

LEADS Business Unit Operational Plan 2015 - 2018



Introduction

The LEADS Business Unit is part of the Canadian College of Health Leaders and serves as the business arm of the Collaborative. It supports a national team of expert facilitators, executive coaches and strategic partners who serve a growing client interest in using LEADS-related leadership development to grow health leadership capacity and improve health leadership performance. The LBU also supports the LEADS *Community for Practice* and promotes the exchange of sharing across the community of health leaders.

A Flexible Business Model

As the leadership development services centre of the LEADS Collaborative, the LEADS Business Unit recognizes that to build leadership capacity across the country we must be flexible in the delivery of services while remaining true to our principles and values. Given this, we will selectively partner and collaborate with other organizations through a variety of relationships that will include:

- Delivery of core, high quality leadership development services by certified LEADS Faculty and Coaches
- The use of licensing agreements for use of the LEADS framework, services and programs as a strategy for expanding service capacity to support use of the LEADS framework.
- Establishment of independent contracting relationships to access key expertise.

Operational Priority Areas

Work of the LBU aligns with the three strategic priorities identified in the LEADS Collaborative Strategic Plan. In addition to these priority areas, we have added an overarching operational guideline that allows us to focus on accessible and efficient solutions-focused client services.

The Priority Areas for 2015 – 2018 are outlined below.

1. Knowledge Generation and Exchange

- a. Ensure that LBU programs and services are evidence-based and integrate latest research. Ensure development of new programs and tools that are current, evidence-informed, applicable to healthcare and meet client needs

- b. Foster the online LEADS *Community for Practice* for LEADS users that promotes knowledge exchange and resource sharing between and by a diverse group of users.
- c. Support initiatives and events to enable rapid sharing of leadership development innovations, success stories, tools and research.

2. Provision of Leadership Development Services and Programs

- a. Offer customized services and programs that: integrates the LEADS framework into talent development; builds leadership culture and strategy in organizations; considers organizational context; and differentiates where individuals, teams and organizations are on their leadership journey.
- b. Ensure a cadre of highly knowledgeable LEADS-certified faculty, coaches and consultants is established who possesses the knowledge, skills and attitude to work with clients to integrate LEADS into their organizations and practice.
- c. Develop capacity to deliver key services in French

3. Tools and Assessments

- a. Facilitate the creation of leadership development tools and assessments that help organizations integrate LEADS into practice, including tools that integrate the LEADS framework into the development of an organizational leadership strategy as well as succession planning, recruitment and retention, performance evaluation, change management and risk management at the individual and team, organization and system level.
- b. Identify priorities for and facilitate measurement of outputs and outcomes of LEADS-based leadership capacity development

4. Accessible and efficient solutions-focused client services

- a. Ensure all services are solution-focused, client-centred and geared to meet clients where they are at in their leadership capacity development journey.
- b. Ensure sustainability of LBU work within a not-for-profit framework.
- c. Develop and implement an evaluation strategy that encompasses the LBU services, the coaches, faculty and consultants to ensure the highest quality, evidence-based services and contribute to the gold-standard reputation of the LBU and the LEADS framework.
- d. Create and maintain a LEADS-based internal work environment to engage and empower the LBU Team.

