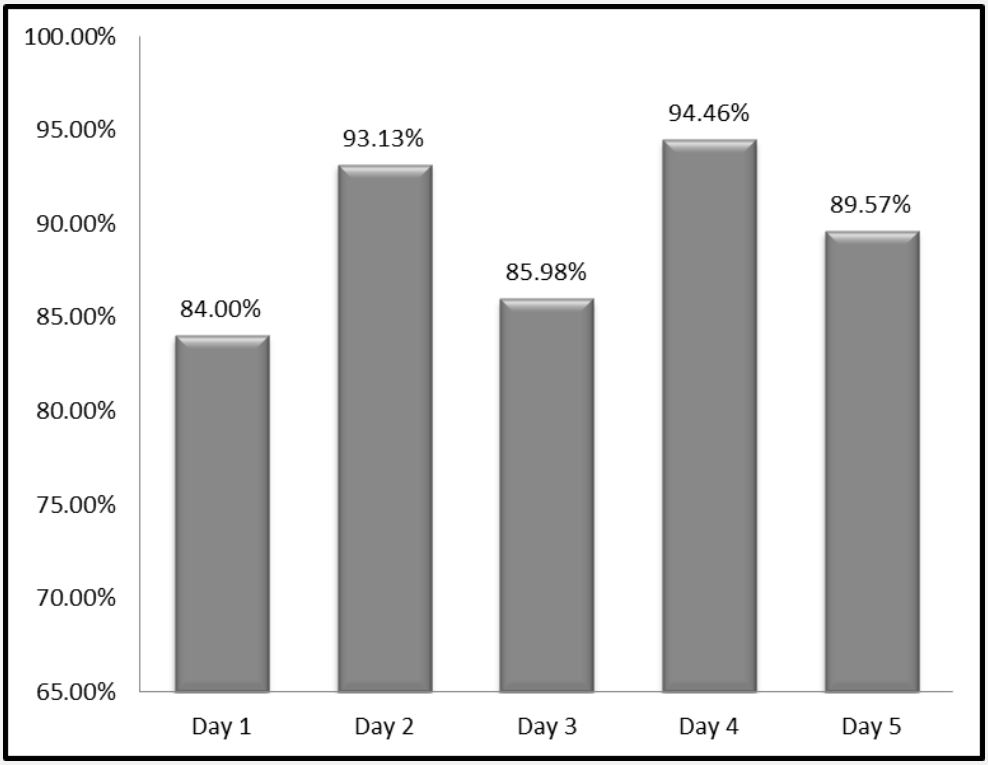
Overall, Days 2 and 4 were the most well-received. Days 1 and 3 were less highly scored by participants than these, but still very satisfactorily at 84%+. Day 5, meanwhile, was somewhere in between, and replicated the overall mean very closely.

FIGURE 12: OVERALL APPROVAL RATINGS, BY DAY



An interesting reflection on the programme materials themselves is to re-examine these scores when the highly variable learning environment scores are removed from the mean calculations (i.e. to examine scores that relate only to the programme and its teaching). If this is done, then (with the exception of those from Day 1), participant scores appear yet more impressive (see Figure 13, below).

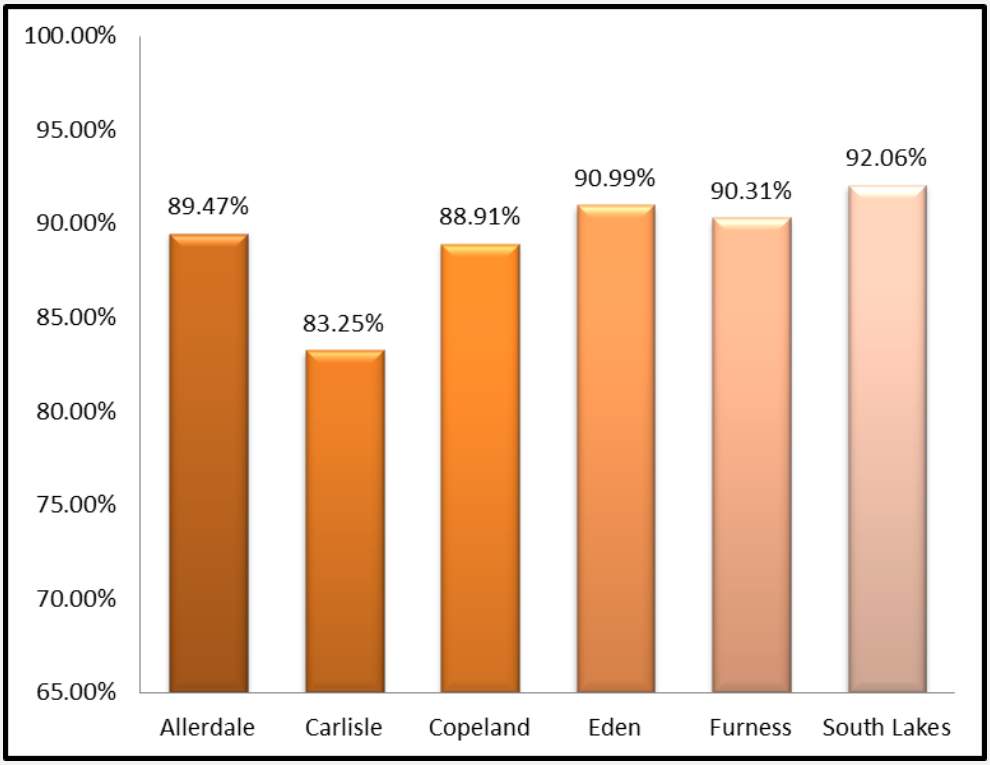
FIGURE 13: OVERALL APPROVAL RATINGS, BY DAY, LESS ENVIRONMENT



This mode of investigation is even more telling when the mean findings are examined by-site. When considering the full overall site scores, as illustrated in Figure 14, all sites bar Carlisle score in a very narrow band (just over 3%) between 88.91% (Copeland) and 92.06% (South Lakes). This would seem to bear testament to strong consistency of delivery between sites.

The Carlisle-based participants, meanwhile, ranked their overall experience of the FIM programme around 5.5% lower than those at Copeland, and 9% lower than those at South Lakes. While this is a relatively minor fluctuation on the grander scale, one possible explanation for this, given the multi-site format of the programme, and as proposed at the beginning of section 3.1.2, is that the physical environment at the Carlisle site itself adversely affected the overall learning experience. As discussed with respect to Figure 14, however, this explanation proves an unlikely one.

FIGURE 14: OVERALL APPROVAL RATINGS, BY LOCATION

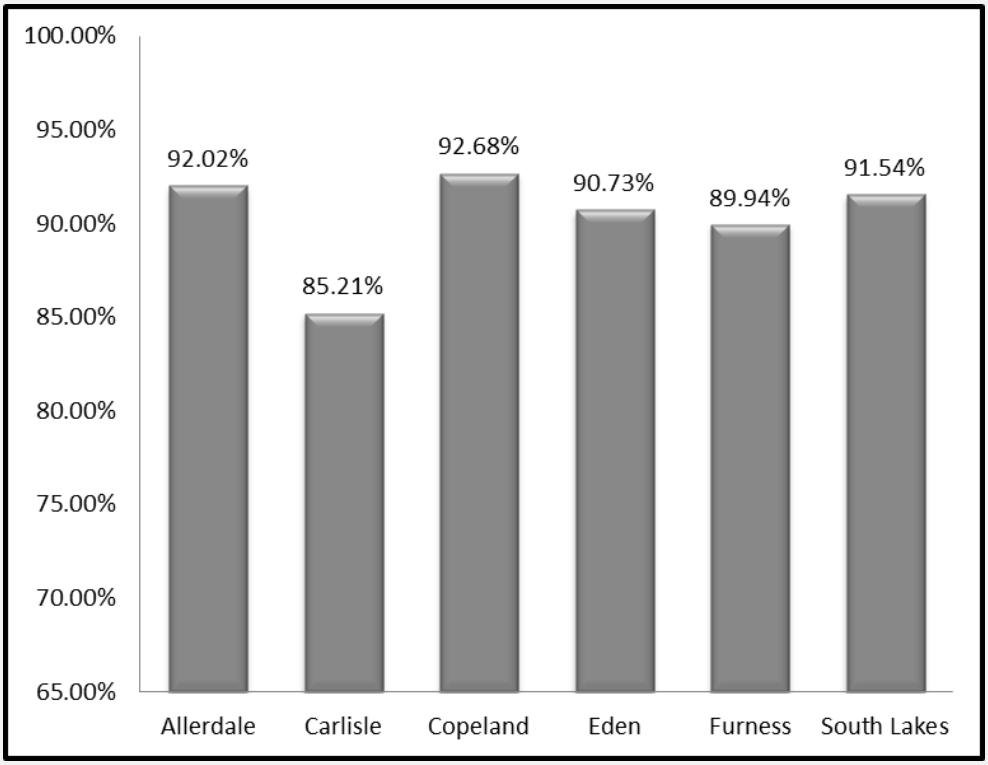


The same data set, but excluding the learning environment scores, is shown in Figure 15. While this lifts Copeland's rating from fifth among the six to first, it only reduces the variance in mean scores between sites very slightly. The top five scores are now within a band of less than 3%, and the gap between Carlisle and the next lowest score is around 4.5%.

In short, and as initially outlined in section 3.1.2, although learning environment may impact in some ways upon broader learning experience, this impact is relatively small. Indeed, a Pearson correlation between learning environment scores and mean scores of the other four evaluation criteria reveals no relationship of any note at all. As such, the slight variance between ratings for the Carlisle experience and the other scores is likely due to a different factor, or set of factors. It is unlikely, given the high and, above all, consistent, scores for overall experience at the other sites, that this is an aspect of the delivery in Carlisle.

The most likely explanation (prior to investigation of qualitative feedback) is that this result is a foible of the group dynamic itself, or simply a critical mass of relatively "harsher" scorers.

FIGURE 15: OVERALL APPROVAL RATINGS, BY LOCATION, LESS ENVIRONMENT

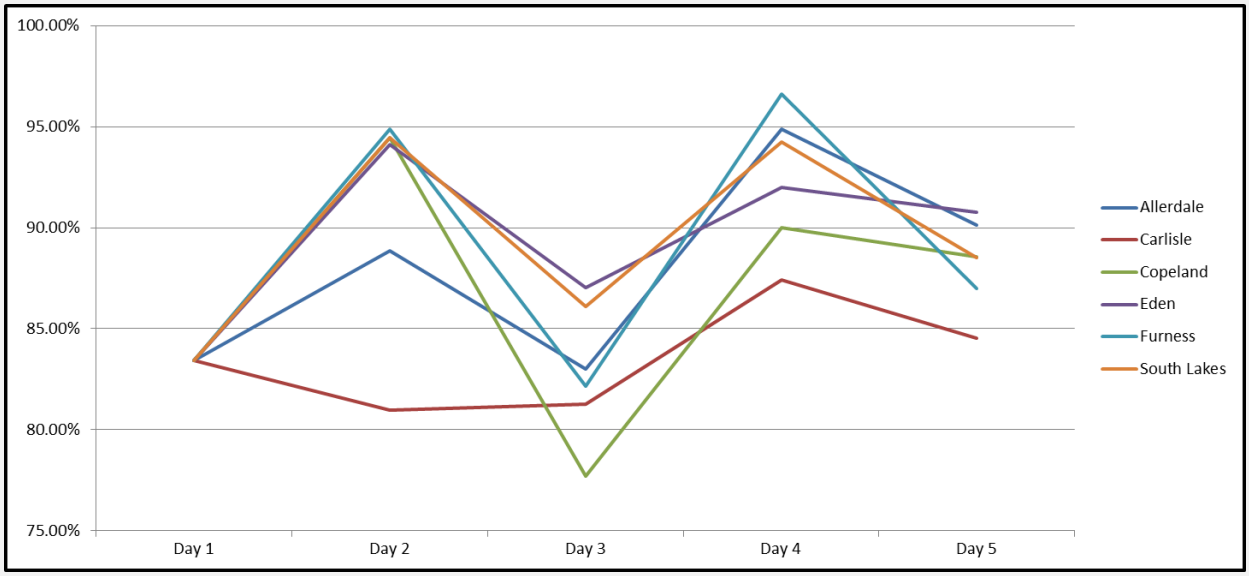


Finally, in Figure 16 and Figure 17, multifactorial analyses are presented by way of overall summaries. The means used herein are inclusive of all evaluation categories, including learning environment.

The former of these comparatively illustrates overall satisfaction scores by day for each site. Recall that there was a common first day on the programme, hence the homogenous scores for that entry. This figure helps illustrate the fluctuations in scores in-context, and also gives a stronger sense of the relative variances within the data set.

Of particular interest here is the manner in which Copeland-based participants are the only set to rate any day (Day 3) at less 80% overall. A review of the extended data set (see Appendix 1), however, reveals that this day at Copeland received very poor learning environment scores indeed, while those for all other criteria remained relatively high.

FIGURE 16: APPROVAL BY-LOCATION-BY-DAY

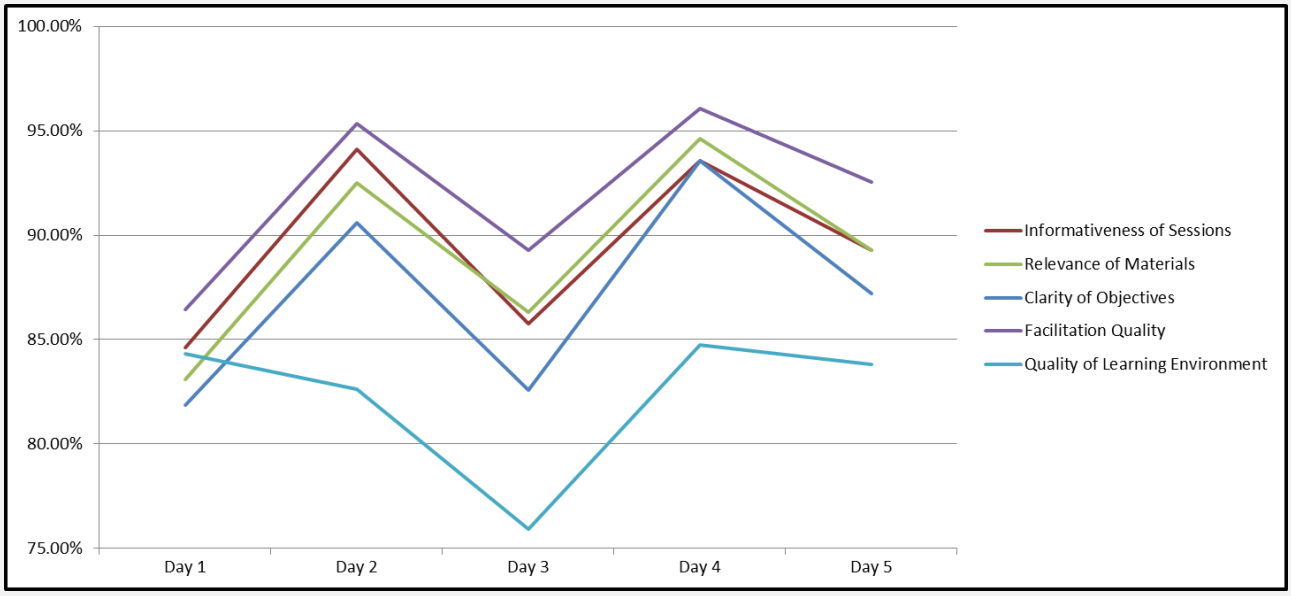


The latter of these figures (below) shows how approval varies by evaluative criterion and by day. What is striking here is that, with the clear exception of learning environment, all of the other (pedagogical) criteria vary very consistently; this is to say that they broadly increase together and decrease together in relatively similar proportions.

This evidences a strong and consistent interrelationship between the structure, relevance, content and delivery of the programme. All four of these criteria lift from Day1 to Day 2; all four drop from Day 2 to Day 3; all four lift from Day 3 to Day 4; and all four drop (slightly) from Day 4 to Day 5.

Moreover, from a participant point of view, there was no day in FIM that was "interesting but irrelevant," or "well-facilitated but dull." When relevance scores go up, so do facilitation scores; when clarity scores drop, so do those for how informative the materials are. This may be a reflection on FIM itself – i.e. that it was delivered in a very "holistic" manner – or it may also be a function of the way in which the participants addressed the practical business of appraising and scoring. Given the large number and wide diversity of participants taking part in the programme, however, the former is a more credible explanation.

FIGURE 17: APPROVAL BY-CRITERION-BY-DAY



Further light can be shed on these findings with due consideration of the qualitative feedback outlined in section 3.3.

3.3. Qualitative feedback: modular analysis

In this section, qualitative participant feedback across all five days of the FIM programme is summarised by-day.

Due to the sheer volume of qualitative feedback data collected on the 360 forms, a micro-analysis inspecting raw data themes for all five days at all sites is not tenable within the parameters of this evaluation. Instead:

- Feedback from Day 1 *is* broken-down on a tabular question-by-question basis, presenting direct data, due to the combined single-venue audience.
- Days 2-5 are analysed in a more classically intermediate-thematic manner; to help highlight broader patterns in participant feedback pertaining to positive, descriptive and developmental themes, and thus elucidate important issues that arose in the quantitative analysis.

3.3.1. Day 1 themes

In Figure 18, a thematic breakdown of comments on the relevance of Day 1's training to current professional roles is displayed.

FIGURE 18: FIM DAY 1, RELEVANCE OF TRAINING TO ROLE.

Sample Data	Sub-Theme	Meta-Theme	
• *Very relevant and looks at key aspects of my leadership.* • *Extremely relevant - I wish this had been available sooner.* • *Extremely relevant - presenters and sessions very good.* • *Relevant to all aspect of my role and practice.*	Unmitigated positive.	Personal Value	**Positive**
• *Definitely - it has given me more confidence to fulfil my role.*	Confidence-builder.		
• *Very relevant in terms of context setting.* • *It has given me a better understanding of the Trust.*	Context setting.	Institutional	
• *I think the content was good to update clinical staff on corporate issues.*	Important in understanding trust structures.		
• *It is relevant because it's giving me knowledge to pass on to my staff.* • *Very helpful for my team.*	Team Value.	Collective	
• *Useful to learn about the Board and Trust priorities and put faces to names.* • *Interesting to be able to put names to faces - a shame that we have to come together to an organised event to meet folks in our workplace.*	Networking.		
• *Not currently, but hopefully will be useful in the near future.*	Not useful yet, but will be.		**Prospective**
• *I'm new in leadership role and I feel that this course will help me develop to be an effective leader.* • *Just entering into leadership so I found it helpful.*	New to management, encouraging content.		
• *Clinical based but some relevant discussions.*	Too clinical.	Relationship to Practice	**Negative**
• *Relevant as to what needs to be done but miles away from clinical role.*	Not clinical enough.		
• *Interesting info about the Trust but not all useful in day-to-day job - more background information.* • *Not really relevant to my role at times but generally covers things OK.*	Some detachment from practice.		
• *Not relevant yet as there was too much information to take in adequately.*	Information saturation precludes relevance.	Delivery Issues	
• *I felt that as a "middle manager" the content of the course was above my level and understanding.* • *[Some] presentation was quite dry and a bit above me I think.*	Some aspects overpitched.		

In Figure 19, a thematic breakdown of comments on the appropriateness of the level of content for Day 1's training is displayed.

FIGURE 19: FIM DAY 1, APPROPRIATENESS OF CONTENT.

Sample Data	Sub-Theme	Meta-Theme	
• *Yes very appropriate - a good introduction to the programme* • *Yes - i just wish my line manager were here to hear it!* • *Yes - gave a good overview and feel for the organisation*	Unmitigated Positive.	Personal Value	**Positives**
• *Yes - it was good to put faces to high level execs etc.* • *Met more than I expected.*	Networking.	Collective	
• *Content very informative and appropriate however it has been a very long day to take it all in.*	Quality vs. Quantity.	Content vs. Structure.	**Mitigated Positives**
• *Yes - some was repetitive.* • *Good balance of speakers vs. Having to do exercises which can sometimes be repetitive.*	Good but Repetitive.		
• *Some content was appropriate; some we need to know about but would not necessarily feature high on our priorities during day to day practice.*	Informativeness vs. Relevance.		
• *Less information overload.* • *A lot of information was given in the one day.*	Information Overload.	Planning	**Negatives**
• *Long day and concentration was waning towards the end of the day.* • *The day was very long.* • *Suggest shorter introduction about the trust as more leadership/management skills and approaches etc. Needed. I feel the information I got today could have been provided in less time.*	Excessive Duration		
• *I felt that as a "middle manager" the content of the course was above my level and understanding.* • *Some was, some wasn't to my level/role.* • *Some of course seemed above my level of knowledge.*	Some Aspects Overpitched.	Style	
• *Too much of being talked at, not enough interaction.* • *I felt that some more interactive activity would have helped cope with the amount of information given* • *More audience participation would have been good.*	Lack Of Interactivity		
• *Some bits very corporate.* • *It felt very corporate.*	Excessive 'Corporatism'	Content	
• *Many references to adult and mental health services would have liked more reference to children's services.*	Topically Over-Specific.		

The third qualitative question on the feedback form requested that participants identify one key positive 'take-home' matter from their day's training.

As one may well expect, the feedback provided thus anchors closely to the materials being conveyed. In Figure 20, the key positives drawn from Day 1 relate chiefly to the meta-themes of Propositional Knowledge Gained (i.e. new things learned) and likely Changes to Managerial Approach that could arise from the training. As regards the former, the key positives fell into three main categories: Understanding of CPFT's structures, the humanising of management pathways (i.e. gaining knowledge of whom upper management actually are) and the knowledge that personal professional managerial problems are often not unique, but experienced by others.

FIGURE 20: FIM DAY 1, POSITIVES DRAWN.

Sample Data		Sub-Theme		Meta-Theme
• *Better knowledge of the organisation and its vision.* • *Clear idea of the organisational structure.* • *Good to learn about the Board and how it works.*		Understanding of CPFT Structures and Values		**Propositional Knowledge Gained**
• *Positivity and networking links.* • *A clear recognition of the support available to support my role and that I am important to the Trust.* • *Good to know that Governors and Execs are on board with staff that want to provide a good quality service and help lead colleagues to do the same.* • *It was powerful to hear real leaders from the organisation talking about leadership.*		Humanising Managerial Pathways		
• *The problems affecting my department seem to be the same in other areas and are therefore widespread.* • *That all areas are expressing the same concerns and blocks to effective leadership.* • *That maybe senior management not always aware of problem on the front line.*		Better Contextualisation of Problems		
• *To try to adopt a democratic leadership style whilst considering the needs of the Trust.* • *Feeling that I need to influence the staff to improve their support of each other - work corporately.*		Think Holistically		**Change Approach**
• *To be proactive, not reactive.* • *Be positive and proactive.*		Be Proactive		
• *Question requests when prioritising pressured workload.* • *To have more freedom to challenge management.* • *The knowledge that I can challenge if I feel I need to.* • *Challenge the systems.* • *Not to be afraid to ask questions*		Be Ready and Able to Question		
• *Begin to think about what I can gain from this course and become more effective as a leader.* • *Prioritise and plan.* • *Put more time aside.* • *To make time to reflect and learn.* • *Reflect on own management styles and delivery.*		Planning and Reflection		
• *The John Lewis Model - staff views are valued.* • *Need to encourage patient response questionnaires. Need to continue to learn about higher management structure.* • *Targets in my area - feedback if we are meeting them.*		Encourage and Value Feedback		
• *The patient safety and good outcomes are the priorities.*		Define Priorities		
• *It's up to me to be part of developing a quality service.*		Self-Reliance		
• *Try to be a positive role model for my team.* • *Much better awareness of the role expected from a leader*		Be a Role-Model		
• *I must find out more about Clinical Commissioning Groups and influence*		**Awareness of Knowledge Shortfalls**		

As regards changing approaches, participants identified a number of themes they would take home from the day, not least the need to think holistically about leadership within the trust, the need to plan effectively and the value of proactivity. In Figure 21, feedback is displayed pertaining to participants' ideas on what might have been desirable additions to the Day 1 programme.

FIGURE 21: FIM DAY 1, DESIRABLE ADDITIONS.

Sample Data		Sub-Theme		Meta-Theme		
• *No - a full day that was very well presented and organised.* • *Very comprehensive and informative.*		No Additions Necessary				**Positive**
• *[S]alad at lunch. Not just starchy foods which are lovely but not conducive to weight loss!*		Catering		Organisation		**Suggested**
• *A shorter lunch break to finish earlier as had a long way to travel* • *More short breaks and opportunities to stretch our legs.* • *[A] shorter lunch break would have been better and a coffee break during the morning session.* • *Comfort break in the morning.* • *More breaks - sessions too long at times* • *A toilet break in the morning is a must.*		Timetable Structure				
• *The smaller modules may prove to be more suitable/beneficial.*		Training Structure				
• *Less speakers - two half days maybe.* • *Less content - sat for long periods of time.*		Workload				
• *More interaction and group work.* • *More group work or seating in rows so easier to see the speakers.*		Interactivity				
• *Flu vacs - would have been a good opportunity!* • *Opportunity for flu clinic was declined - opportunity to capture a large staff group.*		Flu Clinic		Content		
• *Dealing with conflict and complaints.* • *More skills/info on leadership and management, more group sessions/ideas and discussion.* • *The difference between the various NHS Trusts/PCT's etc.*		Materials				

While some participants were universally positive about the day, a range of key suggestions were floated with respect to how it might have been further improved. Foremost of these was the basic timetabling structure, and the need for more regular breaks to preserve comfort and concentration.

There were also suggestions relating to information overload (and that the day may have functioned better as two half-days), a need for more interactivity and a missed opportunity regarding the twinning of the day with a flu clinic. In Figure 22, meanwhile, data are shown which reflect an array of positive and negative concerns, and also some more neutral recommendations. Day 1 participants highlighted a range of core positive issues which revisit a number of themes previously discussed; the opportunities to contextualise their own professional lives and network with others being particularly salient.

FIGURE 22: FIM DAY 1, ADDITIONAL COMMENTS

Sample Data	Sub-Theme	Meta-Theme	
• *Very informative and interesting day.* • *Thank you for a great, informative day.* • *I found the day very interesting especially due to the challenging times the NHS is now facing.* • *Great use of time, thanks.*	Unmitigated Positive.	Personal Value	**Positives**
• *It makes me feel better knowing every service appears to have the same problems - it's not just me.* • *[Knowing] that other areas have the same problems and it was just not my area as my manager would lead me to believe.* • *[G]ood to see what other services are experiencing - realising that all services are feeling the same!*	Contextualising		
• *Nice to talk to lots of different professionals in a leadership/management role. Has refuelled my enthusiasm to go and become a good/effective leader.* • *It was good to meet the senior management and Directors of the Trust.* • *Good networking opportunities.*	Networking.	Collective	
• *Stands at lunchtime very good and excellent refreshments!*	Catering	Practical	
• *I would recommend the Trust register with LinkedIn to facilitate communication with all levels of staff. Also consider an info@ email / website for general enquiries.*	e-Support	Materials	**Recommendations**
• *I would also like to have a diagram and photos of the other levels of management below the Board of Directors. It's really important to understand who the managers are and who the emails we receive are from.*	Networking		
• *It would have been good to meet as a large group to discuss if the people we have met today have had the same experience from the course.*	Follow-Up	Opportunities	
• *Sorry but the day was far too long and it was impossible to concentrate for that length of time and also was a lot to ask from people. Two half days would be better.* • *The morning was too long.*	Excessive Duration	Planning	**Negatives**
• *It would have been nice to get the opportunity to introduce everyone on the table and their background before starting any discussion.* • *Lunchtime could have been shorter for a shorter day* • *An hour would have been plenty for lunch and networking* • *A mid-morning break would have been helpful to increase attention levels etc. as it was a long time from the start of the day to lunch time.* • *Not enough breaks and sessions running into each other. Important to have regular breaks to increase alertness etc.*	Session Organisation		
• *Room was cold this morning.* • *Room was quite cold - would have been better to have a shorter lunch break.*	Environment		
• *Poor refreshments during AM session.* • *Room and coffee cold during morning.*	Catering		
• *Feel like the PM session lost its way!*	Topic Drift	Content	
• *We hope/expect to hear some feedback about the 'blocks' raised to effective leadership. There is a lack of training in some areas having an impact on the workplace, pressures and care provided i.e. male catheterisation, continence assessment and HCA administration of insulin.*	Focus		

Similarly, the more negative commentaries reinforce prior emergent themes relating to the organisation of the day, not least information saturation, the need for more breaks and more careful environmental monitoring. Some of the recommendations were very constructive, meanwhile; the

opportunity for the group to meet and reflect on the training was mooted, as were mechanisms for aiding in the humanisation of upper-management and enhanced e-support to the programme.

3.3.2. Day 2 themes

Reflecting the quantitative feedback, Day 2 of the FIM programme was subject to near uniform praise from participants (see Figure 23), with only some localised venue-related issues providing any cause for actual complaint.

FIGURE 23: FIM DAY 2 QUALITATIVE FEEDBACK

	Success Themes	Developmental Themes
Content and Relevance	High relevance throughout	Mixed relevance to for role
	Interesting throughout	
	Strong practical implications/tools	
	Value of leadership very useful	
	MBTI very useful	
	Resilience work very useful	
	Circle of influence work very useful	
	"Rust-Out" work very useful	
Pitch and Delivery	Optimal pitch	Last session first?
	Good interaction between participants	Day slightly overlong
	Strong facilitation style	Over-use of "buzzwords"
	Strong facilitator knowledge	
	Good supporting handouts	
	Facilitators very approachable	
	User-friendly delivery	
	Good examples provided	
Venue	Good catering (Fu)	Room too small (Al; Ca)
	Good venue (Ed; Fu)	Room too warm (Ca)
		No desks (Al)
		Poor catering (Ca)
		Unhealthy food (Ed)
Impacts	Greater self-awareness	
	Greater confidence to take on role	
	Feel more assertive	
	Will be more reflective	
	Will delegate more	

Participants were strongly positive about the practical value of the knowledge and skills learned, not least the MBTI, and the manner of their delivery. The only developmental issues arising regarding organisation related to the potential facility of placing some materials from the final session earlier in the day, and a tendency towards using "buzzwords" that are not always accessible to all. Participants also reported feeling more self-aware, confident and assertive as a result of what they had learned, and expected to be more reflective in their roles, and readier to delegate.

3.3.3. Day 3 themes

The reception of Day 3, meanwhile, was a little more mixed than that of Day 2 (see Figure 24).

FIGURE 24: FIM DAY 3 QUALITATIVE FEEDBACK

	Success Themes	Developmental Themes
Content and Relevance	High relevance throughout	Budgets not part of job
	Financial & budget skills very useful	Mixed relevance throughout
	Demand and capacity very useful	Too much mental health bias
	KPI & resource management very useful	Too much on adult services
	Performance information very useful	Some repetition
	Information capture materials very useful	
	Contemporary nature of materials	
	Strong linkage to CPFT	
	Role integration into patient journey	
Pitch and Delivery	Optimally pitched	Budget sessions too complex
	Strong teaching styles	Budget sessions too simplistic
	Good pacing of materials	Not enough group interaction
	Clear and informative	No pre-provided agenda sheet
	Made dry topics interesting	Handouts hard to read
	"Who wants to be a millionaire" very effective	Too much data in afternoon
	Authoritative presentation	Case studies would have been useful
Venue	Excellent catering (Fu)	Room too dark (Al)
	Good venue (Ed; Fu)	Room too cold (Co)
		Room too noisy (SL)
		Weak catering (Ca)
Impacts	Confidence to challenge common knowledge	
	Greater comfort with CPFT structures	
	More confidence in role	
	Fewer worries about financial procedures	

The materials were strongly praised by many participants for their practical workplace value and contemporary focus. The sessions on budgets, however, were not seen as relevant by some, while others perceived an "over-emphasis" on mental health services, and adult services (at the expense of children's services), in the delivery. Reflecting the highly mixed cohort, while many participants reported that the budget-work was optimally-pitched, some found it too complex, while others found it over-simplistic.

Generally, the feedback on the teaching and facilitation was very positive. The sessions were reported to be well-paced, clear and the leaders used styles and techniques (not least "Who want to be a millionaire?") that brought what were seen as "potentially dry" topics to life. Some participants felt that there was an excess of direct teaching at the expense of group interaction, and others felt subject to some data-overload in the afternoon. Those that struggled with the level of the materials mooted the idea of using case studies as means to clarify.

In terms of personal impacts arising from the day, participants reported feeling more confidence to challenge "common knowledge" in the working world, a greater comfort with CPFT's structures and organisation, more basic confidence in their own role and a decreased anxiety level around organising budgets and finances.

3.3.4. Day 4 themes

In Figure 25 (below), the evaluative feedback from Day 4 of FIM is schematised. Comments herein are more in line with those of Day 2, being overwhelmingly positive about the materials and delivery. All of the various materials covered during the day were praised for being relevant and practical, with the HR session and the work on preparing for potentially difficult conversations receiving particularly strong plaudits. A few participants maintained that some of the day's materials were not as yet relevant to their roles, but all foresaw situations in the future where they would become useful, or indeed essential.

The delivery was similarly highly-rated, with participant feedback being favourable about the pitch and pacing of the day, the interactive approach taken and the knowledge and style of the facilitators. Especially well-reported was the manner in which reflection was built into this approach. Problems in this domain were limited, with some participants finding the HR session a little simplistic, and a number proposing that some of the materials (not least those regarding difficult

conversations) could have been yet further animated with a role-play, rather than case-study, component.

FIGURE 25: FIM DAY 4 QUALITATIVE FEEDBACK

	Success Themes	Developmental Themes
Content and Relevance	High relevance throughout	Limited relevance in the present, but expect more in future
	Very practical materials	
	HR skills very useful	
	Networking skills very useful	
	Communication skills very useful	
	Conflict management skills (particularly prep for difficult conversations) very useful	
	Team identity work very useful	
	Strong focus on reflection	
Pitch and Delivery	Optimal pitching	HR session a bit basic
	Excellent facilitation	Some parts a little rushed
	Strong facilitator knowledge	Potential for role-play component?
	Strong interactive approach	
	Good time for reflection	
	Optimal pacing of materials	
Venue	Good venue (Ed; Fu; SL)	Poor catering (Ca)
	Good catering (Al; Fu; SL)	Room too cold (Co)
		Parking problems (SL)
Impacts	More motivated	
	More confidence to manage people	
	Less afraid of conflict	
	More enthusiasm for future change in CPFT	

Remarks on venues were mixed, with Allerdale, Eden, Furness and South Lakes receiving generally favourable feedback, and Carlisle and Copeland less so.

Finally, participants reported feeling more motivated around their roles following involvement in the day, more confident about future interactions with the people they manage, less afraid of conflict and more enthusiastic about the future changes in CPFT.

3.3.5. Day 5 themes

Feedback from the final day of FIM is outlined in Figure 26 (below):

FIGURE 26: FIM DAY 5 QUALITATIVE FEEDBACK

	Success Themes	Developmental Themes
Content and Relevance	High relevance throughout	Limited relevance in the present, but expect more in future
	Obvious practical application / Strong theory-practice links	Workforce planning not relevant, but interesting anyway
	Capacity and demand work very useful	
	PDSA provides strong structure	
	Workforce planning is essential learning	
	Work on managing change very useful	
	Work on delegation of distractions very useful	
	"Buckets and rocks" very useful	
	Positive leadership aspect very useful	
	Understanding personality traits very useful	
Pitch and Delivery	Optimal pitching	Workforce planning section to high-end
	Strong pacing	Some parts aimed at higher grade bands?
	Inspiring delivery	Information overload
	Strong facilitation	More practical direction on application of tools needed
	Relaxed environment	More reflection time needed
	Fun learning	Powerpoint-heavy delivery
Venue	Good venue (Ca; Fu)	Room too cold all day (Al)
	Good catering (Al; Ca)	Room too cold in the morning (Co)
		Room to hot in the afternoon (Co)
Impacts	Will cope better with change	
	Motivated to try out new tools	
	Greater confidence in leadership	
	Greater empathy with others	

Materials were again seen to be strongly practical, and participants praised the manner in which the relevance of theory to the workplace was made clear. The workforce planning component was that more variably received, being seen as "essential" by some, and "irrelevant but interesting" by others. Although pitching of the sessions was seen as optimal by the bulk of participants, with some indeed voicing very strong approval of the relaxed and informal manner in which the day was carried-off,

others felt that some elements (and largely the workforce planning materials) were aimed at higher grade-bands, and were over-complex. Some also felt that there was too much information in one day, that some sessions were Powerpoint-heavy, and that this overload led to a lack of time to properly reflect on the materials.

The feedback on the venues was once again mixed, with the room at Copeland achieving the feat of being too hot *and* too cold in the same day. Impact-wise, participants reported that they now felt better equipped to cope with change, motivated to try out the new tools with which they had been equipped, more confident as leaders in general and that their capacity for empathy and understanding had been enhanced.

3.5. Session evaluation feedback: summary

- Systematic analysis of **N=360** evaluation forms collected from FIM participants after taught session yielded a wide range of qualitative and quantitative findings pertinent to each of the five days of the programme.
- Quantitatively, the overall mean satisfaction rating for FIM (i.e. taking into account all participant scores for all criteria at all sites on all days) is a very impressive **88.30%**.
- The quality of facilitation was the aspect of FIM most appreciated by participants, with a mean rating of 91.94%.
- In terms of being informative, relevant and having clear objectives, mean scores in the very high 80% range were achieved.
- The mean score for learning environment was scored nearly five percentage points lower on average than the next lowest score (clarity of objectives), though with much greater variance between sites than any of the other criteria.
- The overall mean approval ratings for each day of FIM programme show only relatively small fluctuations in participant satisfaction; Day 1 = 84.06%; Day = 90.49%; Day 3 = 84.36%; Day 4 = 92.73%; Day 5 = 88.50%.
- All sites bar Carlisle score in a very narrow band (just over 3%) between 88.91% (Copeland) and 92.06% (South Lakes). This would seem to bear testament to strong consistency of delivery between sites.
- From a participant point of view, there was no day in FIM that was "interesting but irrelevant," or "well-facilitated but dull." When relevance scores go up, so do facilitation scores; when clarity scores drop, so do those for how informative the materials are. This may be a reflection on FIM

itself – i.e. that it was delivered in a very "holistic" manner – or it may also be a function of the way in which the participants addressed the practical business of appraising and scoring. Given the large number and wide diversity of participants taking part in the programme, however, the former is a more credible explanation.

- Qualitatively, on Day 1 the key positives fell into three main categories: Understanding of CPFT's structures, the humanising of management pathways and the knowledge that personal professional managerial problems are often not unique, but experienced by others.
- Participants identified a number of themes they would take home from the day, not least the need to think holistically about leadership within the trust, the need to plan effectively and the value of proactivity.
- Some participants expressed discomfort with basic timetabling structure, and the need for more regular breaks to preserve comfort and concentration.
- There were also suggestions relating to information overload (and that the day may have functioned better as two half-days), a need for more interactivity and a missed opportunity regarding the twinning of the day with a flu clinic.
- Following the day, participants reported increased confidence around their roles and a greater ease around the notion of upper-management.
- Day 2 of the FIM programme was subject to near uniform praise from participants, with only some localised venue-related issues providing any cause for actual complaint.
- Participants were strongly positive about the practical value of the knowledge and skills learned, not least the MBTI.
- Participants noted the potential facility of placing some materials from the final session earlier in the day, and a tendency towards the facilitators using "buzzwords" that are not always accessible to all.
- Participants reported feeling more self-aware, confident and assertive as a result of what they had learned, and expected to be more reflective in their roles, and readier to delegate.
- The Day 3 materials were strongly praised by many participants for being practical and contemporary.
- The work on budgets was seen as highly relevant by some and not at all by others. Some found it optimally-pitched, some found it too complex and others found it over-simplistic.
- The sessions were reported to be well-paced and clear, and that the leaders used strong teaching styles and facilitation techniques.
- Some participants felt that there was an excess of direct teaching at the expense of group interaction, and others felt subject to some data-overload in the afternoon.

- Those that struggled with the level of the materials mooted the idea of using case studies as means to clarify.
- Participants reported feeling more confidence to challenge "common knowledge" in the working world, a greater comfort with CPFT's structures and organisation, more basic confidence in their own role and a decreased anxiety level around organising budgets and finances.
- Participants were overwhelmingly positive about the Day 4 materials and delivery, with the HR session and the work on preparing for potentially difficult conversations receiving particularly strong plaudits.
- The delivery was similarly highly-rated, with participant feedback being favourable about the pitch and pacing of the day, the interactive approach taken and the knowledge and style of the facilitators.
- Some participants found the HR session a little simplistic, and a number proposed that some of the materials (not least those regarding difficult conversations) could have been yet further animated with a role-play, rather than case-study, component.
- Participants reported feeling more motivated around their roles following involvement in the day, more confident about future interactions with the people they manage, less afraid of conflict and more enthusiastic about the future changes in CPFT.
- Day 5 materials were again seen to be strongly practical, and participants praised the manner in which the relevance of theory to the workplace was made clear.
- The workforce planning component was that more variably received, being seen as "essential" by some, and "irrelevant but interesting" by others.
- Some participants voiced very strong approval of the relaxed and informal manner in which the day was carried-off.
- Some also felt that there was too much information in one day, that some sessions were Powerpoint-heavy, and that this overload led to a lack of time to properly reflect on the materials.
- Impact-wise, participants reported that they now felt better equipped to cope with change, motivated to try out the new tools with which they had been equipped, more confident as leaders in general and that their capacity for empathy and understanding had been enhanced.

4. Results II: Participant Interviews

Systematic thematic analysis of **N=10** interviews with FIM participants yielded six global themes, which are explored in depth in sections 4.1 to 4.6:

1. Training content;
2. Training organisation;
3. Extant workplace impacts and constraints;
4. Projected workplace impacts and constraints;
5. Extant personal impacts, and;
6. Hopes and fears.

Note: in the feedback directly pertaining to the training itself (themes 1 and 2), raw data themes marked in blue are positive or descriptive in nature, those marked in red are developmental in nature, and those marked in orange are "double-edged swords" (i.e. containing both positive and developmental components).

4.1. Training content

The content of the FIM training was widely applauded by participants, with seven of the nine raw data themes being highly positive, across four key domains:

A. Practicality of materials;
B. Targeting of materials;
C. Pitch of materials, and;
D. Context-setting value of materials.

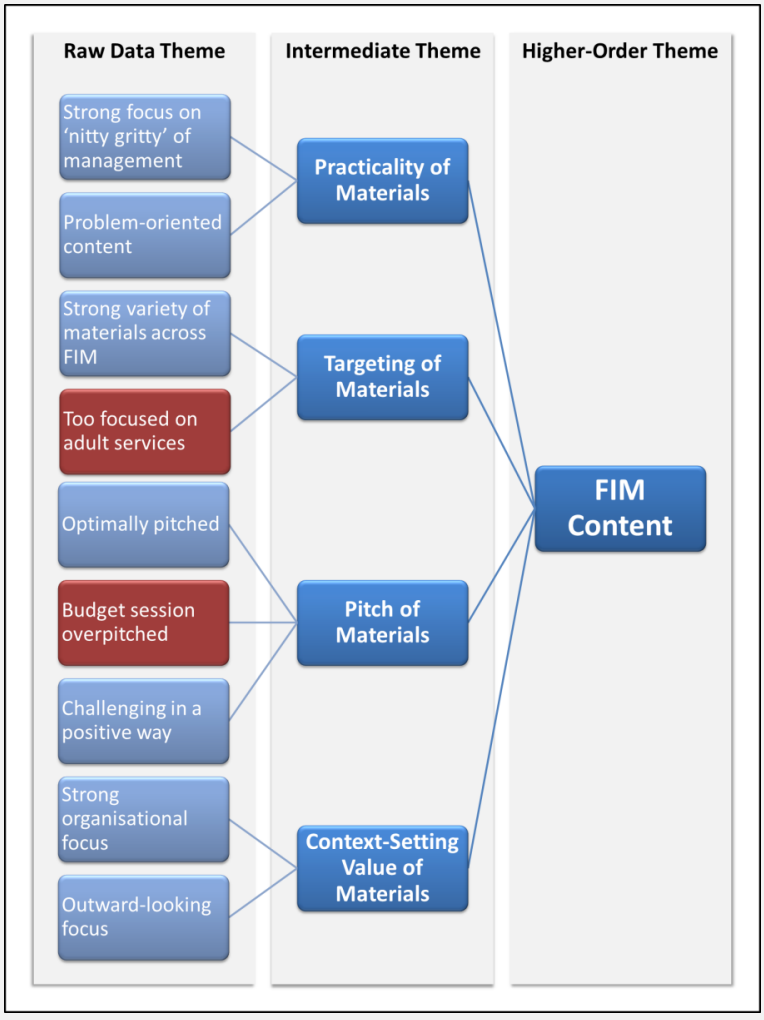
As evidenced in Figure 27, and in terms of practicality, participants praised both the grounded focus on everyday issues (rather than purely on theories of them), and the allied problem-solving approach adopted. For example:

P5: *"There has been some very good points been made that I'm now trying to apply to my day-to-day work. "*

P6: *"I love anything practical because that's how I learn, because I forget things really easily. We did a little thing with invoices where we had to look at invoices last time and that's stuck in my memory really well."*

P7: *"I think the Trust has long since been crying out for something like this, the course is very specific, and for people at a lower level there has just been nothing as I have been trying to find a course like this for about two years, so it was a Godsend so it's all positive really, it really came at the right time."*

FIGURE 27: THEME 1 - TRAINING CONTENT



"Some of the parts have been a little high level for me, but most of it has been extremely beneficial because it never hurts to learn something...so yes, I speak very highly of it."

The targeting of the materials to a highly differentiated cohort was also reported to be highly effective, with participants from many different roles and services finding the range of issues and topics to be varied, but largely or wholly relevant nevertheless. The only issue of dissent herein was voiced by a single participant who felt that the general targeting was skewed towards adult services at the expense of children's.

The "pitching" of the materials was also praised throughout the sample; participants reported finding the level of learning to be optimal, or challenging-but-rewarding. For example:

> ***P3:*** *"[The level] has been just fine."*
>
> ***P7:*** *"Some of the parts have been a little high level for me, but most of it has been extremely beneficial because it never hurts to learn something...so yes, I speak very highly of it."*

Only the session on budgetary management was criticised by some participant for being genuinely "overpitched" and difficult to understand.

Finally, in the realm of FIM content, the strong focus on the Trust itself (its mission, and the roles of participants within it) was praised on a number of levels, not least its facility for putting things in-context. Typically:

> ***P2:*** *"I think realising who some people are and how the trust works has been good because I'm so new to it. Sometimes I've found myself saying "oh yes, the penny has dropped now, I actually understand why that is in place and why certain things are working" especially with the information and governance and record keeping side of things, it actually makes you understand how to explain it then to other staff."*

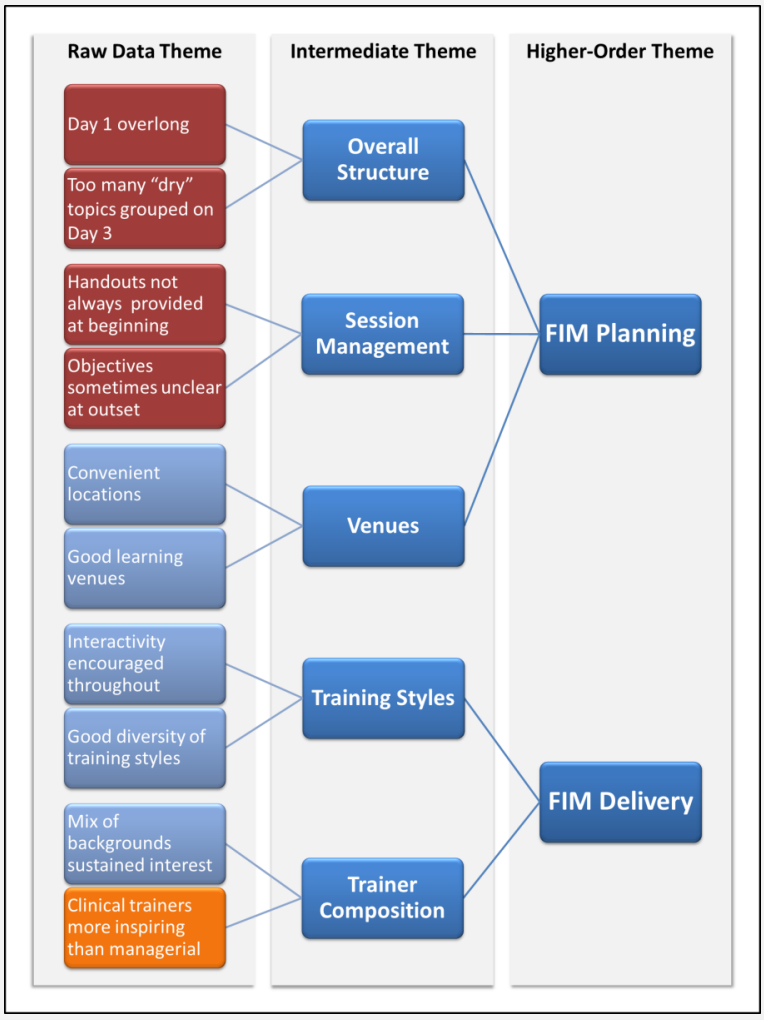
4.2. Training organisation

The organisation of the sessions, the days and the overall FIM itself were all matters drawing strongly favourable participant feedback, although Figure 28 would appear to show a more balanced picture. It is, of course, important to reassert here that the qualitative method employed herein is designed to elucidate the *range* of themes discussed by participants, but not the quantity of

participants discussing them. Emergent raw data themes, thus, grouped under five intermediate headings:

A. Overall structure;
B. Session management;
C. Venues;
D. Training styles, and;
E. Trainer composition.

FIGURE 28: THEME 2 - TRAINING ORGANISATION



"The venue has been excellent because the trust has put it into different localities, so for once I haven't had to travel very far. I can actually walk to it which I don't do for anything at all in this job!"

Although the general feedback on structure and session management was highly affirmative, the *specific* issues raised were developmental. Regarding the overall structure of FIM itself, some participants felt that the Introductory Day was overlong and dragged a little towards the end, while others found that the concentrating of multiple "dry" (i.e. procedural) topics onto Day 3 was taxing on the concentration. In terms of session management, meanwhile, the only developmental issues raised pertained to the beginning of some sessions, in which initially unclear objectives and a lack of pre-provided handouts were reported to be problems.

The multiple-venue model of FIM was, on the other hand, universally praised with participants providing strongly affirmative feedback on the proximate locations of the venues, and on the quality of those venues themselves:

> ***P1:*** *"The choices of location have been absolutely spot-on."*
>
> ***P2:*** *"The venue has been excellent because the trust has put it into different localities, so for once I haven't had to travel very far. I can actually walk to it which I don't do for anything at all in this job!"*

Similarly, the styles and personalities of the trainers were seen as major plus-points for FIM, with high approval received for (a) the diversity of approaches taken, (b) the variety of internal and external trainer backgrounds (keeping a heterogeneous audience continually engaged):

> ***P3:*** *"I think it's a lot better to have some sort of outside approach….we need to maintain [this] sort of outside contact because it's that different viewpoint, because you can become too insular if everything is done in house."*
>
> ***P4:*** *"I think it's good to draw on the resources that you have in the trust, you've got a huge trust with a lot of experienced people, but it's also good to have the external people come in who have the experience and the personalities and everything."*
>
> ***P6:*** *"External people bring a lot to it, because they bring a different side to it, they bring a business side to it rather than just the NHS side to it so I think that was good."*

The strongly interactive model of learning used throughout (and particularly later in the programme) was also a key positive for the FIM participants:

> ***P5:*** *"Now the group are talking about particular subjects and what the outcome is from the group and things like that, it's very interactive."*

"Now the group are talking about particular subjects and what the outcome is from the group and things like that, it's very interactive."

There was only one participant with any reservations on this front, and this was something of a mixed commentary on the ability of the trainers from different backgrounds to inspire the audience, arguing that those from clinical backgrounds had proven more inspiring that those from managerial roles.

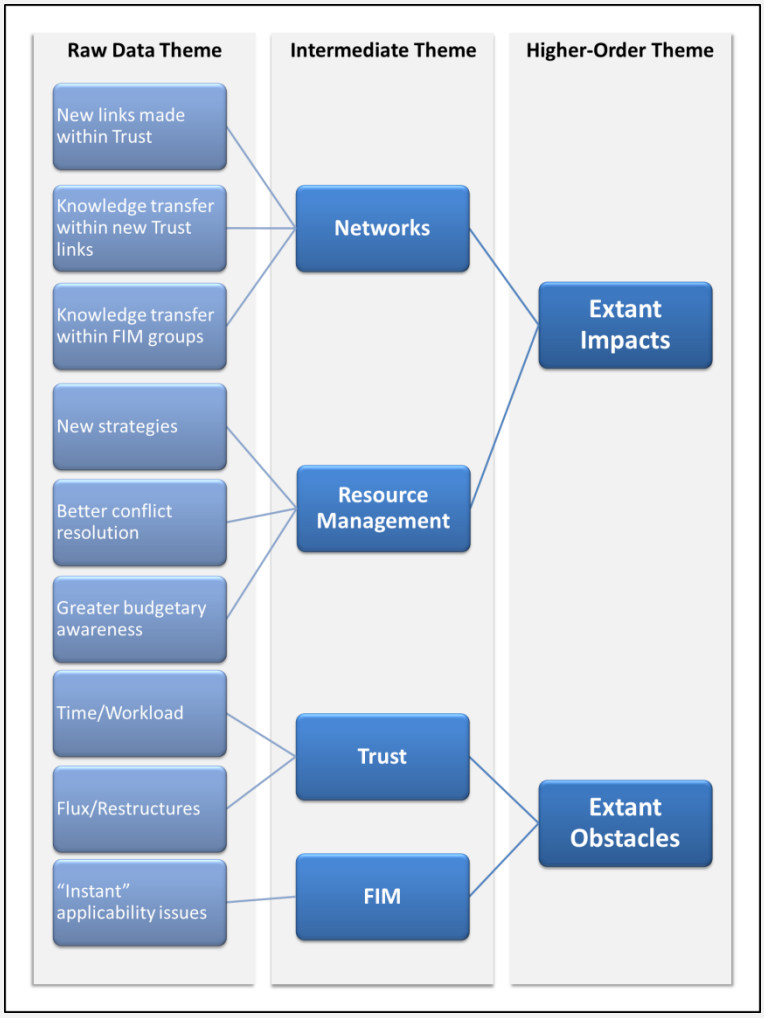
4.3. Workplace impacts and constraints (extant)

Even at a relatively early stage, some participants reported a number of workplace impacts already felt as a result of their involvement in FIM, alongside a smaller number of obstacles that they had encountered in trying to bring about changes. The workplace impacts made (as evidenced in Figure 29, below) fall chiefly under two major themes: (a) the development and use of new networks, (b) stronger resource management skills.

Regarding network formation, several participants reported strong knowledge-transfer and the sharing of best-practice within the FIM cohort itself. Perhaps more strikingly, however, participants reported having engineered new links across CPFT itself as a direct result of their work within FIM:

> ***P1:*** *"In terms of networking, I think I have made some good contacts – people who can help me understand how their services work, how they do what they do, what their structures are, how to engage and that sort of thing."*

FIGURE 29: THEME 3 - EXTANT WORKPLACE IMPACTS AND CONSTRAINTS



In terms of direct workplace impacts, it was clear that a range of active changes had been introduced in a number of workplaces following absorption of FIM materials. One of the key aspects of this was the direct implication of new (team)working strategies and approaches:

> ***P3:*** *"I reviewed our working practices within my own team and brought in a better way of working - a pretty big change…I spent a whole weekend working through the things that I felt wasn't working and how I wanted them to change to make them work better and I brought in a whole new way of working within one of the teams."*

> ***P7:*** *"We got a leadership style questionnaire that we had filled in for ourselves, and I gave that to all 5 members of my admin team to fill in with regards to me, and it was quite interesting so I did learn a few things from there where I thought "maybe there*

was more I could be doing there" and I realised I could learn to do things a little bit differently."

"I can't say I have a big interest in budgets, but since I've done [the] team lead work I've been much more aware of budgets and budget constraints."