LEADS Business Unit Operational Plan 2015 – 2018

R – responsible A – Accountable C – Consulted I – informed

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|--|---|-------------------------------|--|--|
| 1. Knowledge Generation and Exchange | | | | |
| <i>a. Ensure that LBU programs and services are evidence-based and integrate latest research. Ensure development of new programs and tools that are current, evidence-informed, applicable to healthcare and meet client needs</i> | | | | |
| i. Incorporate any updates to the LEADS framework into program development and design and incorporate a two-year document and workshop refreshment schedule. | Up to date materials for delivery of services | Tbd funding required | Material update: May 2016 Follows evergreening schedule | Staff (A) Faculty (R) |
| i. Ensure findings of MITACS fellowship research results are communicated and any information of needs integrated into program development | | Tbd funding might be required | June – November 2016 | Staff (AR) Sylvia Vilches (C) Shauna Fenwick (C) |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|--|--|-------------------|--|---|
| <i>b. Foster the online LEADS Community for Practice for LEADS users that promotes knowledge exchange and resource sharing between and by a diverse group of users.</i> | | | | |
| i. Develop a LEADS <i>Community for Practice</i> strategy that will build, support, foster and guide the community for practice, have clear goals and measures of success. | tbd | Operations budget | Ongoing LEADS Exchange Day material posted by July 15, 2015 | Staff (A R) Clients (C) LEADS consultants (C R) |
| <i>c. Support initiatives and events to enable rapid sharing of leadership development innovations, success stories, tools and research.</i> | | | | |
| i. Organize LEADS Exchange day on a yearly basis, in conjunction with the CCHL leadership conference. | LEADS Exchange Day that was judged as useful and helpful to the development of leadership capacity by participants | \$10,000 | June 2015, PEI Ottawa June 2016 | Staff (AR) LEAD exchange committee (C) |
| ii. Contribute to the generation of ideas and speakers for the joint LEADS/CHLNet quarterly webinar series | Meaningful participation in planning of joint LEADS/CHLNet quarterly webinar series | n/a | Quarterly 2015/2016 | Staff, coaches, faculty or clients can generate ideas |
| iii. Track organizational projects and identify interesting initiatives for | tbd | n/a | quarterly | Staff (AR) Clients (C) Coaches, Faculty (C) |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|--|--|-------------------|--|--|
| evaluation purposes and/ or sharing of tools and learnings. | | | | |
| iv. Breakfast panel session at NHLC | Breakfast session that informs the CCHL community of LEADS applications that is judged as being useful to them | operational | June 2015 | Staff (AR) Betty Mutwiri (R) Sandra Ramelli (R) |
| 4. Develop a communications strategy that incorporates knowledge translation on the evidence-base and uptake of the LEADS framework and the services of the LBU. | | | | |
| Develop a LBU Communications Plan | 2015 – 2018 Communications Plan | operational | October 2015 | Staff (R, A) Operations Council (C) CCHL Staff (C) |
| 2. Provision of Leadership Development Services and Programs | | | | |
| a. Offer customized services and programs that: integrates the LEADS framework into talent development; builds leadership culture and strategy in organizations; considers organizational context; and differentiates where individuals, teams and organizations are on their leadership journey. | | | | |
| i. Provide framework for decision-making for priority development of services and programs including time and resource | <ul style="list-style-type: none"> Operations Council approved priority investment framework that integrates the LEADS framework into | Operations budget | <ul style="list-style-type: none"> Decision-making framework April 2015 May 2015 for priorities in | <ul style="list-style-type: none"> Staff (RA) Operations Council (C) Governance Group (I) |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
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| requirements for approval by Operations Council on a yearly basis | talent development; builds leadership culture and strategy in organizations; considers organizational context; and differentiates where individuals, teams and organizations are on their leadership journey. | | 2015/2016 <ul style="list-style-type: none"> • November 2015 for priorities in 2016/2017 • November 2016 for priorities in 2017/2018 • Yearly adjustments are planned for June | |
| ii. Coordinate development of new programs and services as prioritized by the LEADS operations Council | <ul style="list-style-type: none"> • High quality new programs meet needs of LEADS clients • Specifics to be determined as they relate to identified priorities • Translation of LEADS 360 • Tool Development in collaboration with partners • Return on Investment work in collaboration with CHLnet • White paper on | Varies by identified priority (see priority list) \$20,000 \$13,500 \$ 7,500 \$3,000 | Tbd by OPS Council 2016/2017 2017/2018 2015 / 2016: by December 2015 By December 2015 By March 2016 By March 2016 | Staff (AR) CHLnet (R C) Consultants (C) OC and GG (I) |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|---|---|-------------------|---|---|
| | Diagnostic work and Leadership Development Strategies | | | |
| <i>b. Ensure a cadre of highly knowledgeable LEADS-certified faculty, coaches and consultants who possesses the knowledge, skills and attitude to work with clients to integrate LEADS into their organizations and practice.</i> | | | | |
| i. Maintain the LEADS Coach certification process and develop coach evaluation process. | <ul style="list-style-type: none"> CADRE of LEADS certified coaches Coach evaluation framework for LEADS 360 debriefings (individual and group) | Operations budget | X number of LEADS certified coaches in 2015/2016 Coached evaluation framework: November 2015 | Staff (AR) LEADS Coaches (C) Clients (C) Operations Council (ratifies new certified coaches) |
| ii. Develop and implement a LEADS facilitator certification process which is integrated with LEADS licensing framework | <ul style="list-style-type: none"> LEADS facilitator certification program in place | Operations budget | Program Approved: October 2015 First Cohort: January 2016 | Staff (AR) Operations Council (Ratifies) LEADS Consultants (CI) Potential faculty Governance Group (I) Clients (C) |
| iii. Develop a tracking system for certification renewal notifications | <ul style="list-style-type: none"> Tracking Process in place | Operations budget | December 2015 | Staff (A R) |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|---|--|--|--|--|