Moreover, actively stronger empathy with others, and consequently more confident capacities for communication and the management of conflict, were reported: For example:

> ***P6:*** *"If you've got issues, or people in your team might have an issue with something, I am now able to add another dimension to it because I'm now more aware of why we're doing things, and why things are happening."*

Better understandings of budget situations and management were also a recurrent theme, even among those who voiced little enthusiasm for the matter at large:

> ***P7:*** *"I can't say I have a big interest in budgets, but since I've done [the] team lead work I've been much more aware of budgets and budget constraints."*

Types of obstacles to these impacts encountered by participants were two-fold. The first related to CPFT-related issues such as the predictable restrictions of time and workload, plus restructures that require any localised changes be put on hold until new teams are formalised:

> ***P8:*** *"Workload constraints, because it's like any course. Once you have been on that course it sort of almost sits on the shelf and because you're not having time to take that information and make an impact on the work you're doing, because there is no space in between and that is what I find is really the most difficult thing about any course that you do. It's a bit like your driving test really, you need to do the test before you're up and running."*

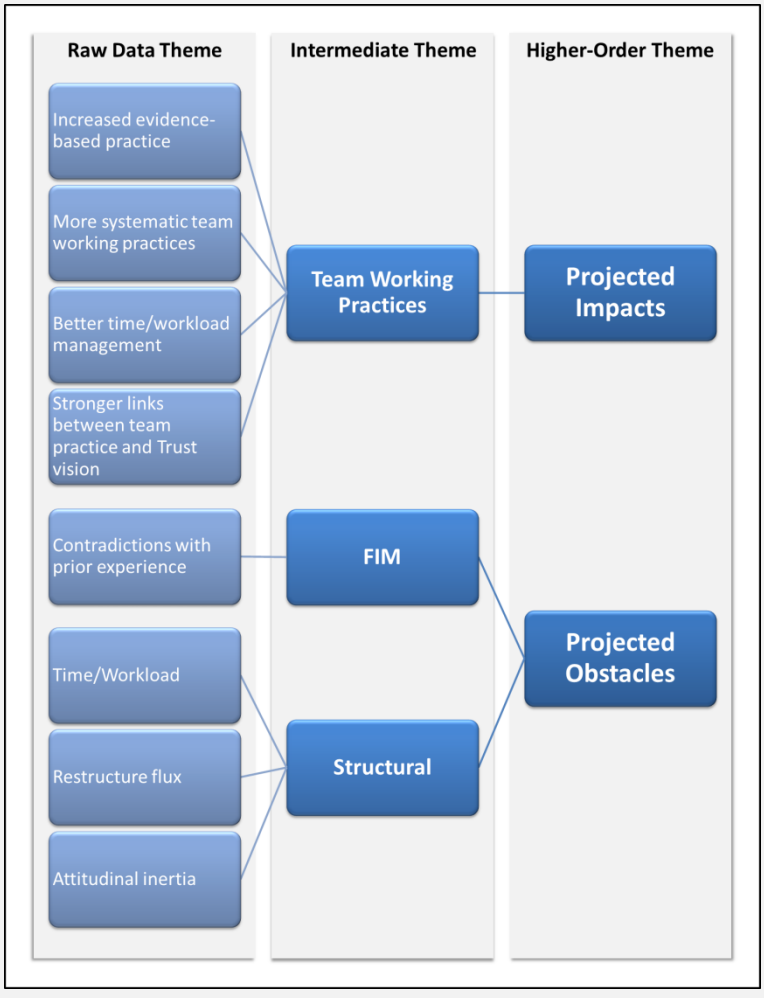
The second type of "obstacle" to extant impact was in the FIM materials themselves, which were seen by some not as "quick fixes" but the foundations for longer-term changes which themselves would take time and energy to bring about.

P6: *"I'm realising now that that isn't a quick thing, and it's going to take an awful lot of work on my part to make it work."*

4.4. Workplace impacts and constraints (projected)

Participants further discussed their own expectations of future workplace impacts that they anticipated making as a consequence of their involvement in FIM, and also likely obstacles to these (Figure 30).

FIGURE 30: THEME 4 - PROJECTED WORKPLACE IMPACTS AND CONSTRAINTS



"I can see myself changing within my management team, I'm trying to make everything evidence-based."

The projected impacts themselves were relatively narrow in range, but confidently asserted throughout the sample. Firstly, several participants hoped, as a consequence of involvement in FIM, to move their teams towards a strong model of evidence-based practice. For example:

> ***P5:*** *"I can see myself changing within my management team, I'm trying to make everything evidence-based."*

Secondly, further measures (such as those noted in Section 4.3) were anticipated to make working within teams more streamlined and systematic. Some of these were simple, but potentially telling:

> ***P3:*** *"If I'm organising a meeting, I'm trying to use proper things like Outlook invites and things like that."*

Participants also revisited the themes of greater integration between CPFT vision, and of direct time and workload management skills. Regarding likely obstacles likely to be encountered in the future, meanwhile, issues of effecting attitudinal change among colleagues, time and workload, and the flux caused by restructures, were all seen as unlikely to vanish from the working life:

> ***P3:*** *"Well I work in Finance, so from mid-March to mid-May there will be a lot of issues around workload, but after that it'll settle down again, but that's the difficulty I have got at the minute, I have to fit this in with year-end, but that's like in the finance world!"*

> ***P8:*** *"If you get moved about or your job changes, that might change the way you operate in a particular job. Some jobs require you to offer or behave in certain ways that are different to a different job."*

In one case, however, a participant highlighted how the need to reconcile the materials from FIM with some borderline-contradictory learning from a previous course attended elsewhere would cause problems with making an impact:

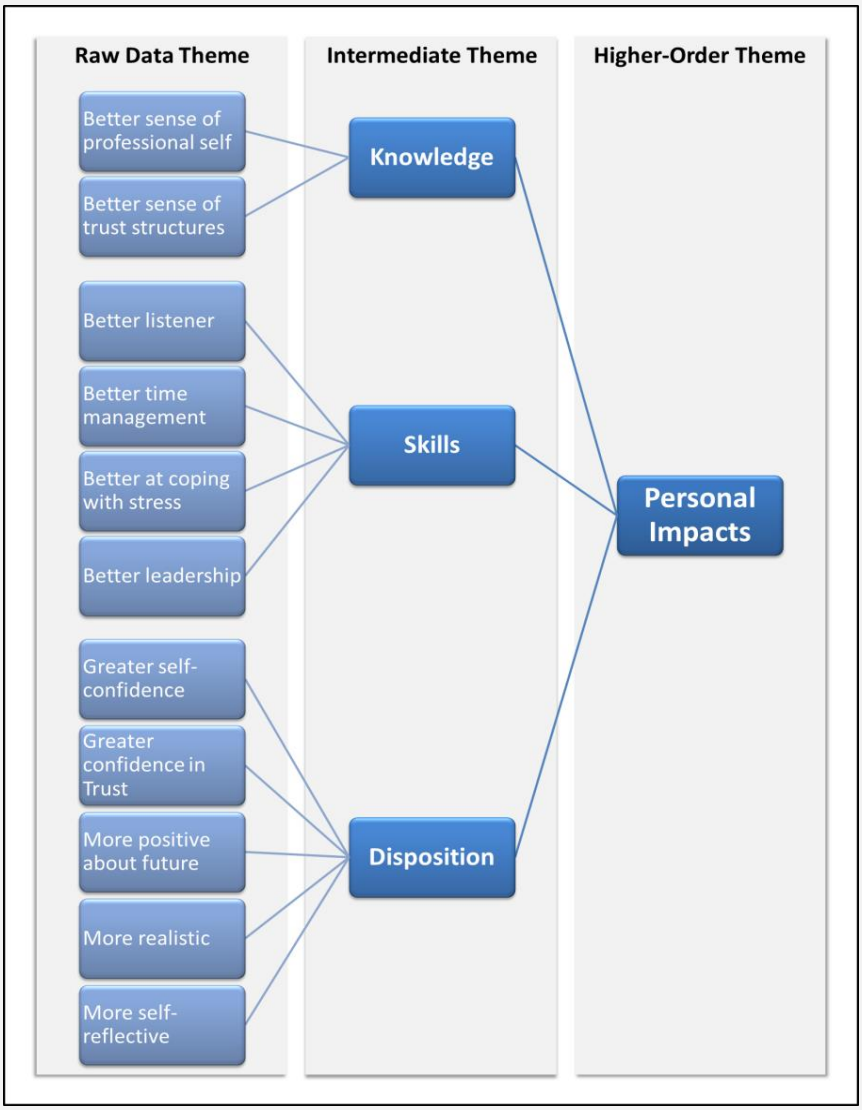
> ***P1:*** *"I think my biggest barrier is having a suite of tools already in place, so actually what somebody is presenting me with here is they are giving me a toolbox and what I'm saying is "it's really nice that you're showing me this toolbox, but I've already got my own.""*

4.5. Personal impacts

By some margin, the most variegated and extensively discussed high-order theme to emerge from the participant interviews related to the *personal* impacts made by FIM on its participants (Figure 31). These impacts grouped into three domains:

A. Knowledge;
B. Skills;
C. Disposition.

FIGURE 31: THEME 5 - EXTANT PERSONAL IMPACTS



The impacts on knowledge were, perhaps, the most expected as knowledge-gain is one of the manifest purposes of any learning enterprise. Participants reported a much stronger sense of the Trust's structures, and also a much better understanding of their own place within it.

> ***P6:*** *"I think probably knowing who is out there and what they do, and what their interests are, I think there was a nice talk on the first day about targets saying why we are there and why we do them because that is the bit that frustrates people and to be able to say why we are doing them like "because the institution has to do this, this and this…""*

In terms of participant upskilling, meanwhile, stronger capacity for listening was recurrently noted by participants:

> ***P7:*** *"I think I'm listening to my team more now, not that I wasn't listening before, but I am listening more now, I'm more aware."*

Better capacity to deal with stress was also reported, and strongly linked to this were improved time and workload management skills, giving the participants space at work to think more clearly and effect the changes that they intend:

> ***P5:*** *"I've picked up a lot of learning points like…things about time-management."*

> ***P6:*** *"It's getting more organised in every aspect of the team management and I'm trying to manage people better and things better and including my workload management and things like that, it's very useful."*

Providing a bridge with the next set of themes, in the dispositional domain, the final skill-based improvement reported by FIM participants relates to leadership itself. A better understanding of leadership styles and techniques (and especially the use of the MBTI) effected a more generally skilled, sensitive and above all confident approach to leading teams.

An important raw-data theme to emerge from the corpus of interview data, and that which links many of the others, is that of *confidence*. This issue itself manifested with both inward and

"I'm certainly feeling very positive about what I can possibly do in the future."

outward trajectories. As regards the latter, a greater confidence (even faith) in the trust and its vision/directions was reported as an output of FIM, and particularly the first day thereof:

> ***P6:*** *"I feel the trust are wanting to invest in leadership, which is a good thing as we tend to get put into these roles and you just kind of roll into them. But they actually want to make us a good leader and get that going."*

As regards the former, greater *self*-confidence was reported by several participants:

> ***P4:*** *"I think it's generally increased my confidence at work."*

> ***P6:*** *"I'm feeling confident as a leader and…that other people can depend on me in my leading as well."*

Connected closely to confidence for FIM participants was the issue of positivity, particularly that about their own future and that of the trust:

> ***P2:*** *"I'm certainly feeling very positive about what I can possibly do in the future."*

> ***P7:*** *"[The outlook] is all positive really, [this] really came at the right time."*

Finally in terms of dispositional changes, a number of participants reported a FIM-driven movement towards a more realistic and reflective working self; in short, they adopted a more careful, structured and inclusive approach to their role and interactions with others:

> ***P1:*** *"I'm making time to make things happen."*

> ***P3:*** *"I'm certainly thinking harder about people when I make decisions."*

> ***P10:*** *"It's a very reflective process; it makes you stop and think."*

4.6. Hopes and fears

The final high-order theme to emerge from the corpus of interviews related to hopes and fears/worries that had been stimulated by FIM, and also suggestions regarding additions to FIM for future cohorts.

As evidenced in Figure 32, the hopes voiced by participants were either borne of (a) increased enthusiasm for learning or (b) heightened awareness of issues that FIM had catalysed.

FIGURE 32: THEME 6 - HOPES AND FEARS

"I don't think I realised [before] just how much responsibility I have in my position."

Regarding hopes, several participants reported a newly-found enthusiasm for learning, which would translate into more engagement with materials from FIM itself, or engagement with new training programmes:

> ***P4:*** *"I'm going to look into some of the books that have been recommended and I'm going to try different styles and techniques."*

> ***P6:*** *"You've got more of an understanding of your own manager, so you know why they're doing what they're doing and how their time is used by doing these big projects and yeah it does make you want to keep learning."*

> ***P10:*** *"Yes, I'd love to have further training and would love to go on the next stage for this because I'm on a foundation I would love to go. My manager at the moment is doing the next level, so I'd love to go on that absolutely, and I'm always quite keen for learning and advancement and improving. That's just a part of me really, so I'd love to, if there is an opportunity for the next level, that would be fantastic, that would be my ambition."*

As an output of the enhanced systemic/organisational awareness provided by FIM, participants reported sustained hope that greater understanding and cooperation would be fostered within and between teams. This awareness was, however, seen to be, to some extent, a double-edged sword as it was also responsible for fostering worries in three areas: (a) a stronger understanding of the weight of expectation upon leaders, (b) knowing "how little you actually know" about management and leadership and (c) coming to understand the sheer range of personality types, and personal needs, within any team. For example:

> ***P2:*** *"I don't think I realised [before] just how much responsibility I have in my position."*

> ***P8:*** *"I think it's just things that you don't know that worries me, and I've identified that sometimes what happens when you're doing a course that there is a lot that you don't know and what you don't know can be quite significant and can actually impact on how you operate."*

Finally, participants made a small number of proposals regarding useful future additions and applications of programme itself. In terms of additions, active mentoring was suggested:

> ***P3:*** *"I think one of the things that we did feel that we needed was possibly a mentor, and that allocation at the beginning and not necessarily your line manager, as your line*

manager is actively involved in the same situations as you are, from my point of view it'd be nice to get that outside perspective and I think that would be helpful."

Also, having a more formal qualification attached to the programme was viewed as a potential incentive and reward:

P9: *"I went through something similar in my last Trust. It was much more limited, there were about 15 people from the whole Trust went to it and there was a Quality Case at the end and maybe that'd be good to have some sort of Quality Case to recognise somewhere that people have taken part, rather than just a certificate at the end. It was a lot more structured, it was by a professional marking body, I think there was one piece of coursework. Doing something like that might make it more into a "I've got this qualification" rather than "I went on a course for however many days." That might be useful."*

Finally, it was argued that the lessons of FIM regarding organisational vision and understanding of personalities could be used to help shape the formal CPFT induction programme:

P1: *"I think [there is] a massive opportunity to enhance the induction process – let's not put 100 people through the same induction process when they have absolutely nothing in common, not their personalities but their job roles – let's not do that. I also think it's worth saying let's set the cultural tone, as you don't get another chance at a first induction do you?"*

4.7. Participant interviews: summary

With consideration of participant interview data discussed above, it is possible to assert the following set of principles:

- Systematic analysis of **N=10** interviews with FIM participants yielded six global themes: (a) training content, (b) training organisation, (c) extant workplace impacts and constraints, (d) projected workplace impacts and constraints, (e) extant personal impacts, and (f) hopes and fears.

- In terms of practicality of content, participants praised both the grounded focus on everyday issues (rather than purely on theories of them), and the allied problem-solving approach adopted.
    - The targeting of the materials to a highly differentiated cohort was also reported to be highly effective. The only issue of dissent herein was voiced by a single participant who felt that the general targeting was skewed towards adult services at the expense of children's.
    - The "pitching" of the materials was also praised throughout the sample. Only the session on budgetary management was criticised by some participant for being genuinely "overpitched" and difficult to understand.
    - The strong focus on the Trust itself (its mission, and the roles of participants within it) was praised on a number of levels, not least its facility for putting things in-context.
- The organisation of the sessions, the days and the overall FIM itself all drew strongly favourable participant feedback.
    - Some participants felt that the Introductory Day was overlong and dragged a little towards the end, while others found that the concentrating of multiple "dry" (i.e. procedural) topics onto Day 3 was taxing on the concentration.
    - The beginning of some sessions were reported to have initially unclear objectives and a lack of pre-provided handouts.
    - The multiple-venue model of FIM was universally praised with participants providing strongly affirmative feedback on the proximate locations of the venues, and on the quality of those venues themselves.
- The styles and personalities of the trainers were seen as major plus-points for FIM, with high approval received for (a) the diversity of approaches taken, (b) the variety of internal and external trainer backgrounds (keeping a heterogeneous audience continually engaged).
    - The strongly interactive model of learning used throughout (and particularly later in the programme) was also a key positive for the FIM participants.
- Even at a relatively early stage, some participants reported a number of workplace impacts already felt as a result of their involvement in FIM.
    - Participants reported strong knowledge-transfer and the sharing of best-practice within the FIM cohort itself. Participants reported having engineered new links across CPFT itself as a direct result of their work within FIM.
    - In terms of direct workplace impacts, new (team)working strategies and had been brought about following absorption of FIM materials.

    - Stronger empathy with others, and consequently more confident capacities for communication and the management of conflict, were reported.
    - Better understandings of budget situations and management were also a recurrent theme.
- Obstacles encountered included CPFT-related issues such as the predictable restrictions of time and workload, plus restructures that require any localised changes be put on hold until new teams are formalised. "Obstacles" also included the FIM materials themselves, which were seen by some not as "quick fixes" but the foundations for longer-term changes which themselves would take time and energy to bring about.
- The projected impacts of FIM were relatively narrow in range, but confidently asserted throughout the sample:
    - Several participants hoped to move their teams towards a strong model of evidence-based practice.
    - Measures were anticipated to make working within teams more streamlined and systematic.
    - Participants also revisited the themes of greater integration between CPFT vision, and of direct time and workload management skills.
- Regarding likely future obstacles, issues of effecting attitudinal change among colleagues, time and workload, and the flux caused by restructures, were all seen as unlikely to vanish from the working life.
- In one case, however, a participant highlighted how the need to reconcile the materials from FIM with some borderline-contradictory learning from a previous course attended elsewhere would cause problems with making an impact.
- By some margin, the most variegated and extensively discussed high-order theme to emerge from the participant interviews related to the *personal* impacts made by FIM on its participants.
    - Participants reported a much stronger sense of the Trust's structures, and also a much better understanding of their own place within it.
    - In terms of participant upskilling, meanwhile, stronger capacity for listening was recurrently noted by participants. Better capacity to deal with stress was also reported, as were improved time and workload management skills.
    - A better understanding of leadership styles and techniques (and especially the use of the MBTI) effected a more generally skilled, sensitive and above all confident approach to leading teams.

- A greater confidence (even faith) in the trust and its vision/directions was reported as an output of FIM, and particularly the first day thereof. Greater *self*-confidence was also reported by several participants.
- Connected closely to confidence for FIM participants was the issue of positivity, particularly that about their own future and that of the trust.
- A number of participants reported a FIM-driven movement towards a more realistic and reflective working self; in short, they adopted a more careful, structured and inclusive approach to their role and interactions with others.
- Several participants reported a newly-found enthusiasm for learning, which would translate into more engagement with materials from FIM itself, or engagement with new training programmes.
- Participants reported sustained hope that greater understanding and cooperation would be fostered within and between teams.
- This awareness was also responsible for fostering worries in three areas: (a) a stronger understanding of the weight of expectation upon leaders, (b) knowing "how little you actually know" about management and leadership and (c) coming to understand the sheer range of personality types, and personal needs, within any team.
- In terms of additions, active mentoring was suggested, and having a more formal qualification attached to the programme was viewed as a potential incentive and reward.
- Finally, it was argued that the lessons of FIM regarding organisational vision and understanding of personalities could be used to help shape the formal CPFT induction programme.

5. Results III: Managerial Interviews

Systematic analysis of N=3 interviews with managers of FIM participants yielded three global themes, which are explored in depth in sections 5.1 to 5.3: (a) FIM expectations, (b) FIM impacts, and (c) FIM novelties.

5.1. FIM expectations

Managers discussed their expectations of *personal* impacts on FIM participants in three domains; skills, disposition and knowledge (see Figure 33).

FIGURE 33: THEME 1 - FIM EXPECTATIONS

In terms of upskilling, the expectations expressed were fairly generic in terms of the skills involved in 'being a manager'. Increased authority – i.e. the skill to influence – was expected, as was a general sense of the tools required to lead. Typically:

> ***M1:*** *"Very much around the proper foundation and the basis of what management is, really."*
>
> ***M2:*** *"My expectations were the same for all staff that I nominated and that was around to give them a foundation and an understanding of basic management tools."*

There was much greater clarity, meanwhile, around the dispositional changes expected as a consequence of FIM participation. Primarily, it was expected that participants would grow in stature and confidence in leadership roles (i.e. be personally and professionally empowered by what they learned):

> ***M1:*** *"[The participant] was acting-up in a senior post and was not confident at all when she first started. I was hoping that the course would kind of give her a bit of guidance and support and enable her to grow her confidence really in her role."*
>
> ***M2:*** *"[I hoped that the participants would] be empowered to be team leads, because we targeted the team lead level or potential team lead that would be band 6's or band 7. I identified them as having potential, and that this was the foundation for them to move on to develop their role as team lead."*

More than this, it was expected that participants' knowledge of the wider Trust, the corporate and procedural systems within it, and the strategic context of their own positions within the bigger picture that would facilitate the capacity to network:

> ***M2:*** *"I wanted them to be updated an familiarised with the HR processes and that links to sickness and absence, return to work, the amendments, the change management forms, all of that type of thing that are all things that we have to utilise in a management role and also the same with finance, and any of the other corporative services that support us as management."*

"Well she's, she's most certainly gained in confidence and she's gained in confidence around line management."

> ***M3:*** *"I was hoping that he would get a better idea of sort of strategic context in the Trust, meet people who are in a similar management role, or…his management peers and get an ideal of the issues that he is dealing with and are probably very similar for the other people…"*

Finally, M2 further voiced the hope that FIM would help promote standardisation in managerial systems throughout the Trust which would, in turn, enhance the transferability of skills between services and departments:

> ***M2:*** *"I wanted them to have a standardised approach, because it's been very ad-hoc previously. If everyone had a standardised approach it meant that [people] could easily have transferable skills to other services if required."*

5.2. FIM impacts

In terms of the impacts actively resultant of FIM, managers observed a wide range in two primary domains: (a) personal impacts (i.e. dispositional changes and upskilling), and (b) strategic impacts (i.e. differences made in the workplace itself). These are outlined in Figure 34 below.

As regards the former, all of the more disposition-oriented impacts that managers had previously anticipated regarding FIM (see section 5.1) were manifest in their post-FIM observations, plus some additional unforeseen benefits. Participants were reported to have become more socially and self-confident, and to be showing greater interpersonal authority:

> ***M1:*** *"I think because she is one of the youngest members of the team that kind of has an impact in terms of her confidence I think. I have certainly seen an improvement in that, she is very confident in her role now."*

> ***M2:*** *"Well she's, she's most certainly gained in confidence and she's gained in confidence as line management."*

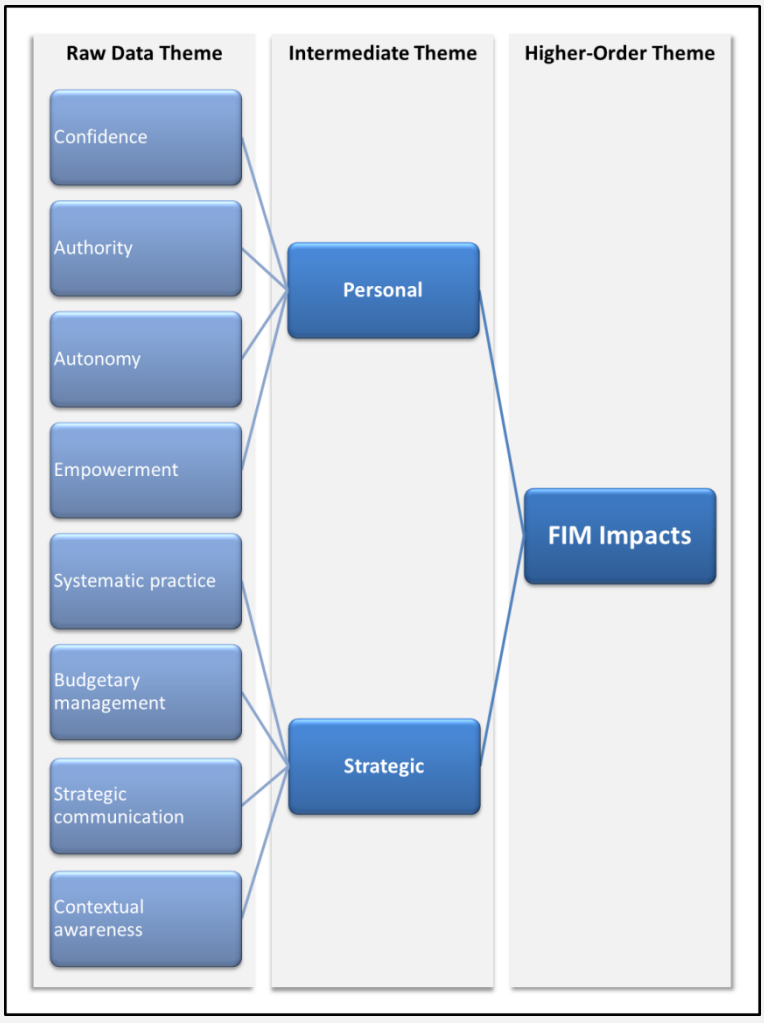
These broad senses of personal empowerment and development were also noted elsewhere with respect to capacity for professional autonomy:

M1: *"She's becoming a lot more autonomous in practice rather than initially always needing to be asked to implement things, or guided or saying this needs to be doing...you know, you could give her a job and say this needs to be doing and then she'd go and do it; now she's coming to me and saying "this is what we need to do"."*

M2: *"[The] objectives really were to be able to empower her really to be an effective team lead and most certainly in the six months I've been working with her she has developed beyond belief, she really has."*

"[M]ost certainly in the six months I've been working with her she has developed beyond belief, she really has."

FIGURE 34: THEME 2 - FIM IMPACTS



"She's able to challenge effectively, and she's been involved in some more strategic things and has actually been nominated to represent certain areas on a strategic group."

Similarly, empowerment came through the adaptation to new roles:

> ***M3:*** *"I think it's been, I guess, quite a life changing journey for him anyway, just because the role is quite different in terms of management responsibility, because I don't think he had management responsibility before and he was put in situations where he was using all sort of different skills. So, yes I think he developed a lot."*

On the strategic side of things, impacts were reported in four distinct areas. The first was in the participants' enhanced capacity to work systematically and transparently at the top of a team:

> ***M2:*** *"She's developed systems and processes to support her in that team lead role, and she's clearly articulated them to all the staff."*

It was also observed that participants were now more skilled in the related fields of strategic communication and organisation within their teams, and also more advanced and reliable in budgetary management:

> ***M1:*** *"She's communicating to staff the standards of how we evidence and document practice, making sure that people are taking responsibility for their own practice and their own supervision. So yes, there's a lot more clarity in the structure of what's going on from an operational point on the ward that previously wasn't there."*

> ***M2:*** *"She's able to challenge effectively, and she's been involved in some more strategic things and has actually been nominated to represent certain areas on a strategic group."*

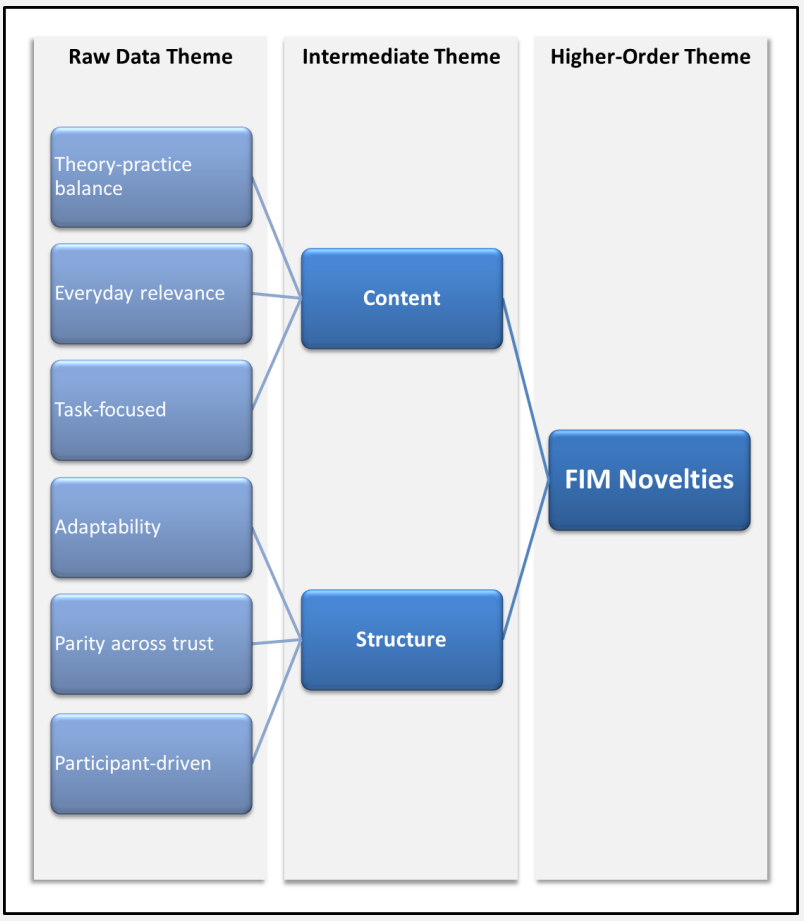
> ***M2:*** *"So she now manages the budget…and she does all the change forms, she keeps me aware, and keeps me informed, but she actually does them. So those are the practical applications I've seen and the change in her."*

Finally, the broad improvement in awareness of institutional context that managers had hoped to see was reported as having become manifest in all cases.

5.3. FIM novelties

Finally, managers reported on what (if anything) they felt had distinguished the FIM programme itself from previous initiatives in the realm. These "novelties" are schematised in Figure 35, and refer to either (a) aspects of FIM content or (b) aspects of FIM structure. While the participating managers did stress that their knowledge of prior initiatives might be "incomplete," they did all claim to have sufficient experience at CPFT (or similar bodies) to make viable comparisons.

FIGURE 35: THEME 3 - FIM NOVELTIES



On issues of content, FIM was singled-out above all for its practicality, relevance to everyday practice and task-focused approach. The effective balance between theory and practical scenarios was seen as central to this:

> ***"I went to the opening day, and I thought the feel was quite different. I think it was a bit more driven by the participants, which is positive."***

> ***M1:*** *"I did the last management course…[and]…there was an awful lot of theory. And that's all great, but sometimes you just want to know if I have a difficult member of staff what do I do? Or if I can't manage this or that, what are we supposed to do? [FIM] has given staff the tools to be able to go do the job rather than just the theory."*

Structurally, meanwhile, the programme was praised for adopting a more flexible and adaptable approach to the business of leadership than previous initiatives. In terms of originality on the grander-scale, however, the more applied nature of the content was seen to have provided for a much more systematic and standardised way of approaching problems:

> ***M2:*** *"This kind of training delivered a consistent approach across the Trust. We've had pockets of excellence [before] where, depending on the manager, they've come up and developed some sort of programme for new managers and they've got the right people involved. But it's always been an ad-hoc basis rather than a consistent approach across the Trust. As I said earlier, what this programme's given to staff either in a management role, or potential management role, is the same learning experience, they've got the same tools at their fingertips so that allows them to be transferable across the organisation."*

Finally, and perhaps surprisingly, the standardising effect of FIM was at no point seen as promoting a didactic model of learning. Indeed, the programme was seen as having been actively more participant-focused than former initiatives:

> ***M3:*** *"I went to the opening day, and I thought the feel was quite different. I think it was a bit more driven by the participants, which is positive."*

5.4. Managerial interviews: summary

With consideration of the managerial interview data discussed above, it is possible to assert the following set of principles:

- Systematic analysis of N=3 interviews with managers of FIM participants yielded three global themes: (a) FIM expectations, (b) FIM impacts, and (c) FIM Novelties.

- Managers reported initial expectations that FIM would help develop participants in terms of everyday managements skills, requisite dispositional traits (e.g. building confidence) and strategic knowledge of CPFT and its processes and structures.
- It was also a reported hope that FIM would help standardise managerial practices across the trust, enhancing the transferability of skills and personnel between services.
- In terms of the impacts actively resultant of FIM, managers observed a wide range thereof in two primary domains: (a) personal impacts (i.e. dispositional changes and upskilling), and (b) strategic impacts (i.e. differences made in the workplace itself).
- All of the more disposition-oriented impacts that managers had previously anticipated regarding FIM were manifest in their post-FIM observations, plus some additional unforeseen benefits.
    - Participants were reported to have become more socially and self-confident, and to be showing greater interpersonal authority.
    - Personal empowerment and development were also noted to have manifested in capacity for professional autonomy.
- On the strategic side of things, impacts were reported in four distinct areas:
    - Participants' had enhanced capacity to work systematically and transparently at the top of a team.
    - Participants were now more skilled in the related fields of strategic communication and organisation within their teams.
    - Participants were more advanced and reliable in budgetary management.
    - Participants exhibited a broad improvement in awareness of institutional context.
- Finally, managers reported on what (if anything) they felt had distinguished FIM programme itself from previous initiatives in the realm. The "novelties" reported refer to either (a) aspects of FIM content or (b) aspects of FIM structure.
- On issues of content, FIM was singled-out above all for its practicality, relevance to everyday practice and task-focused approach.
    - The effective balance between theory and practical scenarios was seen as central to this.
- Structurally, FIM was praised for adopting a more flexible and adaptable approach to the business of leadership than that of previous initiatives.
    - The more applied nature of the content was seen to have provided for a much more systematic and standardised way of approaching problems across the Trust.
    - FIM was also seen as having been actively more participant-focused than prior initiatives.

6. Results V: Participant Survey

Results from four primary zones of analysis are displayed in this section:

i. For each survey, data are analysed to elucidate any significant differences among participants along the lines of demographics and role outlines in terms of how they viewed their life skills and work skills.
ii. For each survey, general self-evaluations are compared to variables compounded from role-specific responses to establish whether participants viewed themselves as, for example, being stronger or weaker communicators in their broader lives than in their professional roles.
iii. For each survey, organisational knowledge of CPFT is described.
iv. Finally, findings from survey 1 and survey 2 are compared to assess key aspects of longitudinal change.

6.1. Participant demographics

Of the total number of participants in the programme (N=100), all were invited to complete to online survey via email. The response rate was 88% in survey 1, and 62% in survey 2, with a demographic breakdown as shown in Table 3:

TABLE 3: CORE POPULATION DESCRIPTION

Variable.	Survey 1		Survey 2	
Gender.	Female= 78 Male = 10	(88.6%) (11.4%)	Female= 56 Male = 6	(90.3%) (9.7%)
Age.	Range = 24 years to 61 years Mean age = **42.3 years**		Range = 25 years to 62 years Mean age = **44.4 years**	
NHS Grade.	Grade 4 = 2 Grade 5 = 6 Grade 6 = 37 Grade 7 = 41 Grade 8 = 2	(2.6%) (6.8%) (42%) (46.6%) (2.3%)	Grade 4 = 2 Grade 5 = 3 Grade 6 = 26 Grade 7 = 28 Grade 8 = 3	(3.3%) (4.8%) (41.9%) (45.2%) (4.8%)

The distribution of roles within this population[3], in terms of part and full time work, years of service and clinical and non-clinical professions, meanwhile, is shown in Table 4 (below):

TABLE 4: PROFESSIONAL ROLE BREAKDOWN

Variable.	Survey 1		Survey 2	
Role status.	Part-time = 24 Full-time = 64	(27.3%) (72.7%)	Part-time = 16 Full-time = 46	(25.8%) (74.2%)
Role type.	Clinical = 62 Non-Clinical = 26	(70.5%) (29.5%)	Clinical = 39 Non-Clinical = 23	(62.9%) (37.1%)
Years worked in NHS.	Range = 1 to 40 years Mean duration of service = **15.84 years**		Range = 3 to 41 years Mean duration of service = **17.50 years**	
Years worked in NHS management.	Range = 0 to 26 years Mean duration of service = **4.49 years**		Range = 0 to 24 years Mean duration of service = **5.34 years**	
Number of people managed by participant.	Range = 0 to 61 persons Mean number managed = **11.36**		Range = 0 to 40 persons Mean number managed = **10.63**	

[3] Although still a perfectly feasible sample from which to draw inference, the lower response rate in the second tranche is likely an output of the mid-summer (i.e. holiday season) timing.

6.2. Tranche 1: Key Findings

Tranche 1 of the FIM participant survey was conducted in September 2012. A more detailed summation of the findings arising from this particular work is available from the authors upon request. Core evaluative findings are, however, outlined below.

6.2.1. Participant differences[4]

1. Gender, job status (full time or part time), job role (clinical or non-clinical), grade, years working in the NHS, years working as a manager and number of people managed had no effect on any of the eleven general characteristics variables (assertiveness, confidence, communicator, listener, good with numbers, time management, dealing with conflict, comfort with change, team-player, independent decision making and respect of authority).
2. Gender, job status (full time or part time), job role (clinical or non-clinical), grade, years working in the NHS, years working as a manager and number of people managed had no effect on any of the nine role characteristics variables (assertiveness, confidence, openness, communication, resource management, satisfaction, conflict management, self-positivity, other-positivity).
3. There were two significant differences between participants who felt they were able to balance managerial and operational and those who were not. People who felt they *were* able to balance these roles scored significantly higher on Professional Communication and Professional Self-Positivity.

In sum, all participants in the survey scored themselves similarly across all general self-evaluations and professional self-evaluations irrespective of gender, age, experience and so forth. However, there were evaluative differences in professional communication and professional self-positivity between those who felt they were able to balance managerial and operational aspects of role (stronger self-assessment) and those who were not (weaker self-assessment).

[4] General self-evaluation variables (n=11) and professional self-evaluation variables (n=9) were checked for normality. As not all variables followed a normal distribution, non-parametric statistics were utilised. Gender, job status, job role and number of years in managerial position effects were considered using Mann Whitney U Tests. Grade, years working in the NHS and number of people managed effects were considered using Kruskall-Wallis H tests. The accepted alpha level was adjusted using a Bonferonni correction, (0.05 / number of comparisons). In most cases this was 0.05/ 20 = 0.003.

6.2.2. Self-evaluation vs. role-evaluation[5]

1. No significant differences were found in confidence or assertiveness.
2. Participants scored themselves higher on communication, resource management, satisfaction, conflict management, self-positivity and other-positivity in general life than in their professional roles.
3. Conversely, participants scored themselves more poorly on openness in general than in their professional roles. All results are displayed graphically in Table 5.

TABLE 5: SELF-EVALUATION VS. ROLE-EVALUATION, PRE-FIM

Aptitude.	Stronger in General	No Significant Difference	Stronger in Role
1. Assertiveness		X	
2. Confidence		X	
3. Openness			X
4. Communication	X		
5. Resource Management	X		
6. Satisfaction	X		
7. Conflict management	X		
8. Self-Positivity	X		
9. Other-Positivity	X		

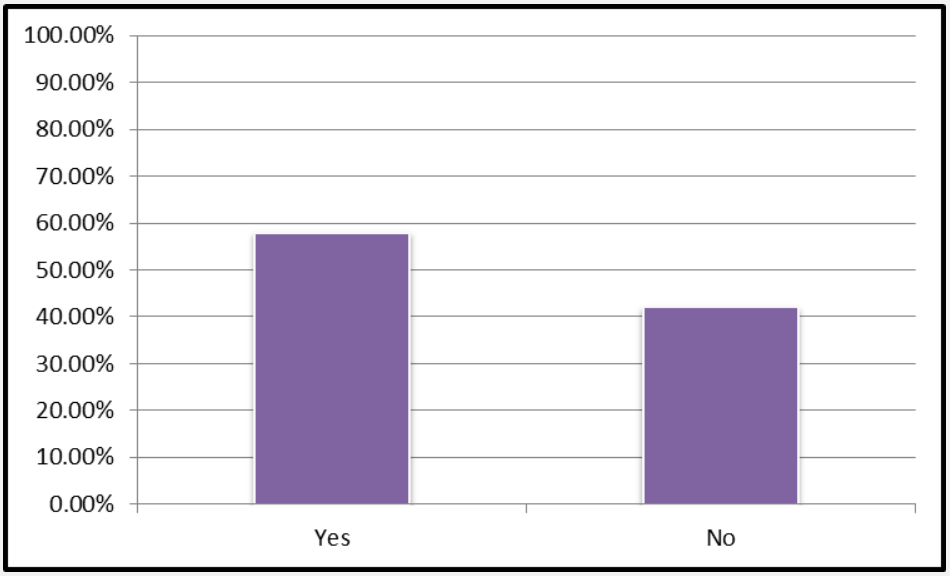
In sum, findings reveal participants scoring themselves more highly on general self-evaluation scores in six out of ten comparisons to professional self-evaluation scores. While confidence and assertiveness ratings did not vary between personal and professional situations, participants reported a greater capacity for openness in their professional roles than in broader life.

Additionally, participants were asked to assess their ability to balance their working roles (i.e. the managerial and the operational aspects of their job) via the simple Yes/No question "Do you

[5] General self-evaluation variables (n=11) and professional self-evaluation variables (n=9) were checked for normality. As not all variables followed a normal distribution, non-parametric two-related variable tests (Wilcoxon matched-pair signed-rank test) were used to compared differences between self-scores and role-scores. The accepted alpha level was adjusted using a Bonferonni correction, (0.05 / number of comparisons) which reduced the accepted significance level to $p<0.005$ (0.05/10).

feel that you are able to effectively balance the operational and managerial aspects of your role?" As evident in Figure 36, a just over half of the participants (57.95%) felt that they could, while a sizeable minority (42.05%) felt they could not.

FIGURE 36: ROLE BALANCE, PRE-FIM



6.2.3. Organisational knowledge

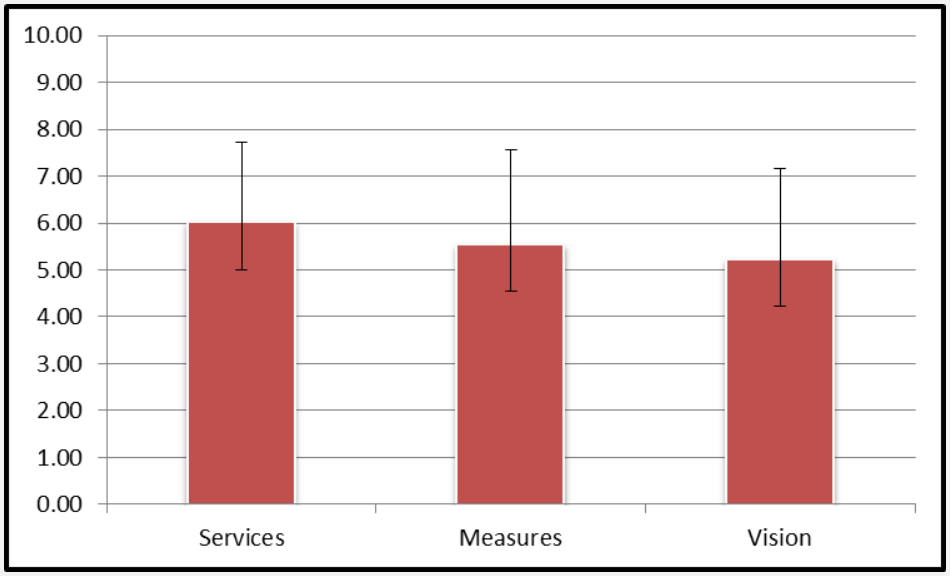
Participants rated their organisational knowledge in three areas on a scale of 1 (very poor) to 10 (very good):

1. Understanding of services within CPFT;
2. Understanding of Quality performance measures used within CPFT, and;
3. Understanding of CPFT's Organisational vision, strategy and business plans.

The mean self-ratings allocated for each of the knowledge matters outlined above are illustrated in Figure 37. Herein, it is apparent that knowledge of CPFT's services (mean=6.01) is seen to be that in which participants are most have the most confidence, with measures and vision both between 5 and

6. Participants' ratings in all three domains clustered around the mid-scale, with diminishing numbers rating their knowledge in the higher and lower echelons.

FIGURE 37: ORGANISATIONAL KNOWLEDGE RATINGS, PRE-FIM[6]



There were no variations in knowledge ratings according to gender, age, experience, full-time or part-time status, or number of people managed. However, there was a significant difference between clinical and staff and non-clinical staff, with the latter rating their knowledge in all three domains more highly.

6.3. Tranche 2: key findings

The second tranche of the FIM participant survey was conducted in July 2013, shortly after the completion of the programme itself. Core evaluative findings are outlined below.

[6] Error bars denote standard deviation.

6.3.1. Participant differences[7]

1. Gender, job status (full time or part time), job role (clinical or non-clinical), grade, years working in the NHS, years working as a manager and number of people managed had no effect on any of the eleven general characteristics variables (assertiveness, confidence, communicator, listener, good with numbers, time management, dealing with conflict, comfort with change, team-player, independent decision making and respect of authority).
2. Gender, job status (full time or part time), job role (clinical or non-clinical), grade, years working in the NHS, years working as a manager and number of people managed had no effect on any of the nine role characteristics variables (assertiveness, confidence, openness, communication, resource management, satisfaction, conflict management, self-positivity, other-positivity).
3. There were no statistical differences between people who have changed jobs and people that have not in any of the 20 primary variables.

In sum, all participants in the survey scored themselves similarly across all general self-evaluations and professional self-evaluations irrespective of gender, age, experience and so forth.

6.3.2. Self-evaluation vs. role-evaluation[8]

1. No significant differences were found in confidence, communication and other-positivity.
2. Participants scored themselves significantly more highly on assertiveness, self-positivity, openness and satisfaction in their professional roles than in general life.

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[7] Self-characteristic variables (n=11) and role-characteristic variables (n=9) were checked for normality. As not all variables followed a normal distribution, non-parametric statistics were utilised. Gender, job status, job role and number of years in managerial position effects were considered using Mann Whitney U Tests. Grade, years working in the NHS and number of people managed effects were considered using Kruskall-Wallis H tests. The accepted alpha level was adjusted using a Bonferonni correction, (0.05 / number of comparisons). In most cases this was 0.05/ 20 = 0.003.

[8] Self-characteristic variables (n=11) and role-characteristic variables (n=10) were checked for normality. As not all variables followed a normal distribution, non-parametric two-related variable tests (Wilcoxon matched-pair signed-rank test) were used to compared differences between self-scores and role-scores. The accepted alpha level was adjusted using a Bonferonni correction, (0.05 / number of comparisons) which reduced the accepted significance level to $p<0.005$ (0.05/10).

3. Participants scored themselves more significantly more highly on conflict management and resource management in general life than in professional role. All results are graphically displayed below, in Table 5.

TABLE 6: SELF-EVALUATION VS. ROLE-EVALUATION, POST-FIM

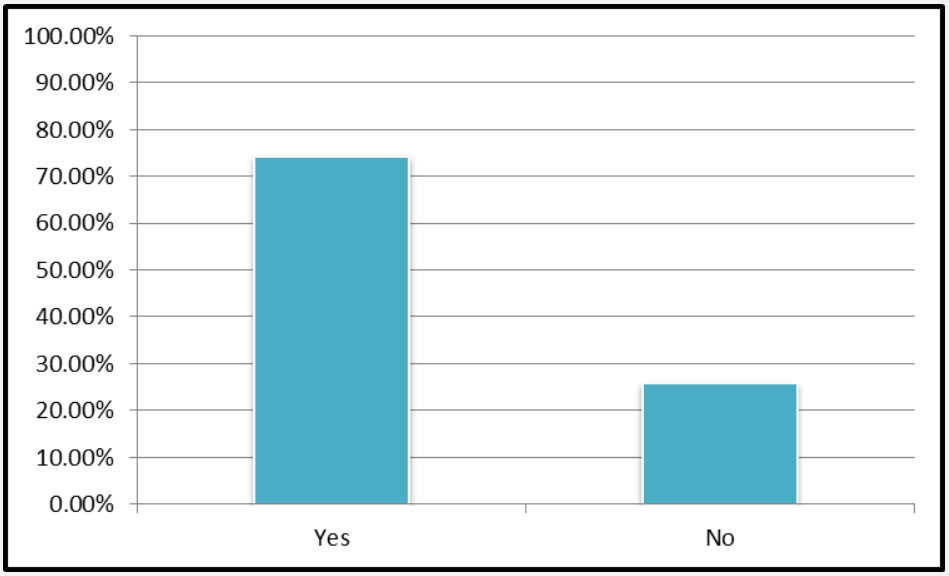
Aptitude.	Stronger in General	No Significant Difference	Stronger in Role
1. Assertiveness			X
2. Confidence		X	
3. Openness			X
4. Communication		X	
5. Resource Management	X		
6. Satisfaction			X
7. Conflict management	X		
8. Self-Positivity			X
9. Other-Positivity		X	

Findings reveal participants scoring themselves more highly on professional self-evaluation scores in five out of nine comparisons to general self-evaluation scores.

While confidence, communication and other-positivity ratings did not vary between personal and professional situations, participants felt more competent at managing conflict and resources in their non-professional lives than at work.

Participants were also asked to assess their ability to balance their working roles. Figure 38 evidences that nearly three quarters of the participants (74.19%) now felt that they could:

FIGURE 38: ROLE BALANCE, POST-FIM



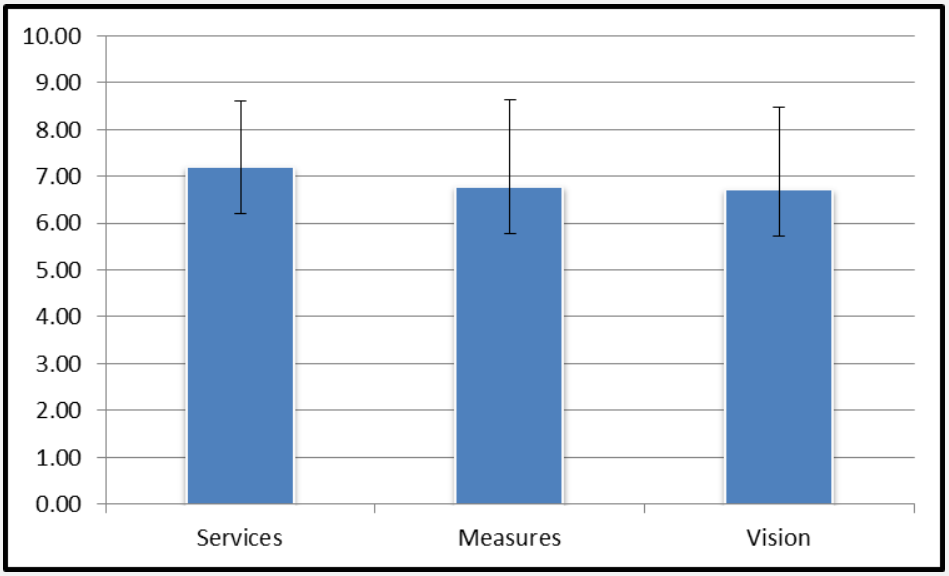
6.3.3. Organisational knowledge

Participants rated their organisational knowledge in three areas on a scale of 1 (very poor) to 10 (very good):

1. Understanding of services within CPFT;
2. Understanding of Quality performance measures used within CPFT, and;
3. Understanding of CPFT's Organisational vision, strategy and business plans.

The mean self-ratings allocated for each of the knowledge matters outlined above are illustrated in Figure 39 (below). Herein, it is apparent that knowledge of CPFT's services (mean=7.19) is seen to be that in which participants are most have the most confidence, with measures and vision both between 6.5 and 7. Participants' ratings in all three domains clustered around the mid-scale, with diminishing numbers rating their knowledge in the higher and lower echelons. There were no variations in knowledge ratings according to gender, age, experience, full-time or part-time status, clinical or non-clinical role, or number of people managed.

FIGURE 39: ORGANISATIONAL KNOWLEDGE, POST-FIM[9]



6.4. Comparative findings

Core evaluative findings drawn from direct comparison of data from the two tranches are outlined below.

6.4.1. Aptitude comparison

Comparisons between the tranche 1 and tranche 2 survey findings in this domain are displayed in Table 7 (below). It should be noted that none of the "general" self-ratings were significantly different between the two surveys; as such, they provide a consistent baseline against which change can be observed.

[9] Error bars denote standard deviation.

TABLE 7: SELF-EVALUATION VS. ROLE-EVALUATION – COMPARISON

Aptitude.	Stronger in General	No Significant Difference	Stronger in Role
1. Assertiveness		X	X
2. Confidence		XX	
3. Openness			XX
4. Communication	X	X	
5. Resource Management	XX		
6. Satisfaction	X		X
7. Conflict management	XX		
8. Self-Positivity	X		X
9. Other-Positivity	X	X	

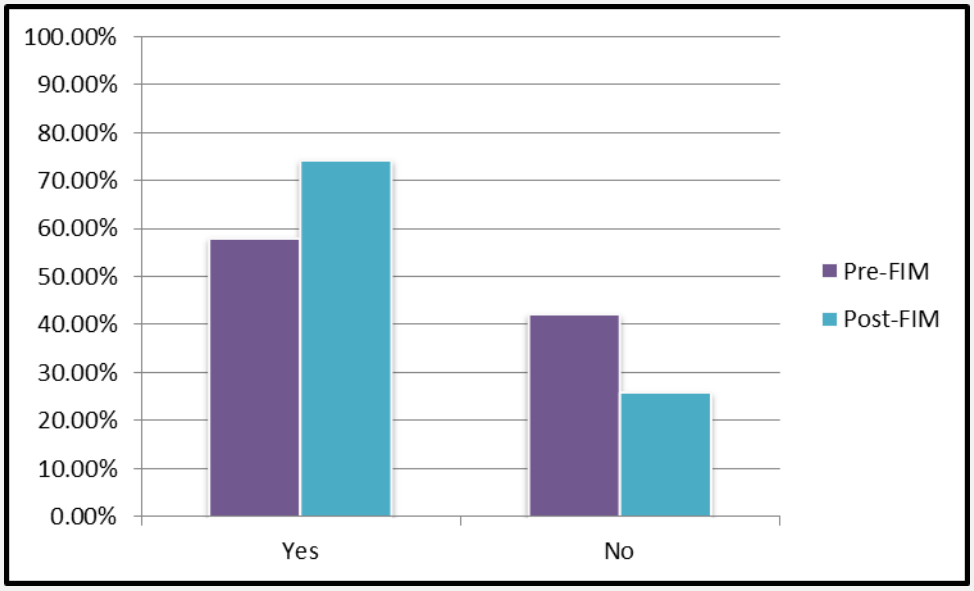
X = Tranche 1; X = Tranche 2

These findings are particularly striking, indicating that during the course of FIM five of the key measures moved rightwards across the table, while the two already on the right remained unchanged. In the cases of self-positivity and satisfaction, the measures moved all the way across the table. Participants in tranche 1 were more satisfied and positive about themselves in general; in tranche 2, they were now more so at work. Only confidence (no significant difference), and resource management and conflict management (stronger in general) remained unchanged when changes were possible. It should be further noted that these measures did not trend with any key demographic variables but, when exploring change-over-time, there is no reason to suspect that they would.

A tranche-to-tranche comparison of role-balance assessments (i.e. participants' capacity to balance managerial and operational aspects of their roles), meanwhile, can be seen in Figure 40 (below). It is clearly evident herein that a significant shift in this aptitude took place during the course of FIM, with a substantially greater proportion of the participant sample (79.19%) viewing themselves as capable of this balance post-FIM than did so beforehand (57.95%)[10].

[10] As a (literal) footnote to these findings, one should, of course, exercise caution when approaching any uncontrolled survey statistics, being mindful of key issues of internal validity. These findings discussed above show that, while participants remained stable in their general self-assessments, their workplace-based self-assessments improved substantially (and in some cases dramatically) *during the course* of FIM. These improvements were widespread across the whole diverse cohort, which indicates that FIM itself was a major

FIGURE 40: ROLE BALANCE - COMPARISON



6.4.2. Knowledge comparison

Comparing knowledge-related findings between the tranche 1 and tranche 2 results revealed significant improvements in all three of the domains below:

1. Understanding of services within CPFT;
2. Understanding of Quality performance measures used within CPFT, and;
3. Understanding of CPFT's Organisational vision, strategy and business plans.

As further evidenced in Figure 41, these improvements are relatively substantial. In terms of knowledge of services within CPFT, for example, the mean self-rating rises from 6.01 to 7.19; a relative increase of very nearly 20%. Knowledge of measure and organisational vision, meanwhile, show relative improvements of an even greater order (22.4% and 28.3% respectively).

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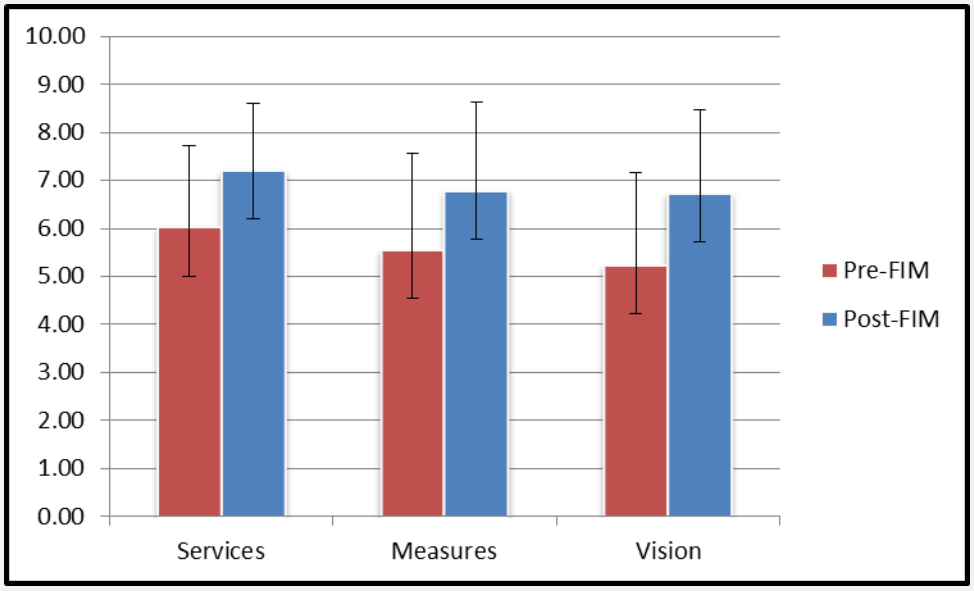
factor in this improvement. It does not, however, preclude the possibility that a range of other factors were in play at the same time, with their own effects on participant aptitudes.

It should be further noted that, like the aptitude measure, these knowledge measures did not trend with any key demographic variables, but (and again) when exploring change-over-time, there is no reason to suspect that they would.