| iv. Refine LEADS Internal Facilitator certification program and develop evaluation framework | <ul style="list-style-type: none"> LEADS Internal Facilitator process complete | Operations Budget | December 31, 2015 | Staff (RA) LEADS Consultants (C) Clients (I) |
| v. Identify consulting service opportunities for the development of leadership capacity strategies and programs and match LEADS certified faculty and coaches to the opportunity. | tbd | Operations budget – not currently in budget – will need to add a budget line | | Staff Consultants |
| vi. Develop evaluation framework of LEADS consulting program | tbd | tbd | May 2016 | |
| vii. Contribute to the development of a LEADS licensing framework (by the LEADS Governance Group) and implement framework once framework is designed. | <ul style="list-style-type: none"> Contracts for LEADS licenses processed by LBU within 30 days of receipt. | Operations budget | December 2015 for process completion. Ongoing after that | Staff (R) CCHL (C) Margot Paterson (C) Governance Group (A) |
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| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
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| <i>c. Develop capacity to deliver key services in French</i> | | | | |
| i. Train at least 4 French-language LEADS faculty for delivery of LEADS Learning Series and Diagnostic Review | 4 French language LEADS faculty capable of delivering LEADS Learning Series and Diagnostic Review | \$ 33,000 (funding not available at present time Budget includes train the trainer documents and LEADS Learning series | Tbd (after review of LEADS learning series standard materials | Staff (A R) External translation services (R) LEADS Consultants (C) Clients © |
| ii. Actively recruit French – speaking LEADS coaches into certification process | 4 LEADS Certified coaches able to carry out LEADS 360 individual and group debriefings in French | Operations budget | November 2015 | Staff (RA) Translator (R) Coaches (C) |
| iii. Assist the LEADS Operations Council in the identification of translation priorities for LEADS service and coordinate translation process | | Varies by identified priority (see priority list) | Tbd by OPS Council | LEADS OPS Council (AC) Translations Services & Staff (R) Faculty and Clients (C) Governance Committee, CCHL Board, CHLNet (I) |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|---|---|---|----------|---|
| 3. Tools and Assessments | | | | |
| <i>a. Facilitate the creation of leadership development tools and assessments that help organizations integrate LEADS into practice, including tools that integrate the LEADS framework into the development of an organizational leadership strategy as well as succession planning, recruitment and retention, performance evaluation, change management and risk management at the individual and team, organization and system level.</i> | | | | |
| i. Provide framework for decision-making for priority development of tools that integrate the LEADS framework into succession planning, recruitment and retention, performance evaluation, change management (include time and resource requirements). | Decision-making framework | Operations | May 2015 | Staff (RA) |
| ii. Coordinate development of prioritized new tools; funded through LBU net revenue | Evidence-based tools that meet the needs of clients | Depending on priorities determined by OPS council | tbd | OC [C] Staff (RA) Consultants (C) |
| iii. Determine best way to provide small-size online learning opportunities for | tbd | tbd | tbd | |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|---|----------------------------|--------|----------|-----------|
| large audience (may involve strategic partnerships) and tbd facilitate access to these opportunities | | | | |
| <i>b. Identify priorities for and facilitate measurement of outputs and outcomes of LEADS-based leadership capacity development</i> | | | | |
| i. Provide recommendations that contribute to the development of quality standards for both internal and external LEADS-based leadership capacity development tools and assessments as developed by the governance committee. | tbd | tbd | tbd | tbd |
| ii. Contribute to the identification of priorities for and facilitate measurement of outputs and outcomes of leadership capacity development carried out by CHLNet. | tbd | tbd | tbd | tbd |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|---|---|-------------|--------------|--|
| 4. Accessible and efficient solutions-faced client services | | | | |
| <i>a. Ensure all services are solution-focused client-centered and geared to meet clients where they are at in their leadership capacity development journey.</i> | | | | |
| i. Develop and implement the LBU strategic and operation plans and business model | Approved LBU strategic plan 2015 – 2018 Approved LBU operational plan 2015- 2016 | n/a | May 2015 | Staff (RA) Operations Council Ratifies |
| ii. Develop an evaluation framework for LBU programs and services | | | | |
| iii. Develop a LBU Communications Plan | 2015 – 2018 Communications Plan | operational | October 2015 | Staff (R, A) Operations Council (C) CCHL Staff (C) |
| <i>b. Ensure sustainability of LBU work within a not-for-profit framework.</i> | | | | |
| i. Refine processes for efficiency, tracking and evaluation purposes. | tbd | tbd | tbd | tbd |
| ii. Develop LBU Marketing Plan | tbd | tbd | tbd | tbd |

| Priority Area and Actions | Key Performance Indicators | Budget | Timeline | Resources |
|--|--|-------------|---|-------------|
| <i>c. Develop and implement an evaluation strategy that encompasses the LBU services, the coaches, faculty and consultants to ensure the highest quality, evidence-based services and contribute to the gold-standard reputation of the LBU and the LEADS framework.</i> | | | | |
| i. Provide recommendations to develop and evaluation framework for current tools and assessments such as 360s and organizational diagnostics to ensure they meet the changing needs of the levels of the health system: individual and team, organization and system. | tbd | tbd | tbd | tbd |
| <i>d. Create and maintain a LEADS-based internal work environment to engage and empower the LBU Team.</i> | | | | |
| i. Conduct Team effectiveness Survey and develop team values | Statement of LBU Team Values coupled with behavioural statements | Operational | September 1, 2015 | Staff (R A) |
| ii. Develop individual goals that support LBU operational plan on a yearly basis | LBU Staff individual goals | Operational | July 15, 2015 Tbd for subsequent years | Staff (R A) |