FIGURE 41: ORGANISATIONAL KNOWLEDGE - COMPARISON[11]



6.5. Survey: summary

With consideration of the two tranches of survey data discussed above, it is possible to assert the following set of principles:

- Two tranches of survey data were collected, one at the very beginning of FIM (**N=88** participants) and another (mirror) tranche after its completion (**N=62** participants), to facilitate assessment of longitudinal change.
- Participants were asked to self-rate in terms of confidence, assertiveness, communication skills, openness, resource management skills, personal satisfaction, conflict management, positivity in self-image and positivity in how one is seen by others.

[11] Error bars denote standard deviation.

- At the beginning of FIM, the participants overwhelmingly rated their skills and aptitudes as stronger in general life than in their professional roles.
- Only openness was deemed stronger in the workplace.
- Assertiveness and confidence were rated as roughly equivalent in both domains.
- At the end of FIM, only resource management and conflict management were rated more strongly outside of the workplace, with confidence, communication skills and positivity showing no overall difference between domains. All other aptitudes were now rated more highly in the workplace.
- These aptitude changes did not trend with any key demographic variables.
- Thus, workplace-based assertiveness, communication skills, personal satisfaction, conflict management, positivity in self-image and positivity in how one is seen by others all improved across the course of FIM.
- A significant shift in capacity to balance managerial and operational aspect of role took place during the course of FIM.
- A substantially greater proportion of the participant sample (79.19%) achieved this balance post-FIM than did so beforehand (57.95%).
- Participants were also asked to rate their knowledge and understanding of CPFT's organisational structure pre- and post-FIM.
- Areas investigated were (a) understanding of services within CPFT, (b) understanding of quality performance measures used within CPFT, and (c) understanding of CPFT's organisational vision, strategy and business plans.
- Pre-FIM, participants rated their knowledge of CPFT's services (mean=6.01) most highly, with measures and vision both rated between 5 and 6.
- There were no variations in knowledge ratings according to gender, age, experience, full-time or part-time status, or number of people managed.
- There was a significant difference between clinical and staff and non-clinical staff, with the latter rating their knowledge in all three domains more highly.
- Post-FIM ratings increased significantly in all three domains.
- In terms of knowledge of services within CPFT, the mean self-rating rose to 7.19; a relative increase of very nearly 20%. Knowledge of measure and organisational vision, meanwhile, show relative improvements of an even greater order (22.4% and 28.3% respectively).
- These knowledge changes did not trend with any key demographic variables.

7. Impact Analysis

In this section, findings relating only to *direct impacts* of the FIM programme are summarised for convenient reference, and synthesised into a single figure to guide the thematic exploration of key issues advanced in the conclusion.

7.1. Session evaluation findings

- Participants identified a number of themes they would take home from the day, not least the need to **think holistically** about leadership within the trust, the need to **plan effectively** and the value of **proactivity**.
- Following the day, participants reported **increased confidence** around their roles and a greater **ease around the notion of upper-management**.
- Participants reported feeling more **self-aware**, **confident** and **assertive** as a result of what they had learned, and expected to be more **reflective** in their roles, and **readier to delegate**.
- Participants reported feeling more **confidence to challenge "common knowledge"** in the working world, a greater comfort with CPFT's structures and organisation, more basic **confidence in their own role** and a **decreased anxiety level around organising budgets and finances**.
- Participants reported feeling more **motivated around their roles** following involvement in the day, more **confident about future interactions** with the people they manage, **less afraid of conflict** and **more enthusiastic about the future changes in CPFT**.
- Participants reported that they felt better equipped to cope with change, **motivated to try out the new tools** with which they had been equipped, **more confident as leaders in general** and that their **capacity for empathy and understanding had been enhanced**.

7.2. Participant interview findings

- Participants reported **strong knowledge-transfer** and the **sharing of best-practice** within the FIM cohort itself. Participants reported having engineered **new links across CPFT** itself as a direct result of their work within FIM.

- In terms of direct workplace impacts, **new (team)working strategies** and had been brought about following absorption of FIM materials.
- **Stronger empathy** with others, and consequently **more confident capacities for communication** and the **management of conflict**, were reported.
- Better understandings of **budget situations** and **management** were also a recurrent theme.
- Participants reported a much **stronger sense of the Trust's structures**, and also a much **better understanding of their own place within it**.
- In terms of participant **upskilling**, meanwhile, stronger capacity for **listening** was recurrently noted by participants. **Better capacity to deal with stress** was also reported, as were **improved time and workload management skills**.
- A better **understanding of leadership styles** and techniques (and especially the use of the MBTI) effected a more **generally skilled**, **sensitive** and above all **confident** approach to leading teams.
- A **greater confidence (even faith) in the trust and its vision/directions** was reported as an output of FIM, and particularly the first day thereof. Greater ***self*-confidence** was also reported by several participants.
- Connected closely to confidence for FIM participants was the issue of **positivity**, particularly that about their own future and that of the trust.
- A number of participants reported a FIM-driven movement towards a more **realistic** and **reflective** working self; in short, they adopted a more **careful**, **structured** and **inclusive** approach to their role and interactions with others.
- Several participants reported a newly-found **enthusiasm** for **learning**, which would translate into more engagement with materials from FIM itself, or engagement with new training programmes.
- Participants reported sustained hope that **greater understanding and cooperation** would be fostered within and between teams.
- This awareness was also responsible for fostering worries in three areas: (a) a stronger understanding of the **weight of expectation** upon leaders, (b) knowing "**how little you actually know**" about management and leadership and (c) coming to understand **the sheer range of personality types, and personal needs, within any team**.

7.3. Managerial interview findings

- In terms of the impacts actively resultant of FIM, managers observed a wide range thereof in two primary domains: (a) personal impacts (i.e. **dispositional changes** and **upskilling**), and (b) strategic impacts (i.e. differences made in the **workplace** itself).
- All of the more dispositionally-oriented impacts that managers had previously anticipated regarding FIM were reported as manifest in their post-FIM observations, as were some additional unforeseen benefits.
    - Participants were reported to have become more **socially confident and self-confident**, and to be showing greater **interpersonal authority**.
    - Personal **empowerment and development** were also noted to have manifested in capacity for **professional autonomy**.
- On the strategic side of things, impacts were reported in four distinct areas:
    - Participants' had **enhanced capacity to work systematically and transparently** at the top of a team.
    - Participants were now more skilled in the related fields of **strategic communication** and **organisation** within their teams.
    - Participants were more **advanced and reliable in budgetary management**.
    - Participants exhibited a broad improvement in **awareness of institutional context**.

7.4. Participant survey findings

- Participants were asked to self-rate in terms of confidence, assertiveness, communication skills, openness, resource management skills, personal satisfaction, conflict-management, positivity in self-image and positivity in how one is seen by others.

- Workplace-based **assertiveness, communication skills, personal satisfaction, conflict management, positivity in self-image and positivity in how one is seen by others** all improved across the course of FIM.

- A statistically significant shift in **capacity to balance managerial and operational aspect of role** took place during the course of FIM. A substantially greater proportion of the participant sample (79.19%) achieved this balance post-FIM than did so beforehand (57.95%).

- Participants were also asked to rate their knowledge and understanding of CPFT's organisational structure pre- and post-FIM. Areas investigated were (a) understanding of services within CPFT, (b) understanding of quality performance measures used within CPFT, and (c) understanding of CPFT's organisational vision, strategy and business plans.
- There was a significant difference between clinical and staff and non-clinical staff, with the latter rating their knowledge in all three domains more highly.
- Post-FIM ratings increased significantly in all three domains. In terms of **knowledge of services** within CPFT, the mean self-rating rose to 7.19; a relative increase of very nearly 20%. **Knowledge of measures** and **organisational vision**, meanwhile, show relative improvements of an even greater order (22.4% and 28.3% respectively).
- The gap between clinical and non-clinical staff had closed.

7.5. Impact synthesis

In Figure 42 (overleaf), impact-oriented keywords assembled throughout the collected data and subsequent analysis are schematised in Wordle form. For the sake of clarity, similar topics are grouped into single word-statements. Thus, for example, all statements pertaining to better understanding of others in practice are now grouped under "empathy," while all statements relating to enhanced faith in the future are now grouped as "optimism."

Consideration of this figure reveals four cross-cutting meta-themes that consistently appear in all four forms of data collected. These are:

5. Institution, knowledge and networks;
6. Personalities, empathy and the MBTI;
7. Communication and conflict-management, and;
8. Confidence, motivation and optimism.

As a final stage in this evaluation, these themes are analytically explored in Section 8.

FIGURE 42: FIM IMPACT WORDLE

8. Conclusions

In this final section, the four key cross-cutting meta-themes emergent of the analytic syntheses in Section 7 are examined further, alongside a short reflection on the training feedback. The core focus herein is, as will be apparent, upon broad issues that incorporate both manifest and "latent" (i.e. possibly unexpected or unforeseen) impacts of FIM from a participant-centred perspective.

8.1. FIM training

In any initiative with around 100 participants from diverse clinical and non-clinical roles, and delivered across multiple sites, there will always be a challenge in maintaining consistency, topical relevance and the correct level of pitch. Given the heterogeneity of the participant sample, it is therefore perhaps surprising how scarcely complaints relating to the level and focus of the training occur in the data corpus. Clearly, one of the major successes of the FIM programme thus far has been in "finding the level" appropriately. Some participants felt generally out-of-their-depth on Day 1; there was also feedback that the budgeting session on Day 3 was both too complex and too simplistic. This reflects the rather specialised character of budget management. There were some matters voiced relating to parts of the programme being more oriented to work within adult care services than those for children, and also that some sessions were pitched too much towards mental health professionals at the expense of others. It would be surprising, however, if any such initiative could please every single professional in a large audience, and the fact that there was broad statistical and qualitative agreement that the pitching throughout FIM was highly effective - despite the obstacles – is a huge success.

Similarly successful were the reported levels of relevance. To provide materials that are concurrently relevant to all members of a cohort such as that participating in the FIM is an achievement, and the levels of complaint regarding irrelevant content recorded in this evaluation are negligible. The budgeting session on Day 3 was not seen as relevant by some; however, other topics such as workforce planning were either (a) not seen as relevant to a current role, but likely to be useful in the future, or (b) not likely to be role-relevant, but interesting all the same. The capacities to enthuse the technically uninvolved, and to stimulate forward-looking thought on the issues within a programme, should also be seen as substantial successes.

8.2. Institution, knowledge and networks

Central to the reported impacts of FIM were greater connections to CPFT as an organisation, and the people within it. The FIM programme was reported to have (a) demystified and humanised upper management (i.e. given the instution a "face"); (b) given participants a much stronger sense of the organisation's goals and vision; (c) helped them understand their own place within the organisational structure; and (d) helped them forge supportive networks both from other participants in FIM itself, but also with others outside as a result of the training received. In short, FIM made a contribution to enhanced integration within CPFT itself, and greater inter-team cooperation and understanding, which in turn helped forge greater confidence, motivation and optimism (see section 8.5). These qualitative statements arising from participants' session feedback and interviews were supported by the managers, and also demonstrated within the survey.

8.3. Personalities, empathy and the MBTI

Issues of cooperation and understanding were not limited to the structural level. One of the most commonly-cited pieces of topical feedback by participants in FIM was the enormous popularity of the work on leadership styles and personality types, not least the use of the MBTI. Participants reported greater levels of self-awareness, and greater ability to empathise with - and understand - others in the workplace (and elsewhere). This was taken to have had further positive impacts on team dynamics and general working harmony, and also upon capacities for creative communication and effective conflict management (see section 8.4).

8.4. Communication and conflict-management

Although the governing issue of confidence (see section 8.5) was a key factor in improved communication skills, improved communication and conflict management within teams was more commonly seen as a strongly linked to better understanding of personnel and personalities; i.e. empathy (see section 8.3). To these ends the focus of FIM on these matters, and once again the highly-praised inclusion of the MBTI, were not only popular parts of the programme (as evidenced in the session feedback), but highly practical ones (as evidenced in all other data formats). Participants

reported feeling less afraid of conflict, more prepared for difficult conversation and more capable of getting their point across to superiors and subordinates.

8.5. Confidence, motivation and optimism

Far and away the most consistently-raised theme within all of the evaluation data collected is that of confidence. Participants reported feeling more confident, post FIM, in a range of domains. For example:

- In communication;
- In conflict management;
- In handling budgets and resources;
- In leading teams;
- In problem-solving;
- In challenging the status-quo;
- In looking to the future, and;
- In looking at themselves as professionals.

This, at the personal level, was often linked by participants to increased motivation. At the macro-level, meanwhile, feeling more confident about the organisation and their own place within it tended to engender optimism.

8.6. Final impact statement

Reviewing the manifest aims FIM (see section 1) and the evaluation impact data collected (see section 7 for a recap), it is clear that – insofar as the remit of the evaluation permits – the programme has either achieved, or is well on the way to achieving, all of them. Moreover, there has been a secondary raft of latent impacts evidenced from the qualitative data and elucidated above, which are equally worthy of celebration.

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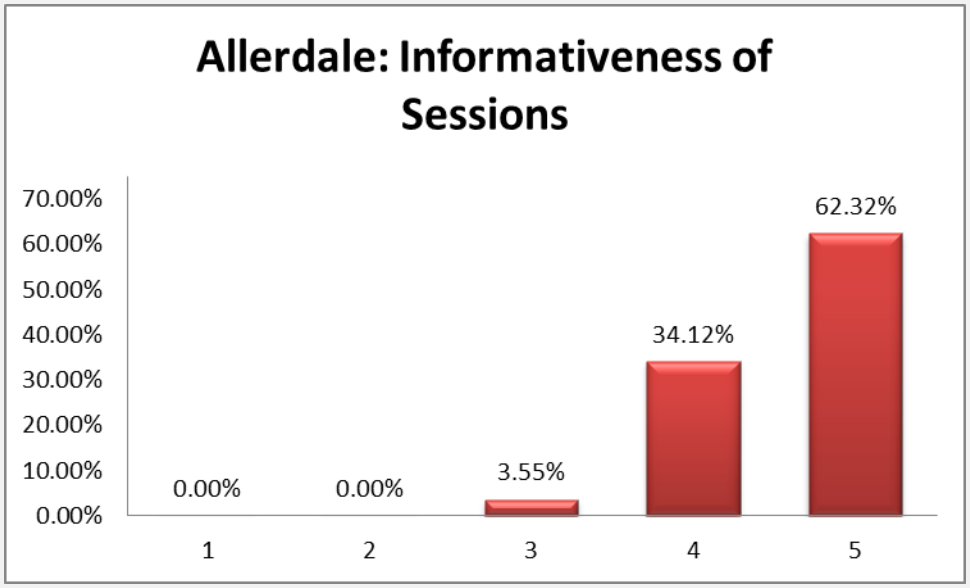
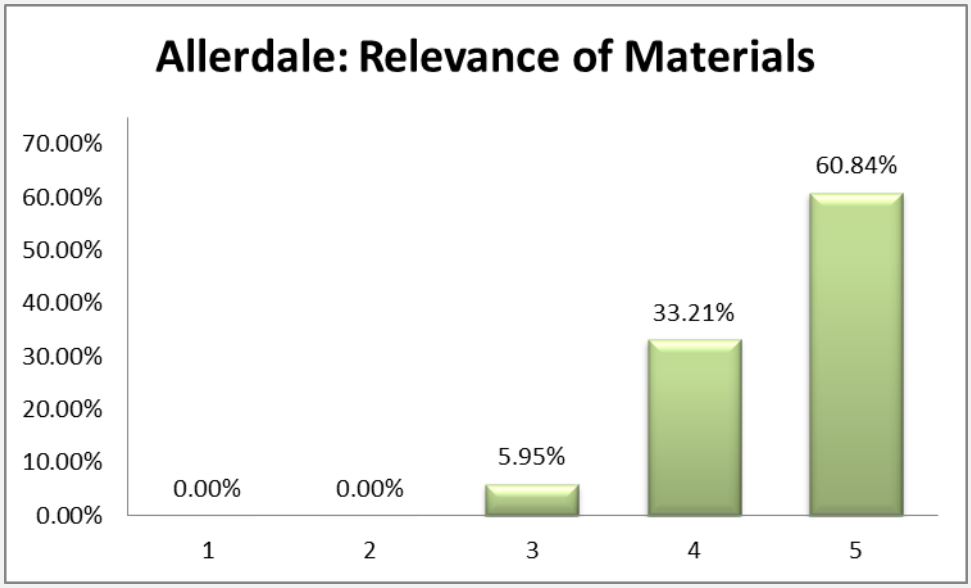
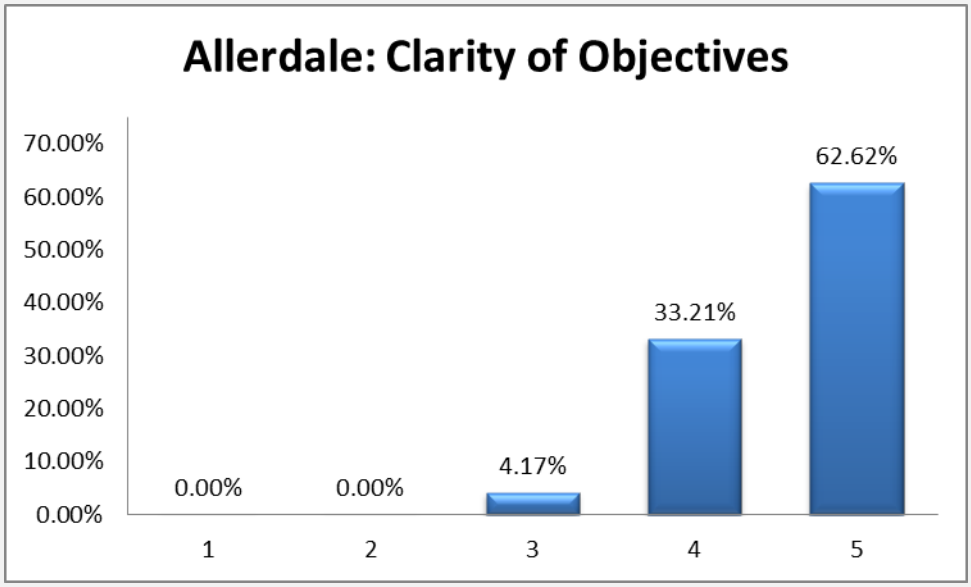
Appendix 1: Full Quantitative Session Evaluations by Location

A1.1. Allerdale






Allerdale: Clarity of Objectives
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60.00%
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20.00%
10.00%
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4.17%
33.21%
62.62%
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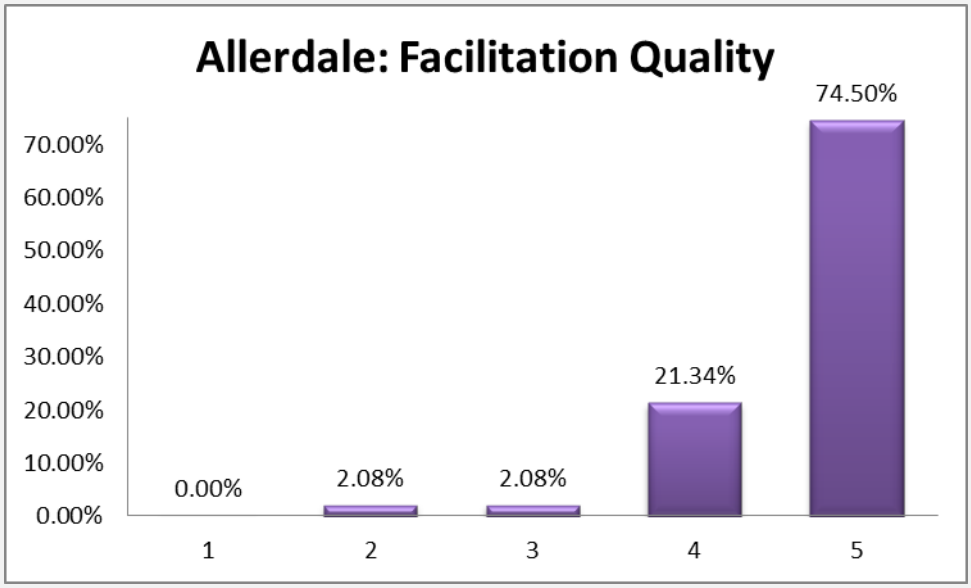
Allerdale: Facilitation Quality
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60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
2.08%
2.08%
21.34%
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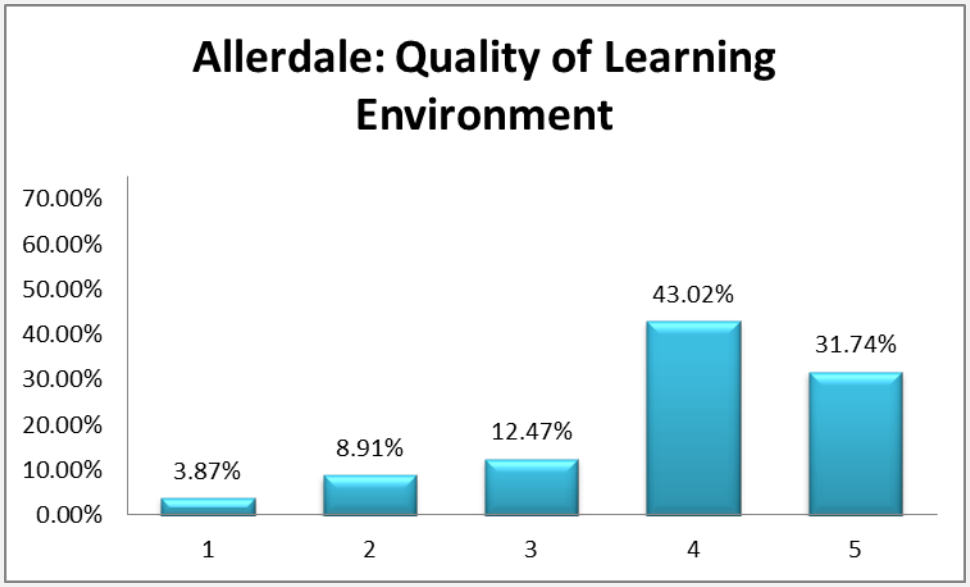
Allerdale: Quality of Learning Environment
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40.00%
30.00%
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8.91%
12.47%
43.02%
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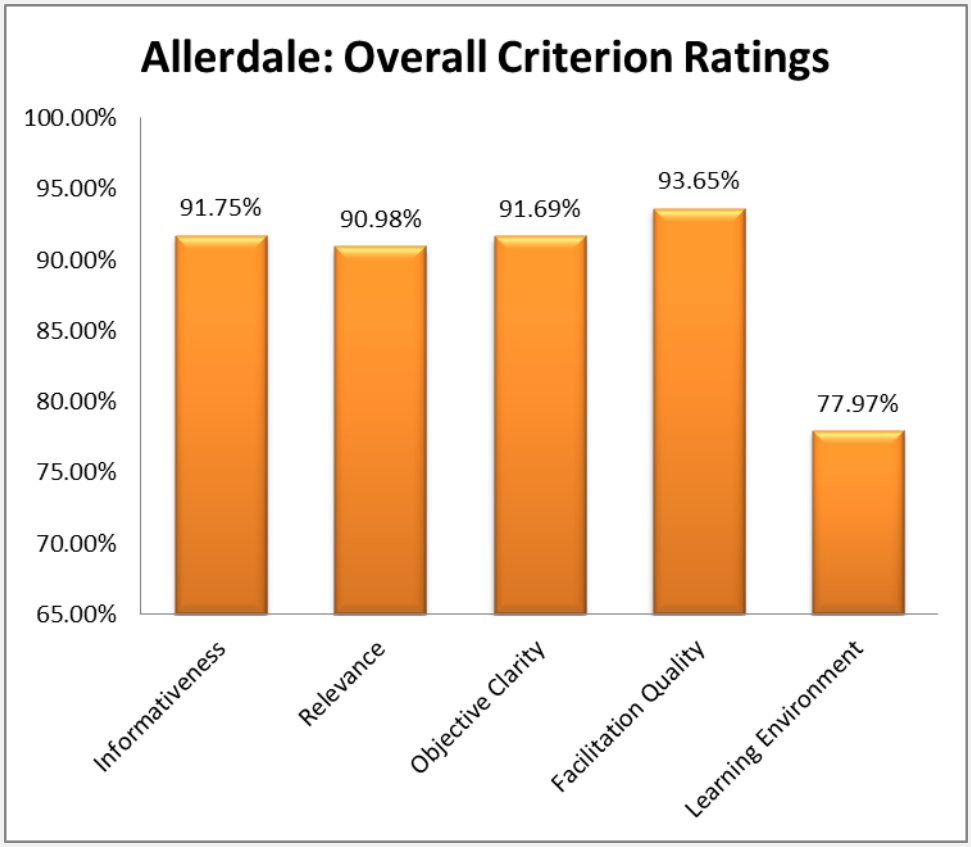
Allerdale: Overall Criterion Ratings
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90.00%
85.00%
80.00%
75.00%
70.00%
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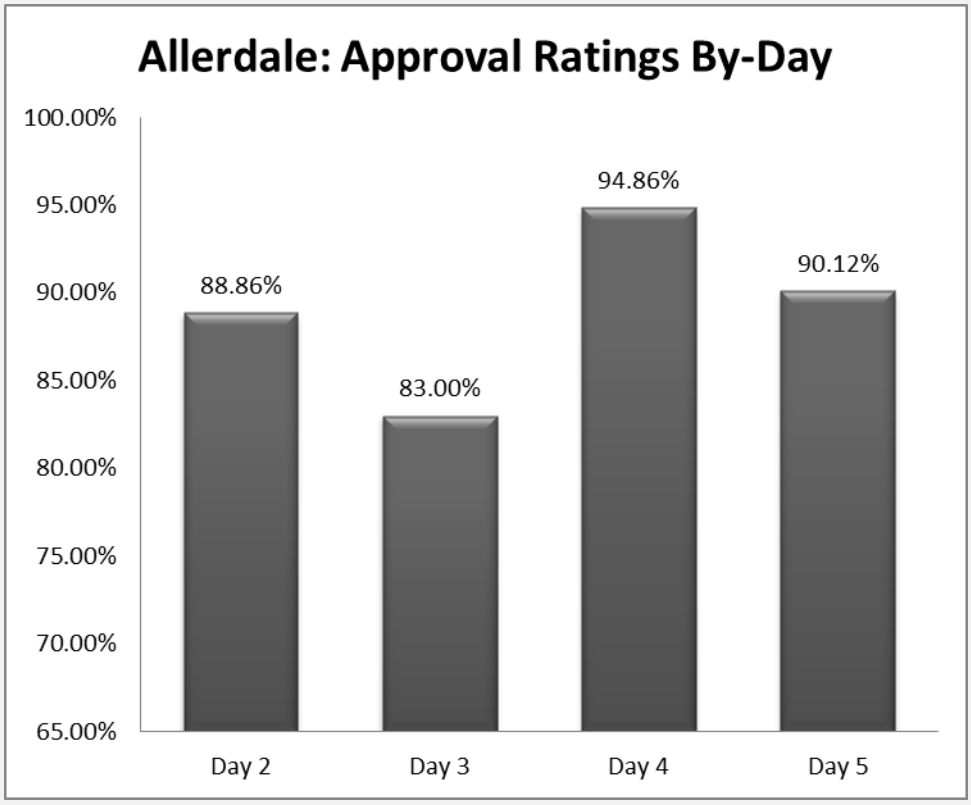
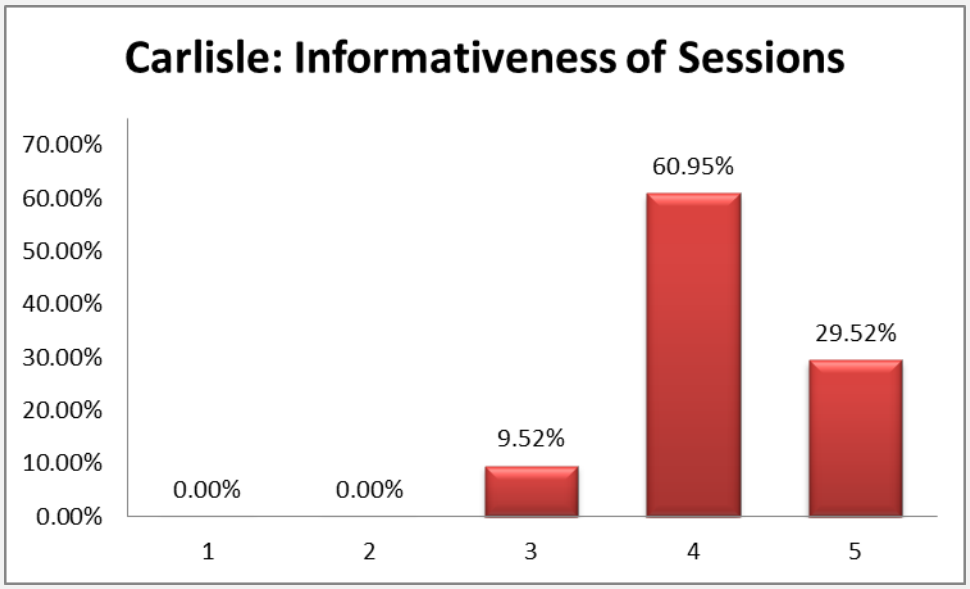
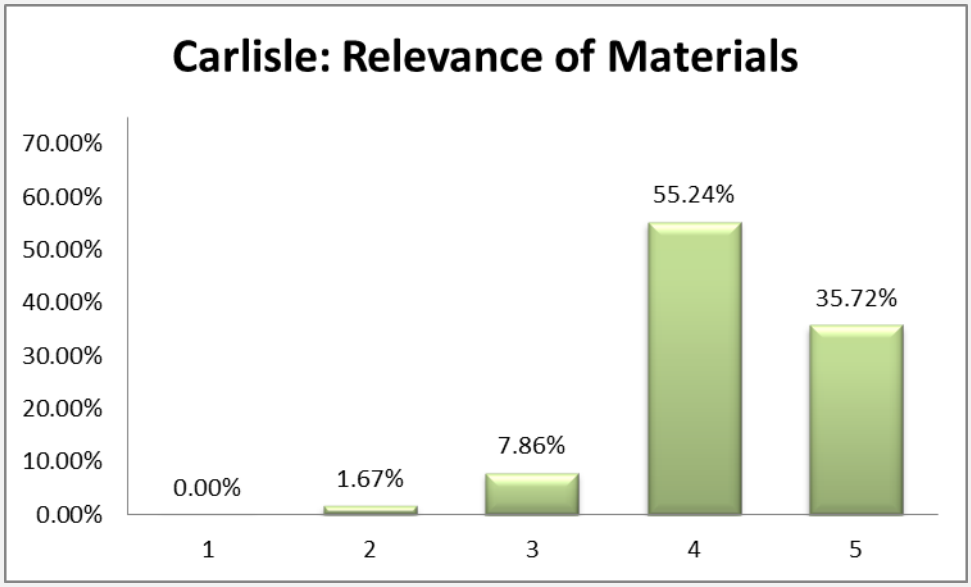
91.69%
93.65%
77.97%
Informativeness
Relevance
Objective Clarity
Facilitation Quality
Learning Environment



A1.2. Carlisle




Carlisle: Relevance of Materials
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60.00%
50.00%
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30.00%
20.00%
10.00%
0.00%
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1.67%
7.86%
55.24%
35.72%
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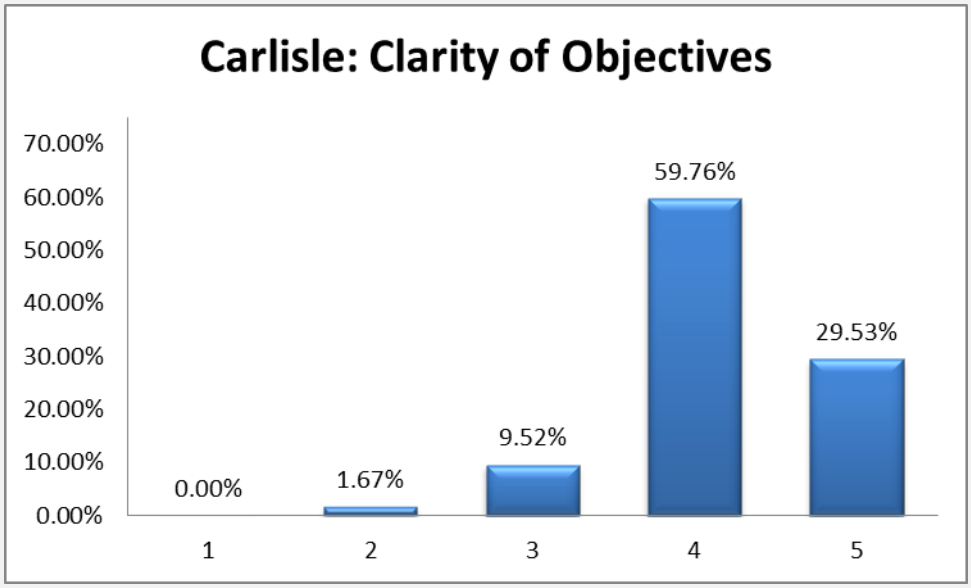
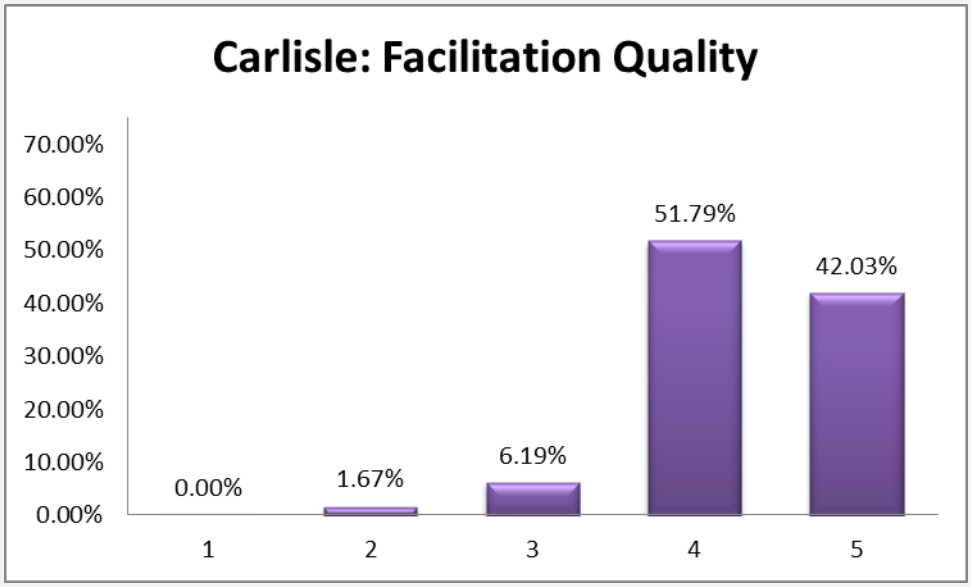
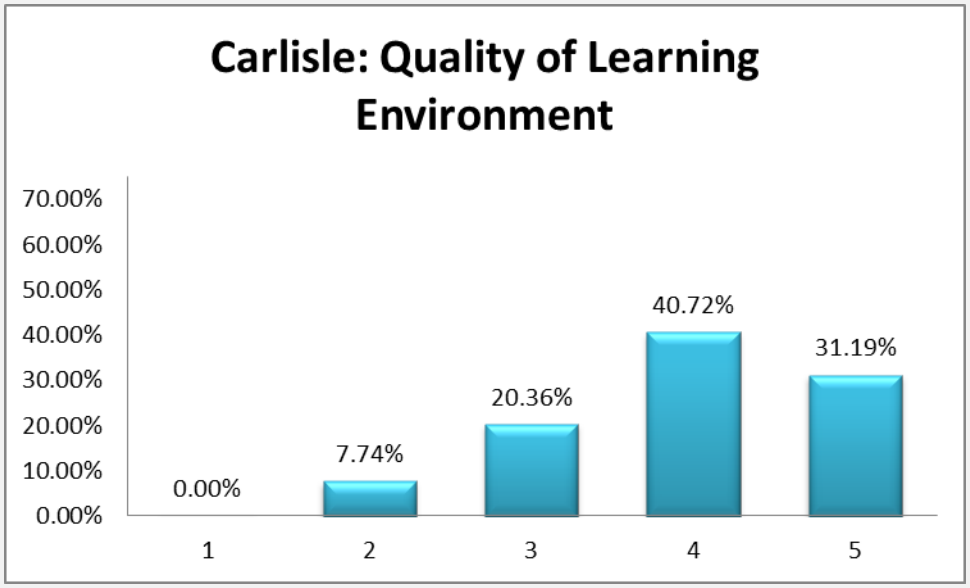
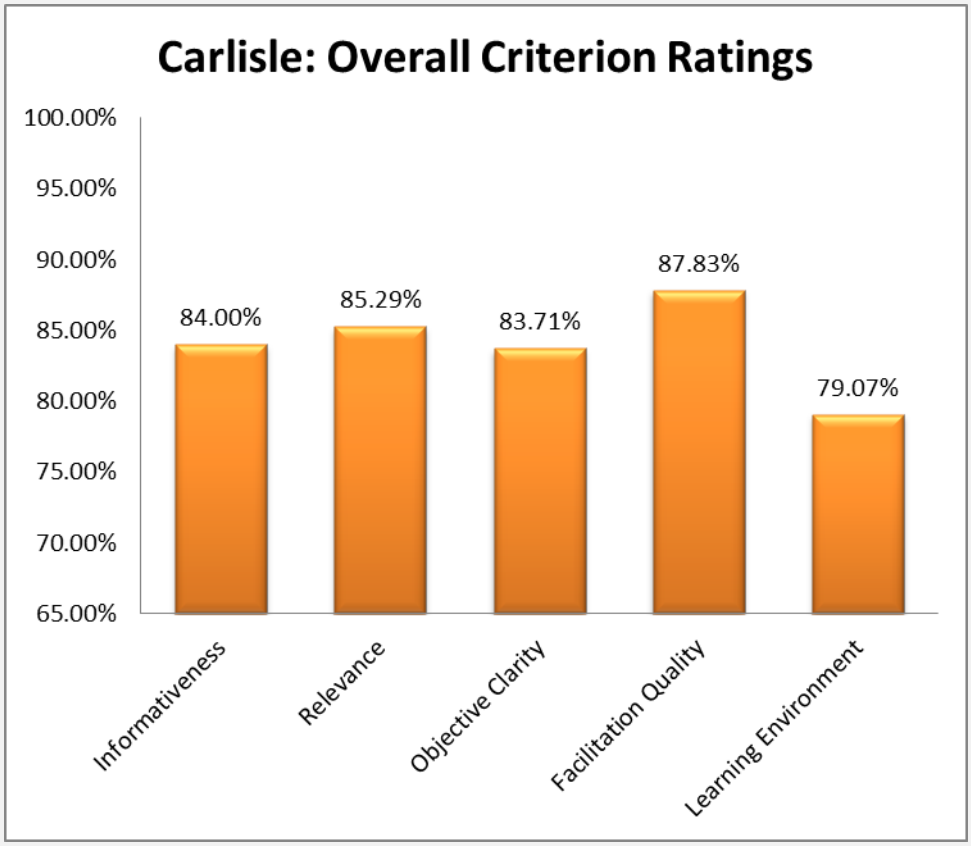
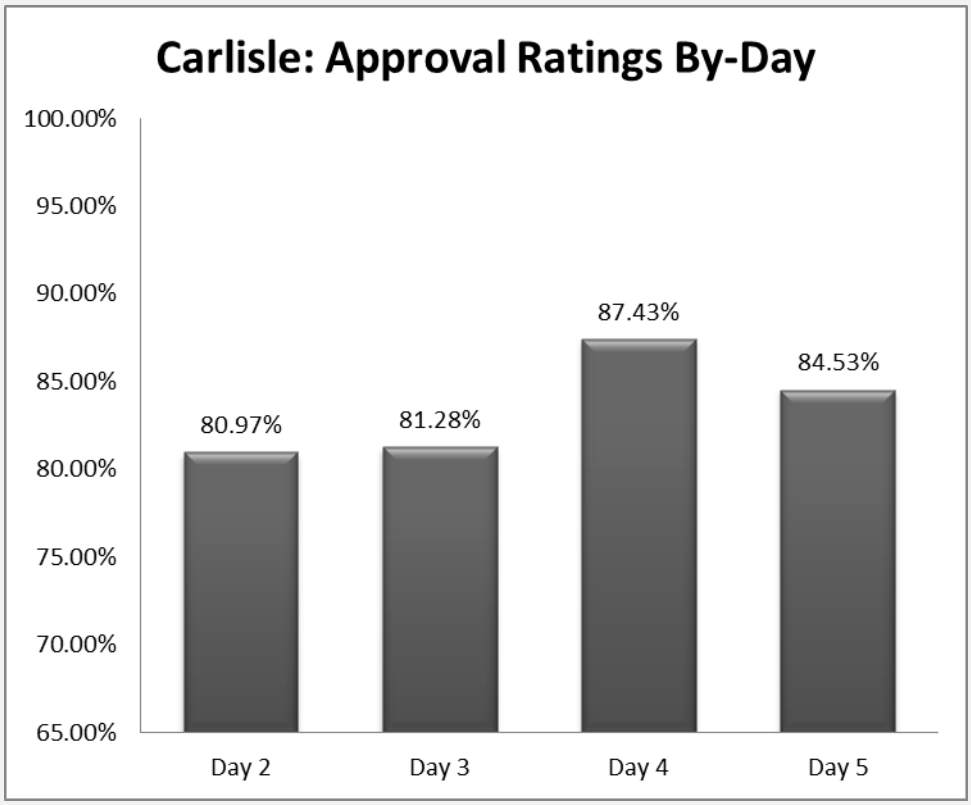
4
5


Carlisle: Clarity of Objectives
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
1.67%
9.52%
59.76%
29.53%
1
2
3
4
5

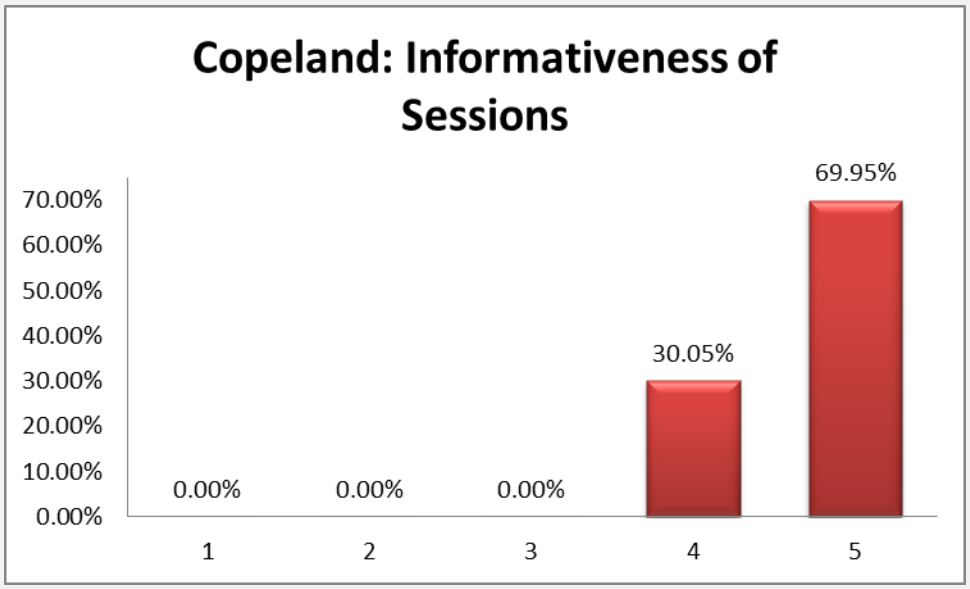

Carlisle: Facilitation Quality
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
1.67%
6.19%
51.79%
42.03%
1
2
3
4
5

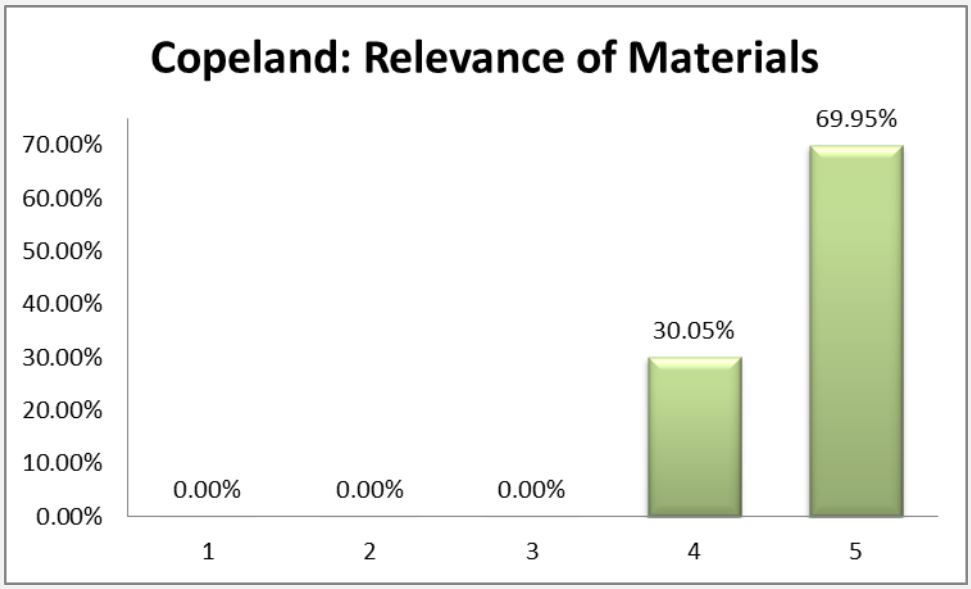

Carlisle: Quality of Learning Environment
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
7.74%
20.36%
40.72%
31.19%
1
2
3
4
5

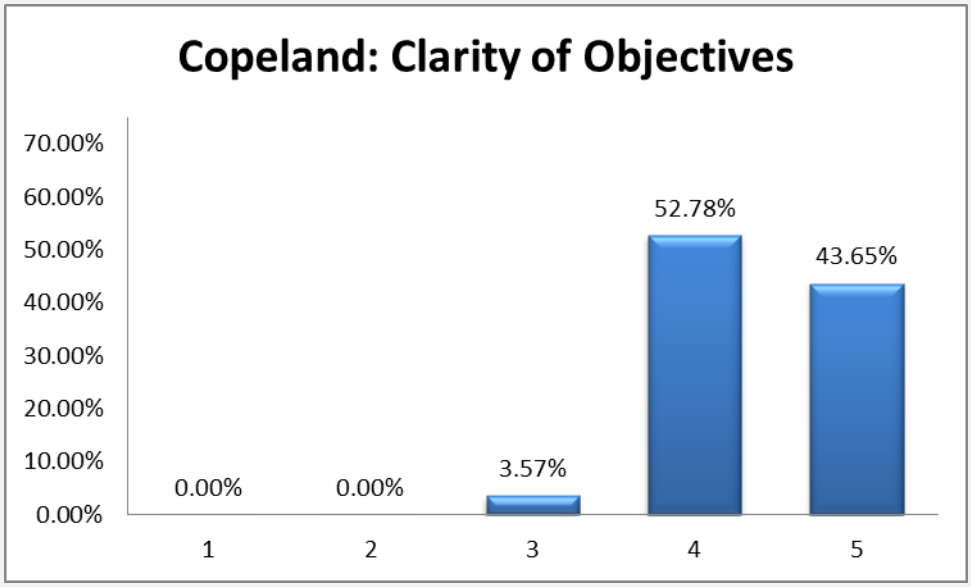

Carlisle: Overall Criterion Ratings
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
84.00%
85.29%
83.71%
87.83%
79.07%
Informativeness
Relevance
Objective Clarity
Facilitation Quality
Learning Environment


Carlisle: Approval Ratings By-Day
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
80.97%
81.28%
87.43%
84.53%
Day 2
Day 3
Day 4
Day 5

A1.3. Copeland






Copeland: Clarity of Objectives
70.00%
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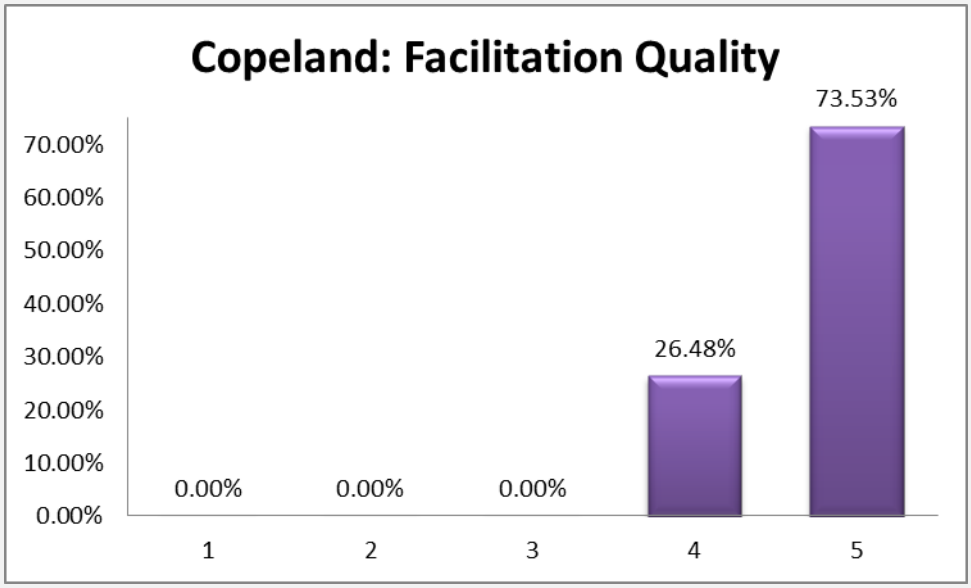
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
3.57%
52.78%
43.65%
1
2
3
4
5


Copeland: Facilitation Quality
70.00%
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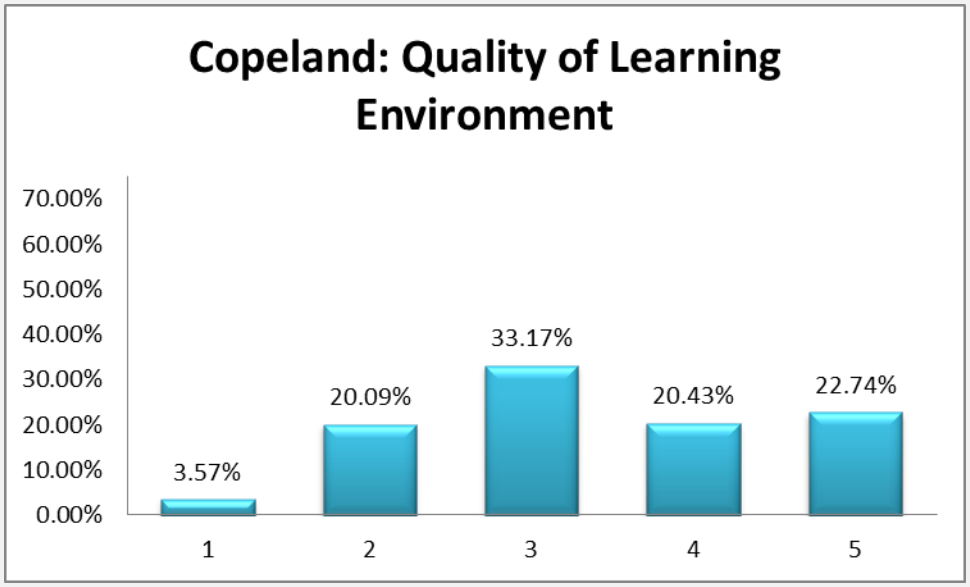
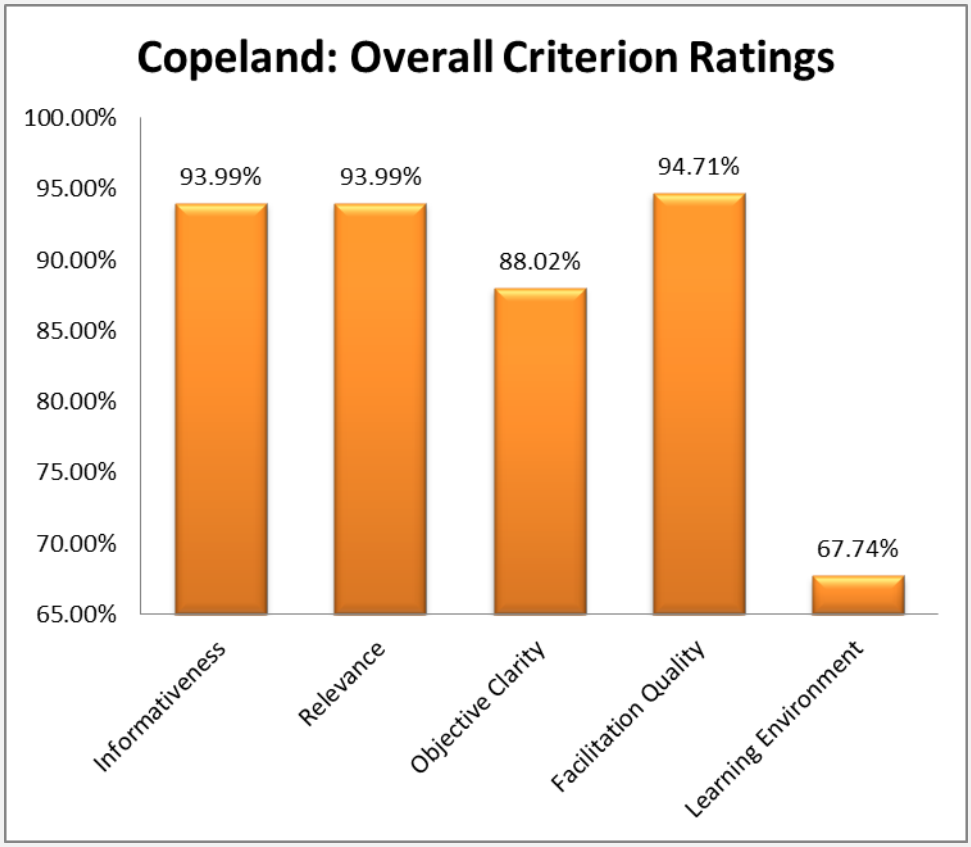
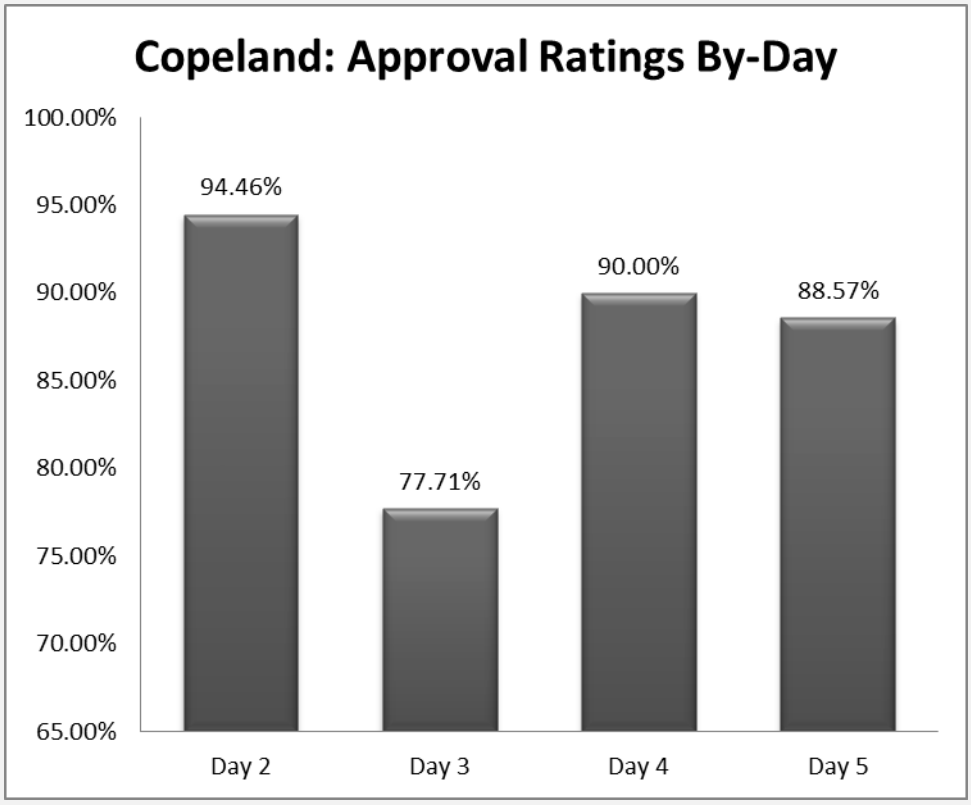
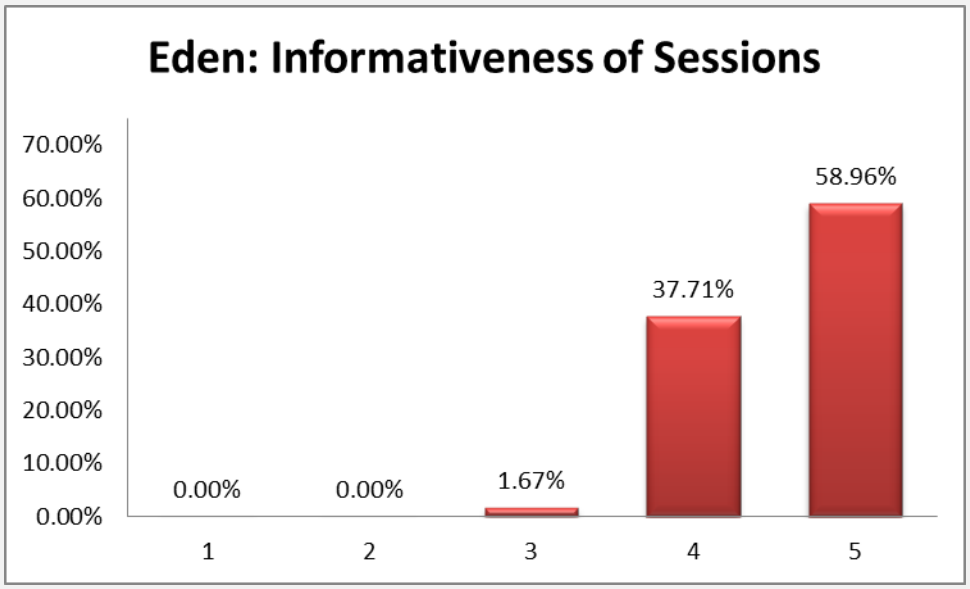
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
0.00%
26.48%
73.53%
1
2
3
4
5

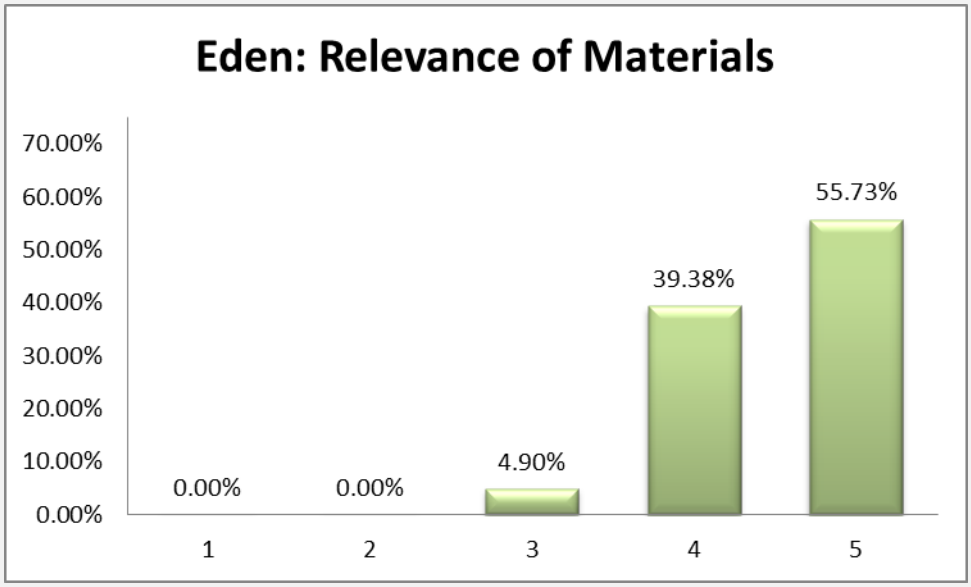

Copeland: Quality of Learning Environment
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
3.57%
20.09%
33.17%
20.43%
22.74%
1
2
3
4
5


Copeland: Overall Criterion Ratings
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
93.99%
93.99%
88.02%
94.71%
67.74%
Informativeness
Relevance
Objective Clarity
Facilitation Quality
Learning Environment


Copeland: Approval Ratings By-Day
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
94.46%
77.71%
90.00%
88.57%
Day 2
Day 3
Day 4
Day 5

A1.4. Eden


Eden: Informativeness of Sessions
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
1.67%
37.71%
58.96%
1
2
3
4
5


Eden: Relevance of Materials
70.00%
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50.00%
40.00%
30.00%
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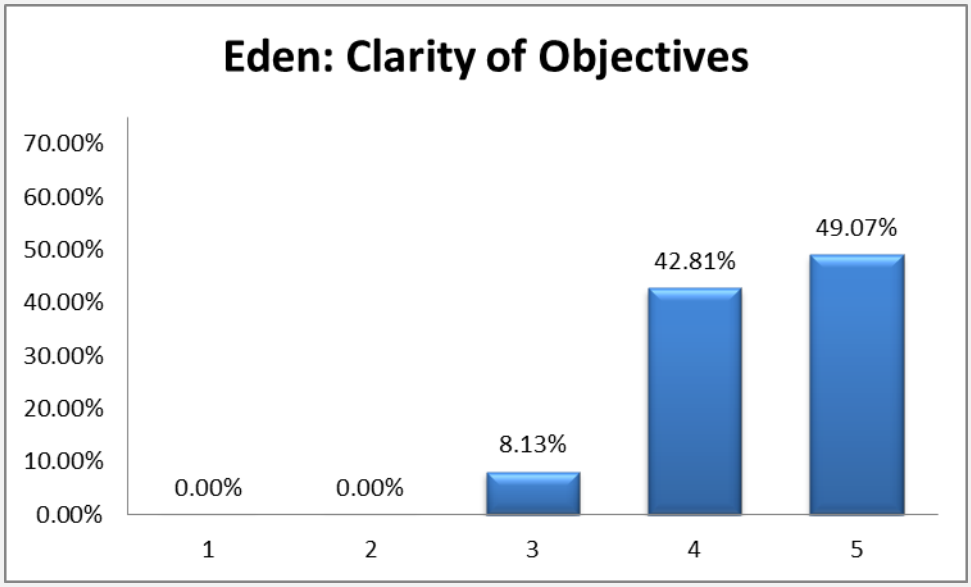
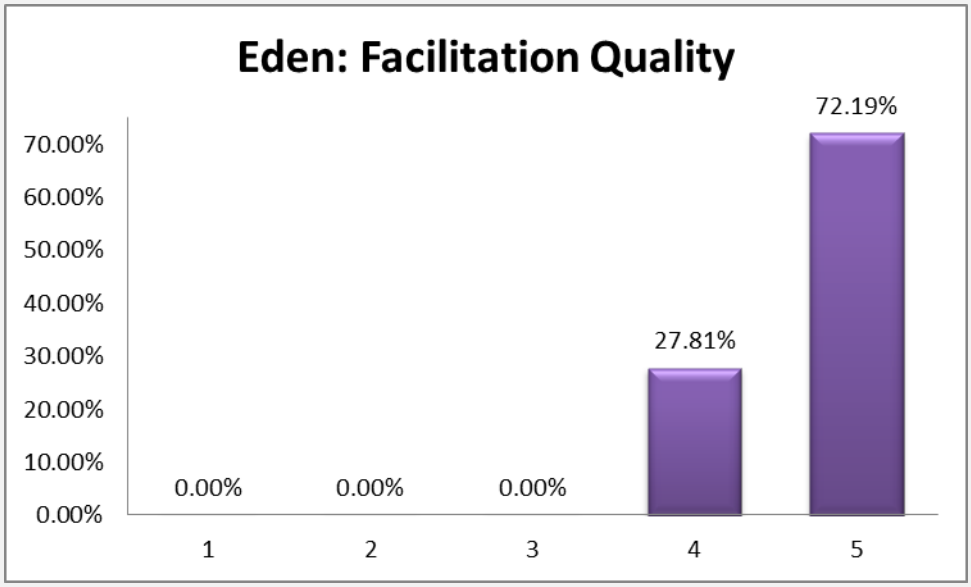
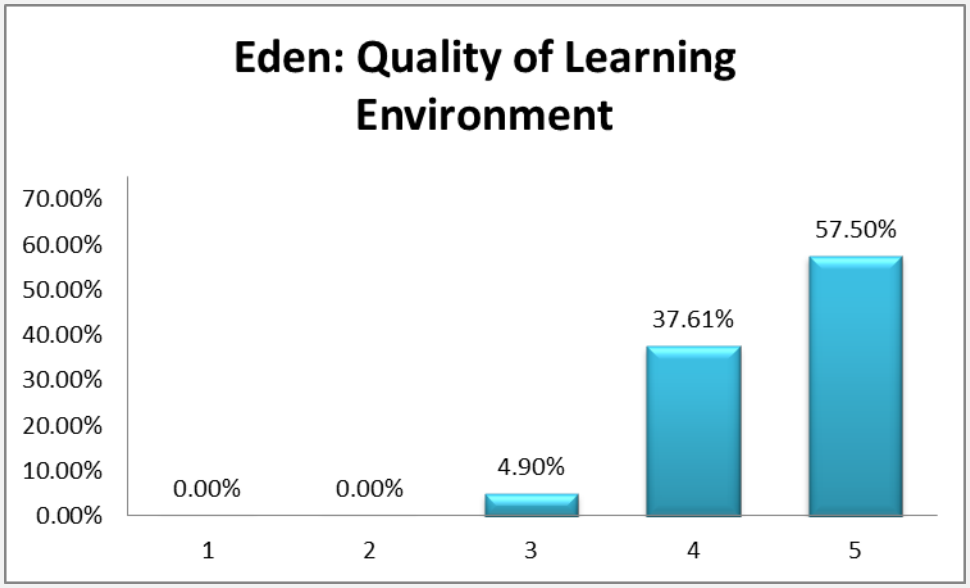
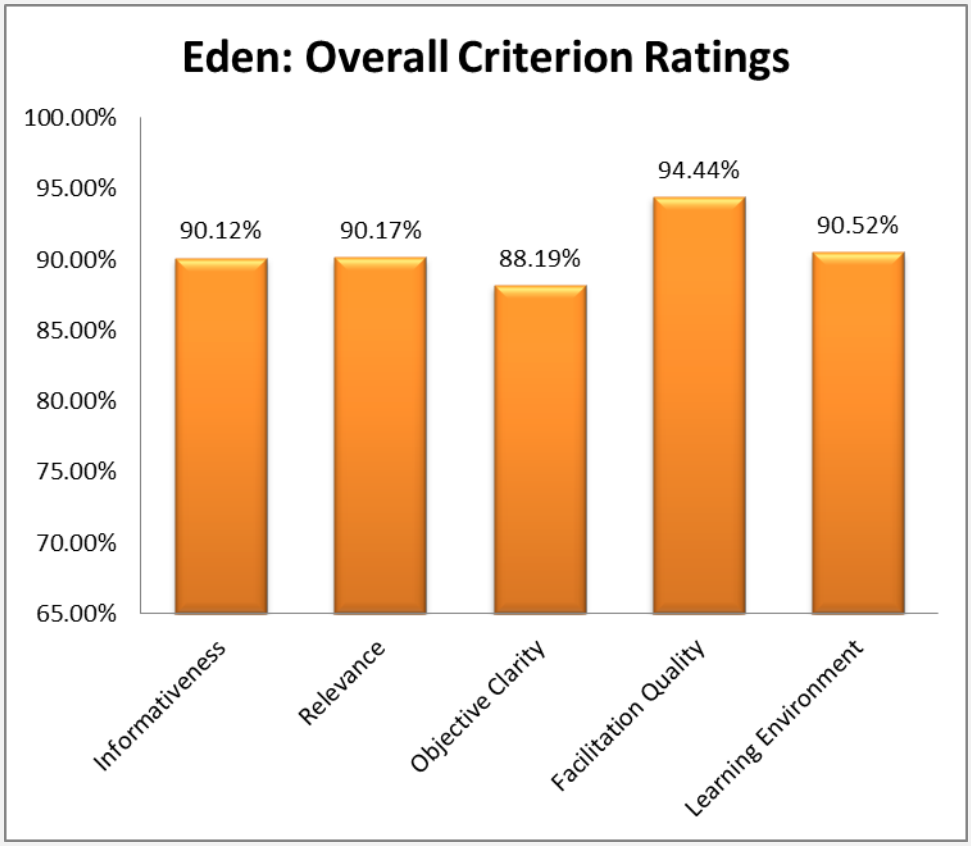
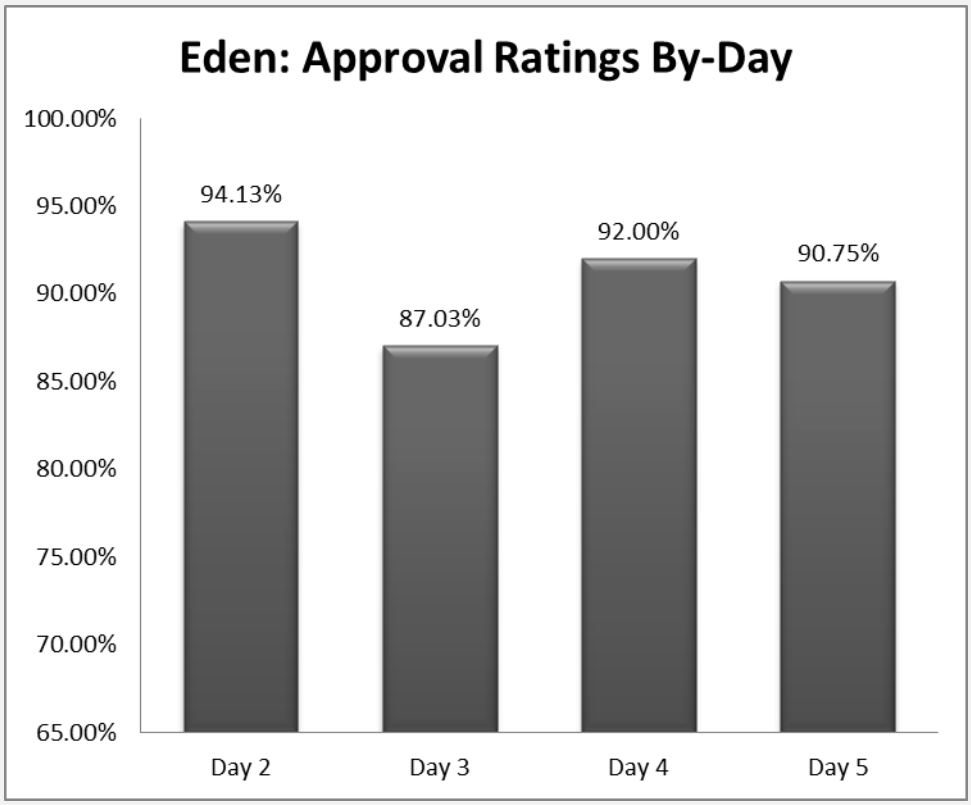
0.00%
0.00%
4.90%
39.38%
55.73%
1
2
3
4
5


Eden: Clarity of Objectives
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
8.13%
42.81%
49.07%
1
2
3
4
5

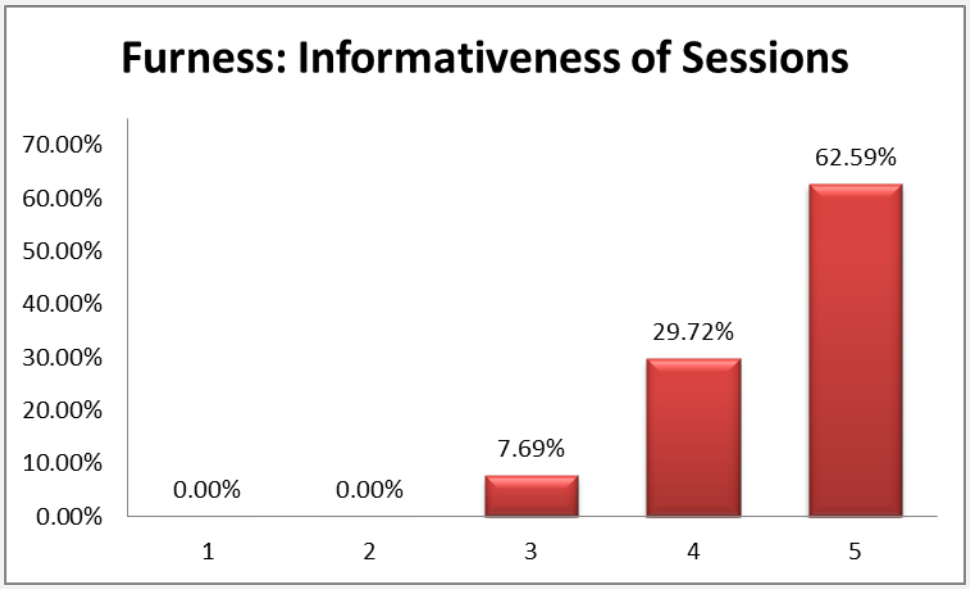

Eden: Facilitation Quality
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
0.00%
27.81%
72.19%
1
2
3
4
5

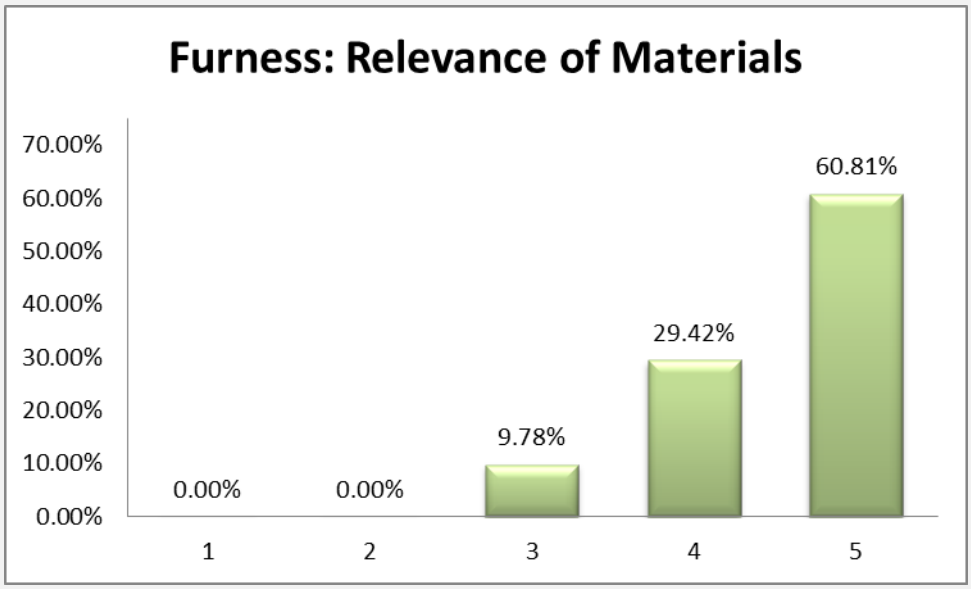

Eden: Quality of Learning Environment
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
4.90%
37.61%
57.50%
1
2
3
4
5


Eden: Overall Criterion Ratings
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
90.12%
90.17%
88.19%
94.44%
90.52%
Informativeness
Relevance
Objective Clarity
Facilitation Quality
Learning Environment


Eden: Approval Ratings By-Day
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
94.13%
87.03%
92.00%
90.75%
Day 2
Day 3
Day 4
Day 5

A1.5. Furness


Furness: Informativeness of Sessions
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
7.69%
29.72%
62.59%
1
2
3
4
5


Furness: Relevance of Materials
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
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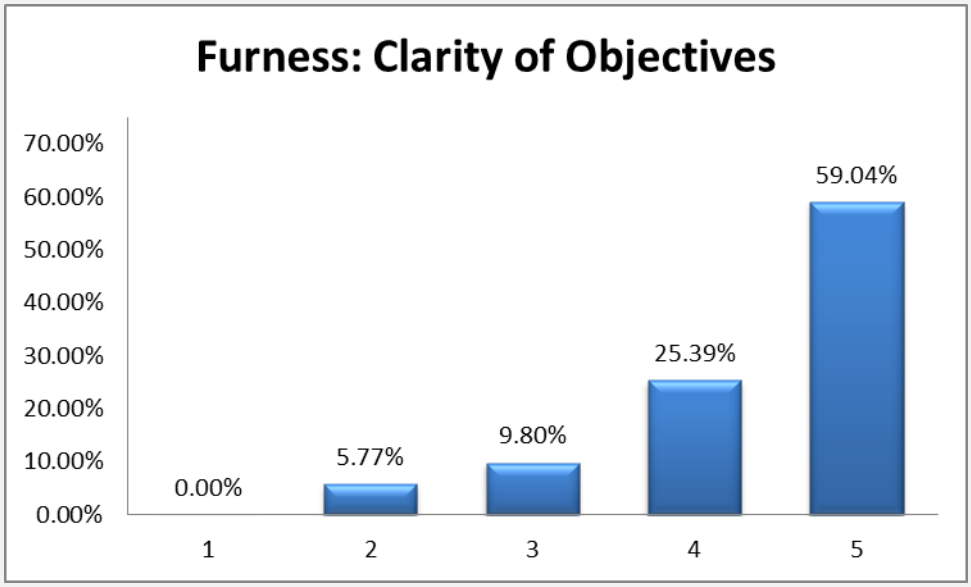
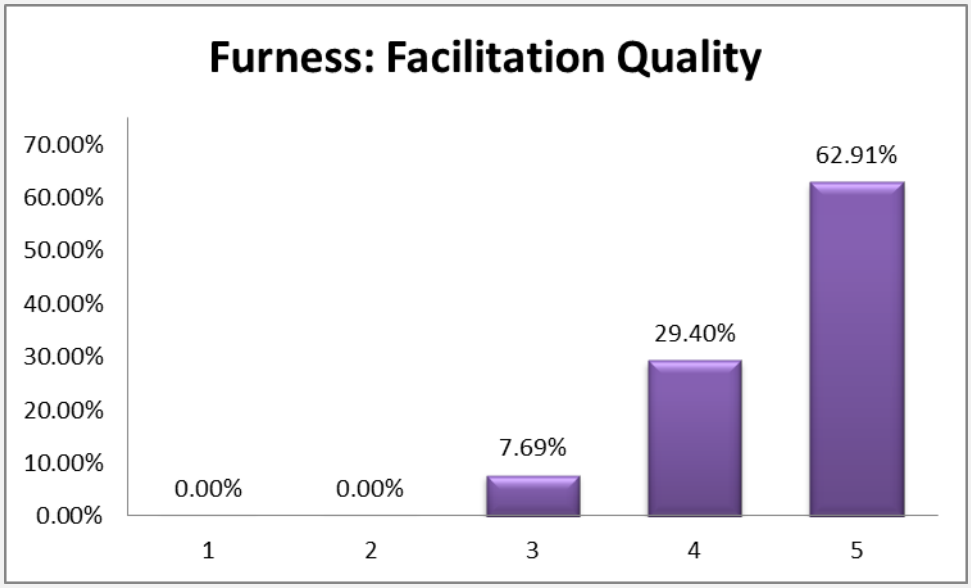
0.00%
0.00%
9.78%
29.42%
60.81%
1
2
3
4
5


Furness: Clarity of Objectives
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
5.77%
9.80%
25.39%
59.04%
1
2
3
4
5


Furness: Facilitation Quality
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
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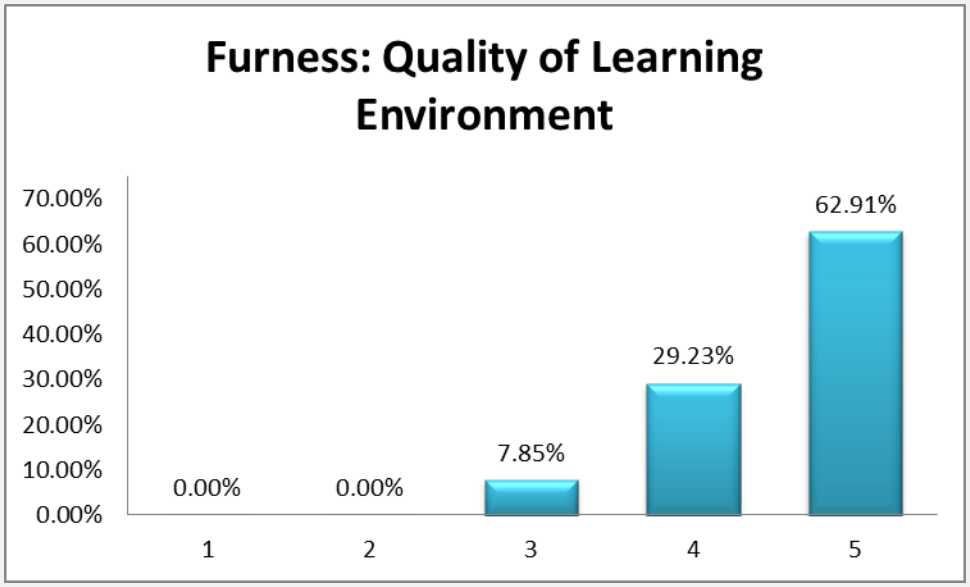
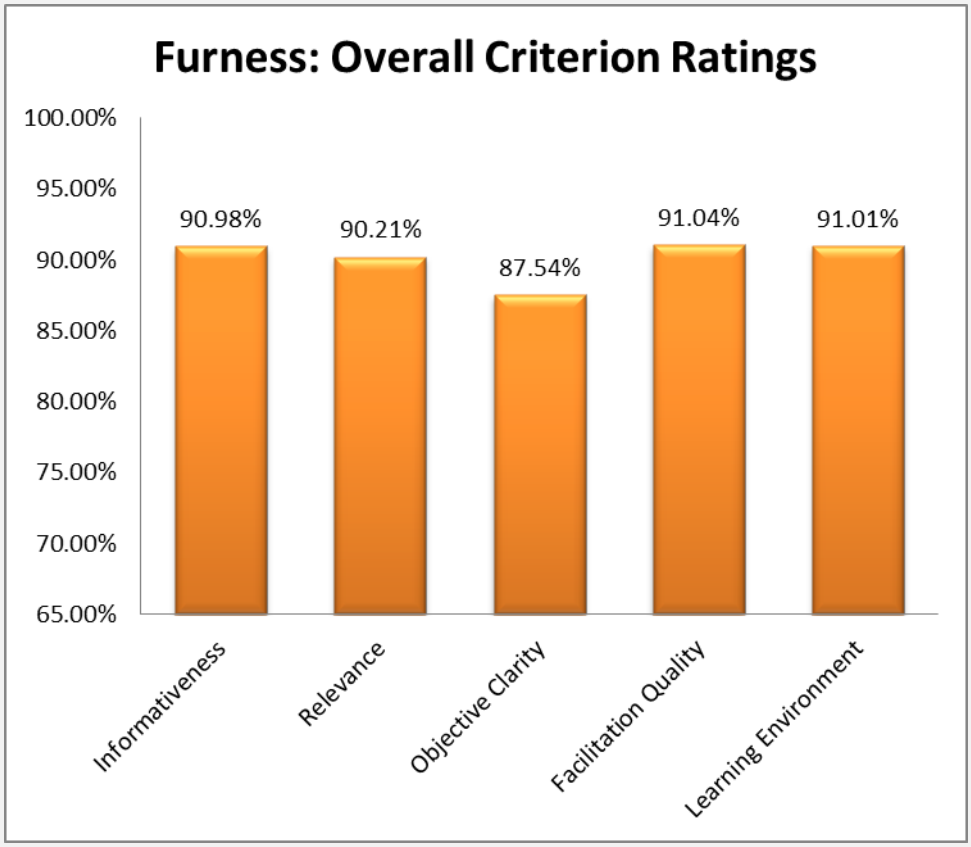
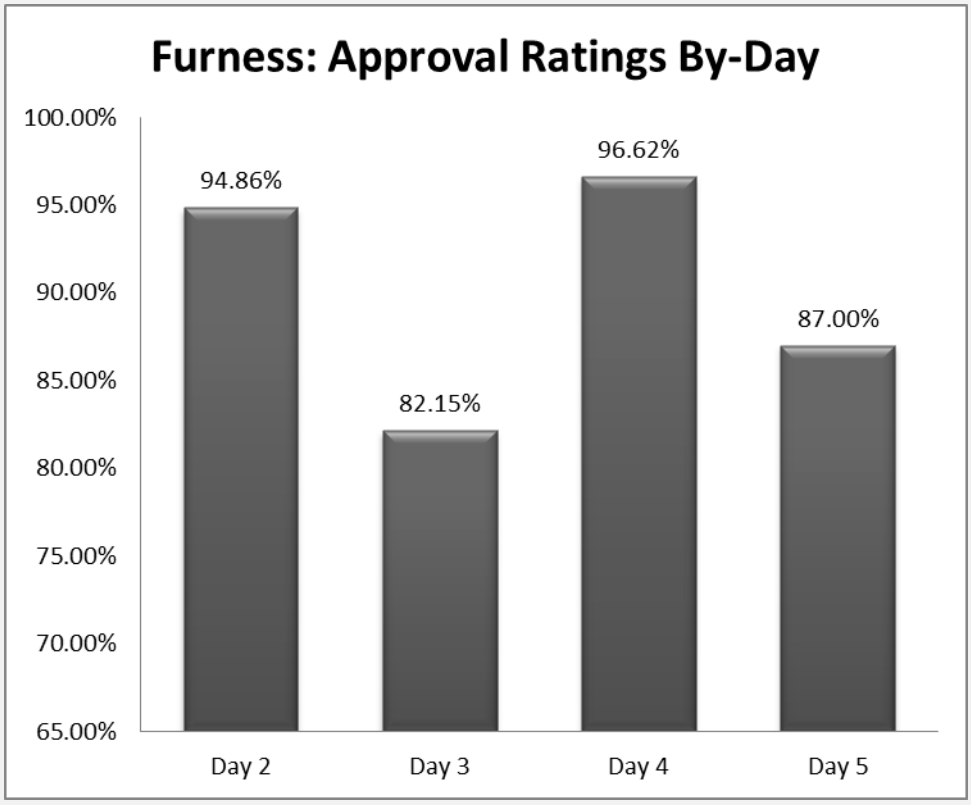
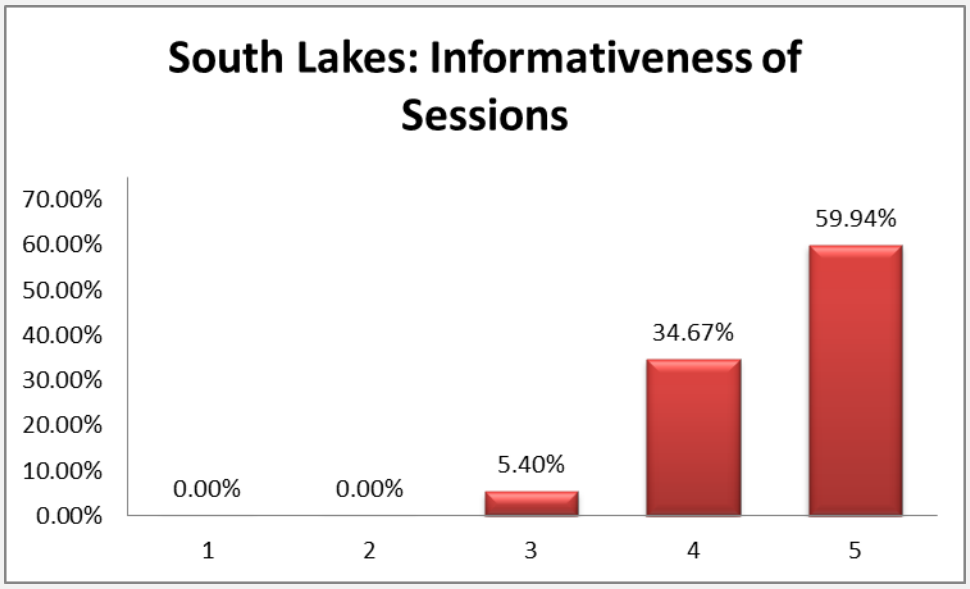
0.00%
0.00%
7.69%
29.40%
62.91%
1
2
3
4
5

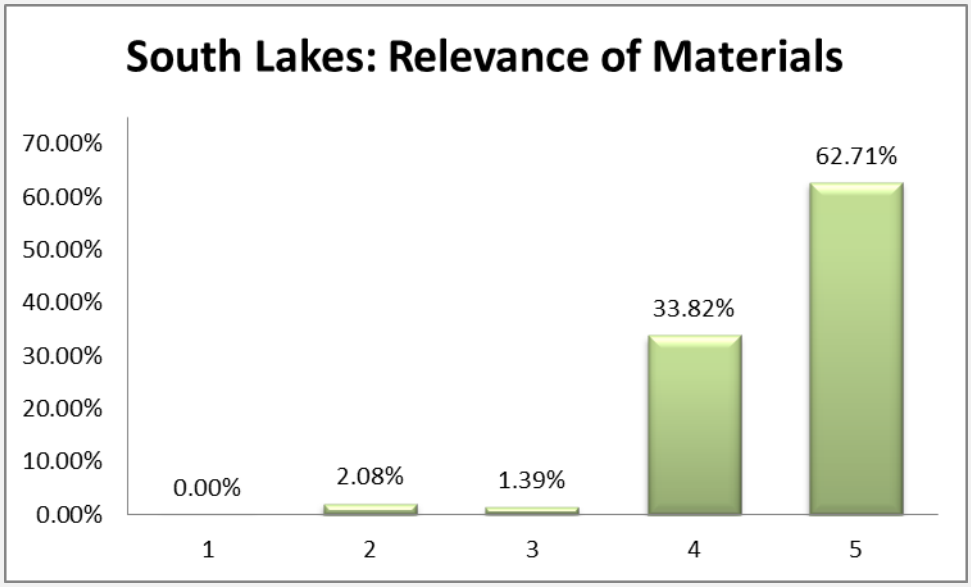

Furness: Quality of Learning Environment
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
7.85%
29.23%
62.91%
1
2
3
4
5

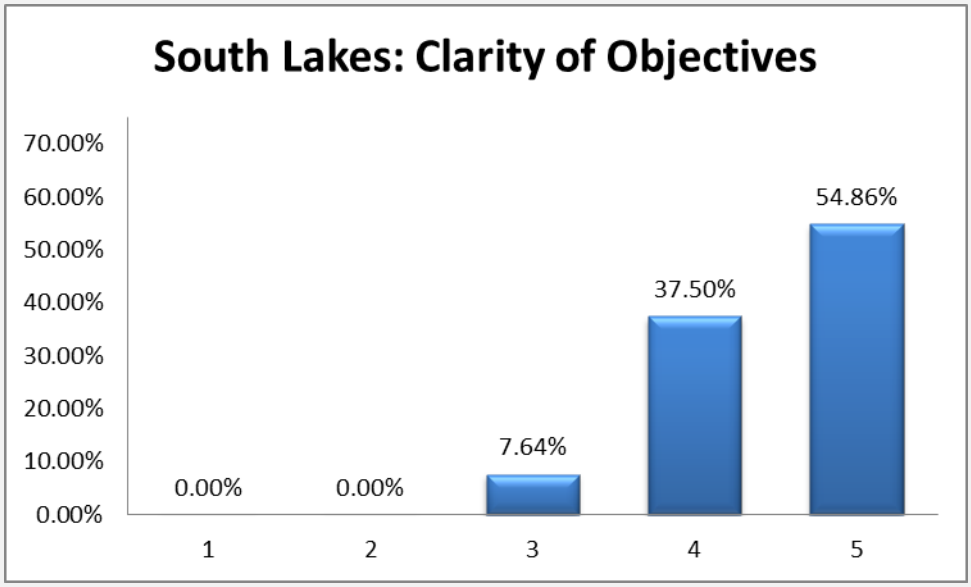

Furness: Overall Criterion Ratings
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
90.98%
90.21%
87.54%
91.04%
91.01%
Informativeness
Relevance
Objective Clarity
Facilitation Quality
Learning Environment

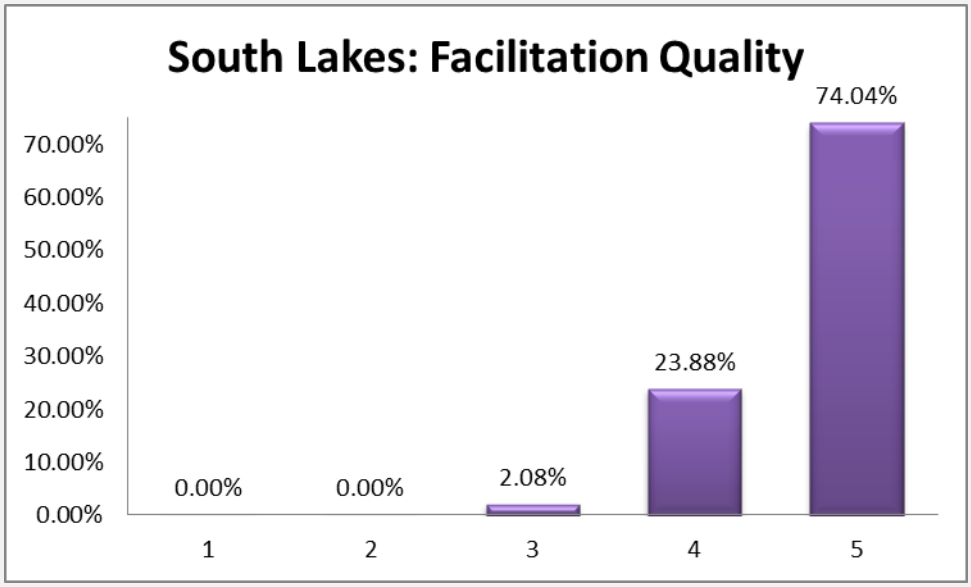


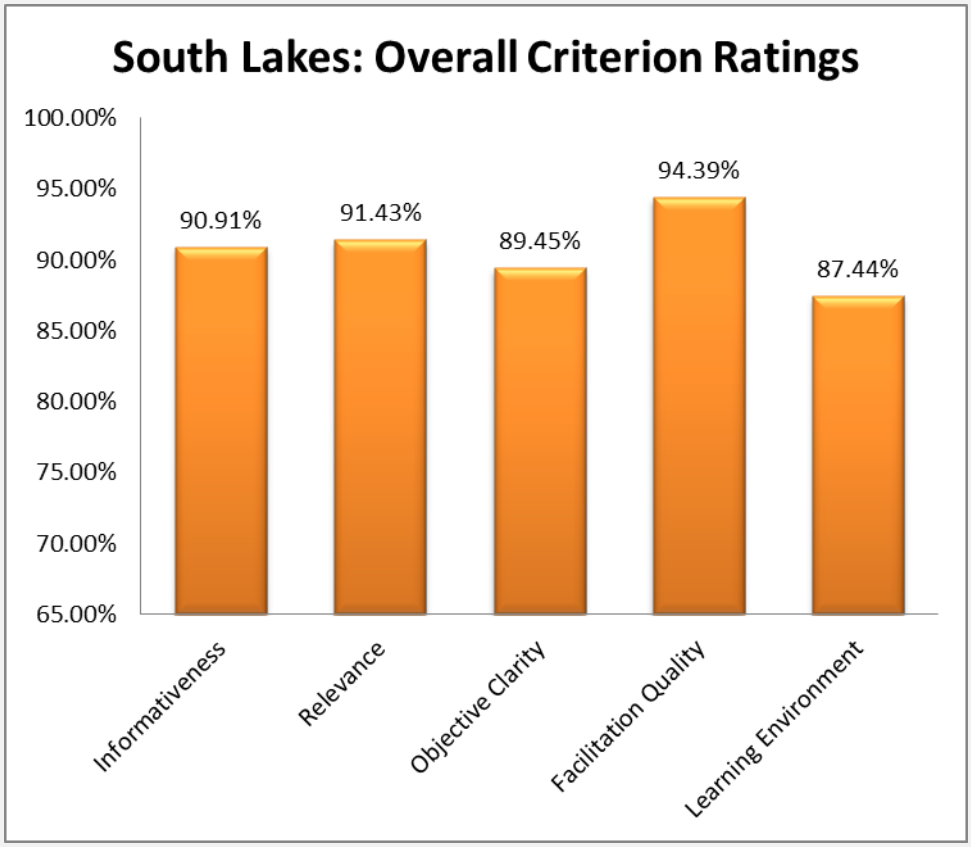
A1.6. South Lakes

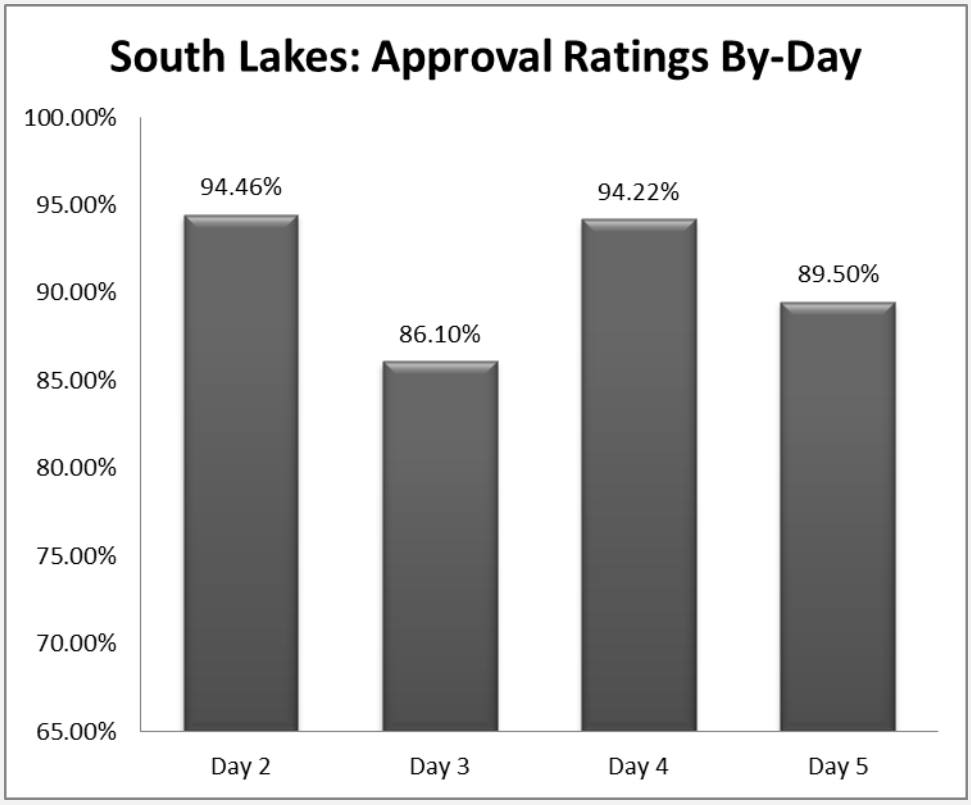



South Lakes: Relevance of Materials
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
2.08%
1.39%
33.82%
62.71%
1
2
3
4
5


South Lakes: Clarity of Objectives
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
7.64%
37.50%
54.86%
1
2
3
4
5


South Lakes: Facilitation Quality
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
0.00%
0.00%
2.08%
23.88%
74.04%
1
2
3
4
5


South Lakes: Overall Criterion Ratings
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
90.91%
91.43%
89.45%
94.39%
87.44%
Informativeness
Relevance
Objective Clarity
Facilitation Quality
Learning Environment


South Lakes: Approval Ratings By-Day
100.00%
95.00%
90.00%
85.00%
80.00%
75.00%
70.00%
65.00%
94.46%
86.10%
94.22%
89.50%
Day 2
Day 3
Day 4
Day 5

Appendix 2: Full Survey Structure

Note, this is the structure of the first of the two tranches; the second is identical, apart from any questions with a forward-oriented trajectory now being asked in the past tense.

Participant Information

Welcome to the online Foundation in Management and Leadership survey! As part of your commitment in accepting your place on the programme, completion is a requirement, though this should take no longer than five minutes and the information you provide will be of great value to us. During the course of programme, you will be asked to repeat this survey on a number of occasions, which will enable the progress of Foundation in Management and Leadership to be reviewed and the impact for staff and the organisation to be measured by an independent body.

All responses are **strictly anonymous** and there are no indicators collected which could render individual participants identifiable.

We thank you for your time and support.

A. About You and Your Role

Please answer all questions.

I. You

Do you identify yourself as male or female?

What is your age in full years?

II. Your Role

What is your grade band?

Do you work part-time or full-time?

Do you occupy a clinical or non-clinical role?

For how many years have you worked in the NHS?

For how many years have you worked in managerial positions in the NHS?

How many people do you currently manage?

B. General Self-Evaluation

Please answer all questions as honestly as you can. Remember that all data is anonymous.

I. How I see myself

Please rate your agreement with each of the following statements on a scale of 1 (Disagree Strongly) to 10 (Agree Strongly). "In my life in general, I consider myself to be..."

- "An assertive person."
- "A confident person."
- "A good communicator."
- "A good listener."
- "Good with numbers."
- "Good at managing my time."
- "Good at dealing with conflict."
- "Comfortable with change."
- "A team-player."
- "Good at independent decision-making."
- "Respectful of authority."

C. Organisational Knowledge

Please answer all questions.

I. Your understandings

Rate on scale of 1 (Very poor) to 10 (Very strong) your current understanding of:

- Services within CPFT.
- Quality performance measures used within CPFT.
- CPFT's Organisational vision, strategy and business plans.

II. Role Balance

Do you feel that you are able to effectively balance the operational and managerial aspects of your role? Y/N

- If 'no,' which of the aspects takes up proportionately more of your time than it should? Operational/Managerial

D. Management

Please answer all questions.

I. Being Managed

Rate your agreement with each of the following statements on a 1 (Disagree Strongly) to 10 (Agree Strongly) scale. "In my current role, I am…"

- "Trusting of the people who manage me."
- "Trusted by the people who manage me."
- "Able to be assertive with the people who manage me."
- "Good at listening to the people who manage me."
- "Listened to by the people who manage me."
- "Able to influence the people who manage me."

- "Often have to chase the people who manage me for important information."
- "Often in conflict with the people who manage me."
- "Able to effectively resolve conflicts with my manager(s)."
- "Respectful of the people who manage me."
- "Worried about upsetting the people who manage me."
- "Liked by the people who manage me."

II. Managing Others

- Please rate your agreement with each of the following statements on a 1 (Disagree Strongly) to 10 (Agree Strongly) scale. "In my current role, I feel that am..."
- "Trusting of the people I manage."
- "Trusted by the people I manage."
- "Able to be assertive with the people I manage."
- "Good at listening to the people I manage."
- "Listened to by the people I manage."
- "Able to influence the people I manage."
- "Often have to chase the people I manage for important information."
- "Often in conflict with the people I manage."
- "Able to effectively resolve conflicts with the people I manage."
- "Respectful of those the people I manage."
- "Worried about upsetting the people I manage."
- "Liked by the people I manage."

E. Role and Programme

Please answer all questions.

I. Role Satisfaction

Please rate your agreement with each of the following statements on a 1 (Disagree Strongly) to 10 (Agree Strongly) scale. "Overall, in my current role, I am..."

- "Happy."
- "Sometimes out of my depth."
- "Good with budgetary information."
- "Good at managing my own time."
- "Comfortable with organisational change."
- "Good at managing resources."
- "Well-informed."
- "Effective."

II. The Programme

Please rate your agreement with each of the following statements on a 1 (Disagree Strongly) to 10 (Agree Strongly) scale.

- "I *hope* that the Foundation in Management and Leadership Programme will help me develop as a manager."
- "I *expect* that the Foundation in Management and Leadership Programme will help me develop as a manager."

Thank You!

You have now finished. We are very grateful for the time you have invested in completing this survey, and would once again like to remind participants that all data are fully anonymous.
The outcomes of the survey will be made available to all participants once Foundation in Management and Leadership Programme, and its broader evaluation, are complete.

Survey Ends.

Appendix 3: SPSS 19.0 Variables

A3.1. SPSS 19.0 Core Variables

Question.	SPSS Variable Label.	Question Content.
1.	Gender	Gender
2.	Age	Age (in full years)
3.	NHSGrade	NHS Grade
4.	JobStat	Job Status
5.	JobType	Job Type
6.	NHSExp	Years in NHS (in full years)
7.	ManagExp	Years in NHS Management (in full years)
8.	Managees	Number of persons Managed
9.	SelfAssert	"An assertive person."
10.	SelfConf	"A confident person."
11.	SelfCom	"A good communicator."
12.	SelfListen	"A good listener."
13.	SelfNumerate	"Good with numbers."
14.	SelfTiming	"Good at managing my time."
15.	SelfConflict	"Good at dealing with conflict."
16.	SelfChange	"Comfortable with change."
17.	SelfTeam	"A team-player."

18.	SelfIndep	"Good at independent decision-making."
19.	SelfResp	"Respectful of authority."
20.	KnowServices	Knowledge of services within CPFT
21.	KnowMeasures	Understanding of quality performance measures used within CPFT.
22.	KnowVision	Understanding of CPFT's Organisational vision, strategy and business plans.
23.	WorkBalance	Able to balance operational and managerial
24.	DominantRole	Operational/managerial.
25.	TrustManagers	"Trusting of the people who manage me."
26.	ManagerTrust	"Trusted by the people who manage me."
27.	AssertManagers	"Able to be assertive with the people who manage me."
28.	ListenManagers	"Good at listening to the people who manage me."
29.	ManagerListen	"Listened to by the people who manage me."
30.	InfluenceManagers	"Able to influence the people who manage me."
31.	ChaseManagers	"Often have to chase the people who manage me for important information."
32.	ConflictManagers	"Often in conflict with the people who manage me."
33.	ConflictResManag	"Able to effectively resolve conflicts with my manager(s)."
34.	RespectManagers	"Respectful of the people who manage me."
35.	UpsetManagers	"Worried about upsetting the people who manage me."
36.	ManagersLiked	"Liked by the people who manage me."
37.	TrustEmploy	"Trusting of the people I manage."
38.	EmployTrust	"Trusted by the people I manage."
39.	AssertEmploy	"Able to be assertive with the people I manage."
40.	ListenEmploy	"Good at listening to the people I manage."
41.	EmployListen	"Listened to by the people I manage."

42.	InfluenceEmploy	"Able to influence the people I manage."
43.	ChaseEmploy	"Often have to chase the people I manage for important information."
44.	ConflictEmploy	"Often in conflict with the people I manage."
45.	ConflictResEmp	"Able to effectively resolve conflicts with the people I manage."
46.	RespectEmploy	"Respectful of those the people I manage."
47.	UpsetEmploy	"Worried about upsetting the people I manage."
48.	EmployLiked	"Liked by the people I manage."
49.	RoleHappy	"Happy."
50.	RoleDepth	"Sometimes out of my depth."
51.	BudgetRole	"Good with budgetary information."
52.	TimeRole	"Good at managing my own time."
53.	ChangeRole	"Comfortable with organisational change."
54.	ResourceRole	"Good at managing resources."
55.	InformedRole	"Well-informed."
56.	EffectRole	"Effective."
57.	HopeOutput	Hope that Leadership Programme will help develop skills
58.	ExpectOutput	Expect that Leadership Programme will help develop skills

A3.2. SPSS 19.0 Compound Variables.

Variable	Component Variables
Role Assertiveness	AssertManagers + InfluenceManagers + AssertEmploy + InfluenceEmploy
Role Confidence	SelfConflict + UpsetManagers (reversed) + UpsetEmploy (reversed) + RoleDepth (reversed) + EffectRole
Role Openness	ListenManagers + ListenEmploy + RespectManagers + RespectEmploy
Role Communication	ManagerListen + EmployListen + AssertManagers + AssertEmploy
Role Resource Managing	ChaseManagers (reversed) + ChaseEmploy (reversed) + BudgetRole + TimeRole + ResourceRole
Role Satisfaction	ManagersLiked + RespectManagers + EmployLiked + RespectEmploy + RoleHappy
Role Conflict management	ConflictManagers (reversed) + ConflictResManag + RespectManagers + ConflictEmploy (reversed) + ConflictResEmp + RespectEmploy + RoleDepth (reversed)
Role-based Self-Positivity	ListenManagers + ListenEmploy + ManagersLiked + EmployLiked + InfluenceManagers + InfluenceEmploy + ConflictResManag + ConflictResEmp + RoleHappy + InfluenceEmploy + InfluenceManagers + EffectRole
Role-based Other-Positivity	ManagerListen + EmployListen + ConflictManagers (reversed) + ConflictEmploy (reversed) + RoleDepth (reversed) + ChaseManagers (reversed) + ChaseEmploy (reversed) + UpsetManagers (reversed) + UpsetEmploy (reversed)

Appendix 4: Participant Interview Schedule

Name	
Role	
Date of Interview	

Preamble:

- Greeting.
- Interview should take no more than 20-30 minutes, though if you have the time you can go on for as long as you want.
- In the final outputs, all contributions will be anonymised. The research commissioners will have no access to the raw data itself, only the interviewer/transcriber will have that, so you can be *as candid as you wish*.
- The interview will be recorded, so your verbal consent is required – are you happy for us to do this?
- All responses are voluntary. You do not have to answer a question, or address a topic, if you do not want to.
- The interview will be very free form – we are not really looking for specific answers so much as for you to just tell us about your experience of FIM itself, focusing on whatever *you* think is important.

	Question	Prompt On (Where Necessary)	√
1	How have you found the FIM training so far?	• Strengths? (Give examples)	
		• Weaknesses? (Give examples)	
		• Combination of in-house delivery and external facilitators.	
		• Flexibility over locality dates/venues.	
		• Period between programme days.	
Notes.			

	Question	Prompt On (Where Necessary)	√
2	Has what you have learned in the FIM programme had any *constructive* impacts on your broader working practices so far? If so, can you give any firm examples of situations in which it has changed the way you do things, and how it has changed them?	• Interactions with others.	
		• Confidence/Leadership Style.	
		• Institutional knowledge.	
		• Time and Resource/Money management.	
Notes.			

	Question	Prompt On (Where Necessary)	√
3	Have there been any obvious constraints upon you using the materials from FIM in your working role so far? If so, can you give any examples?	• Workload constraints?	
		• Applicability of materials to practice?	
		• Level of materials?	
		• Not been time yet?	
Notes.			

	Question	Prompt On (Where Necessary)	√
4	Do you expect that what you have learned so far in the FIM programme will impact *constructively* upon your working practices in the future? If so, in what ways? Why do expect this?	• Interactions with others.	
		• Confidence/Leadership Style.	
		• Institutional knowledge.	
		• Time and Resource/Money management.	
Notes.			

	Question	Prompt On (Where Necessary)	√
5	Is there anything you are concerned might obstruct these impacts taking place? Give examples if possible.	• Workload?	
		• Applicability of materials to practice?	
		• Level of materials?	
		• Support?	
Notes.			

	Question	Prompt On (Where Necessary)	√
6	Given what you have experienced of FIM so far, has your attitude towards your management and/or leadership role changed in any *positive* ways? For example, has your enthusiasm for further training increased? Do you feel more valued as a leader?	• Career ambitions?	
		• Awareness of development needs?	
		• Better understanding of expectations?	
		• Stronger sense of community?	
Notes.			

	Question	Prompt On (Where Necessary)	√
7	Given what you have experienced of FIM so far, do you have any new workplace worries or concerns that did not exist before, or that have been amplified during the programme? If so, can you give examples?	• Weight of expectation?	
		• Position within Trust?	
		• Negative comparisons to others?	
		• Feeling out-of-depth?	
Notes.			

	Question	Prompt On (Where Necessary)	√
8	Is there anything you'd like to add that we've not already covered?		
Notes.			

Finalising.

- Thank you.
- There will be a follow-up interview later in the programme.
- Printed outputs of study will be made available to you via the Trust systems, and it is also hoped that the researchers will be able to put together a presentation for stakeholders at a later date. If the latter were to take place, would you be interested in attending such an event?

Yes / No

Appendix 5: Management Interview Schedule

Name	
Role/FIM Participants Managed	
Date of Interview	

Preamble:

- Greeting.
- Interview should take no more than 20-30 minutes, though if you have the time you can go on for as long as you want.
- Interview will be recorded, verbal consent required.
- All responses are voluntary. You do not have to answer a question, or address a topic, if you do not want to.

	Question	Prompt On (Where Necessary)	√
1	From what you know of Foundation in Management, what were your expectations of the programme itself?	• As much detail as possible here (useful for contextualising manager's own engagement).	
Notes.			

2	[If not fully covered in Q1]. What were your hopes and expectations for the personal development of [FIM Participant's name] with respect to their participation in Foundation in Management?	• Personal aspects? (e.g. confidence in role)	
		• Practical aspects? (i.e. specific skill development)	
		• Knowledge of, and involvement in, the organisation itself?	
Notes.			
3	Have you witnessed any personal outcomes for [FIM participant's name] since they began their involvement with Foundation in Management?	• Personal aspects? (e.g. confidence in role)	
		• Practical aspects? (i.e. specific skill development)	
		• Knowledge of, and involvement in, the organisation itself?	
Notes.			
4	[If answer to Q3 is "Yes"]. Have these personal changes made any observable impact in the workplace?	• On patient care?	
		• On staff?	
		• On engagement with the organisation itself?	
		• On financial matters?	
		• On partnerships?	

Notes.

5	From what you know of Foundation in Management, and what you have seen, would you say that it has offered something different or new that prior initiatives have not? If so, what?	• Let them freewheel here.	
Notes.			
6	Are there any other matters you'd like to add that we've not covered in this interview?		
Notes.			

Finalising.

- Thank you.
- There will be a follow-up interview later in the programme.
- Printed outputs of study will be made available to you via the Trust systems, and it is also hoped that the researchers will be able to put together a presentation for stakeholders at a later date. If the latter were to take place, would you be interested in attending such an event?

Yes / No

Appendix 6: Session Evaluation Form

Cumbria Partnership NHS
NHS Foundation Trust

FOUNDATION IN MANAGEMENT AND LEADERSHIP PROGRAMME
EVALUATION FORM – Day 2

DATE:							
1. Did you find the sessions informative?	(Not at all)	1	2	3	4	5	(Definitely)
2. Did you find the course materials relevant?	(Not at all)	1	2	3	4	5	(Definitely)
3. Do you feel clear on the programme session objectives?	(Poor)	1	2	3	4	5	(Excellent)
4. The quality of facilitation and general manner when dealing with the group was...	(Poor)	1	2	3	4	5	(Excellent)
5. Did you find the environment suitable and conducive to learning?	(Not at all)	1	2	3	4	5	(Definitely)
6. How relevant do you feel that this training has been in relation to your current job role?							
7. Do you feel that the level of the content was appropriate, if not what would you suggest?							
8. Can you identify at least one thing that you will take away from this day? *(You can include more than one if you wish to)*							
9. Is there anything else that you would have liked to have seen included in the day?							

Additional Comments

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Thank you for taking the time to complete this form.

Please leave completed forms following completion of the day or return to Victoria Angel at The Learning Network, Voreda, Portland Place, Penrith, CA11 7QQ

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