

Session Number: SU213

THE LEADERSHIP JOURNEY AT REGENCE

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LEARNING OBJECTIVES:

- Identify the best practices of successful leadership development programs to use in designing or improving your leadership development program
- Select methods and approaches to use in selling a dynamic leadership development program to senior management
- Determine what measures might be important in demonstrating the results of your leadership programs

THE JOURNEY BEGINS

CURRENT STATE

- Sound foundation courses
- Good development opportunities and activities
- Perception of “training events”
- Learning often didn’t integrate into practice

DESIRED STATE

- Encourage leaders to develop a personal “leadership brand”
- Provide structure for integrating learning into practice
- Provide ongoing support during integration process
- Build a strong coaching and feedback network among participants

BEST PRACTICES

Successful leadership development depends more on consistent implementation of interdependent programs rather than on the use of any one specific innovative program. Key elements of our program:

- Systemic process
- Connect business strategies and program objectives
- Senior leadership support and participation
- Provide opportunities to translate learning into action over time
- Provide networking and coaching among peers
- Blended learning approach
- 360 degree feedback opportunities
- Focus on future competency needs
- Provide adequate guidance for follow-up and change
- Provide practical experiences
- Include time for reflection and discussion



The Leadership Journey Program Overview

TARGET AUDIENCE: Managers and above with six months service that have potential for promotion and professional level individual contributors in mentoring and coaching roles.

PROGRAM GOALS: Provide participants with an integrated set of leadership tools that will support leadership development and business transformation.

PROGRAM OVERVIEW:

Most leadership development programs consist of taking a class, trying to do things differently, having marginal success and reverting back to old ways. This program is different because it is designed to focus on the organization's values, employee and leadership core competencies and individual, group and organizational needs in a supportive learning environment. The year long program provides participants with an integrated set of leadership tools focusing on practical application, combining individual, classroom and on-the-job learning with community service, learning teams and ongoing coaching. This approach provides the time and support to integrate the tools into daily work and help each participant make the bridge into leadership.

By participating in this program, the individual will:

- Identify areas to grow and develop as a leader
- Discover high performance leadership behaviors and learn to leverage them
- Recognize how and when to adjust leadership styles
- Build consensus among peers for plans and projects
- Develop critical relationships, alliances and support systems to get results
- Engage and develop employees to get results
- Use powerful feedback and positive reinforcement techniques to maximize performance

ADMISSION TO THE PROGRAM:

The program is designed for managers and above with six months of service who have the potential for promotion and professional level individual contributors in mentoring and coaching roles. Admission to the program is nomination by an Executive or Senior Vice President. Each nominee will complete an application form identifying why he/she would like to attend the program and what improvements/results he/she will make as a result of the program prior to admission to the program.

2007 – 08 Dates	Segment Title	Content	In-Person	Online	On-The-Job
March 20 & 21	The Leadership Journey Kick-Off	<ul style="list-style-type: none"> • Program Introduction • Explore framework for developing leadership competence • Myers-Briggs Type Indicator debrief (emphasis on leadership) 	<ul style="list-style-type: none"> • Two-day in-person workshop 	<ul style="list-style-type: none"> • MBTI taken online prior to event 	

2007 – 08 Dates	Segment Title	Content	In-Person	Online	On-The-Job
April/May	Learning About Ourselves	<ul style="list-style-type: none"> • Arrival of the Competencies • Career Anchors • VOICES 360 assessment • Situational Leadership II • Develop individual program goals 	<ul style="list-style-type: none"> • VOICES 360 debrief one-on-one debrief with certified feedback facilitator 	<ul style="list-style-type: none"> • Situational Leadership II • Arrival of the Competencies 	<ul style="list-style-type: none"> • Develop individual program goals
May 30 & 31	Teaming for Success	<ul style="list-style-type: none"> • Aggregate VOICES 360 debrief • Explore effective team leadership behaviors • Cultural competency • Form Coaching Teams • Teach Situational Leadership II concepts to direct reports • Negotiation 	<ul style="list-style-type: none"> • Two-day in-person workshop 		
June/July/ August	Developing Ourselves and Others	<ul style="list-style-type: none"> • Work in Coaching Teams • Conduct development planning discussions with direct reports • Teach Situational Leadership II concepts to direct reports • Complete Resolving Interpersonal Issues and Retaining Talent 		<ul style="list-style-type: none"> • Resolving Interpersonal Issues • Retaining Talent 	<ul style="list-style-type: none"> • Coaching Teams • Development discussions • Teaching Situational Leadership II
Oct. 8 & 9	Building Bridges	<ul style="list-style-type: none"> • Explore concepts of influencing others, transition management, conflict management, problem solving, and creativity 	<ul style="list-style-type: none"> • Two-day in-person workshop 		
Oct/Nov/Dec	Navigating the Journey	<ul style="list-style-type: none"> • Work in Coaching Teams • Conduct mini-360 assessments • Finish any incomplete activities 	<ul style="list-style-type: none"> • Work with feedback facilitator to conduct mini-360 assessments 		<ul style="list-style-type: none"> • Work in coaching teams • Finish any incomplete activities • Decide whether or not to serve as a coach to new program participants
January 16	Celebrating The Journey	<ul style="list-style-type: none"> • Share successes and challenges • Putting it all together activities • Graduation 	<ul style="list-style-type: none"> • One-day in-person workshop 		

SELLING YOUR PROGRAM

The core business challenge is: <i>(Describe the problem to be solved.)</i>	
Our Answer	Your Answer
<p>Regence leaders need an integrated set of leadership tools and experiences that will support leadership and business transformation. Regence Organizational Development has developed an innovative leadership development program, open to managers and above that focuses on practical application, combining individual learning, classroom and on-the-job learning with community service and ongoing coaching. This approach provides a structure for integrating many learning experiences over time to engrain new thinking and behaviors into everyday work.</p>	
This supports our core strategies, key initiatives and core competencies by: <i>(Explain the linkage and alignment with core strategies and key initiatives.)</i>	
Our Answer	Your Answer
<p>The program is designed around the organization's values, employee core competencies and leadership core competencies and facilitates learning in an active learning environment. The program provides participants with an integrated set of leadership tools. Learning teams and ongoing coaching provide the time and support to integrate the tools into daily work and help individuals navigate leadership challenges. The structure of the program reinforces the cause, core strategies and key initiatives and builds transfer of knowledge from participants to their direct reports. While the overall program is designed to help individuals live and own the cause, with mastery of leadership principles, participants will learn to engage and develop their employees to maximize performance.</p>	

This is a business imperative now because: *(Why does this have to be done now?)*

Our Answer

Leadership makes a difference in performance, excellence, achievement and knowledge in an organization. One of the goals of The Leadership Journey program is to provide Regence management with the skills and tools they need to develop and lead their teams.

In the tightening labor market, an integrated leadership development program will help retain the best and brightest of our management employees. The program will help participants expand their knowledge of the organization across business areas and provide Regence with another way to maximize leadership potential and fill our leadership pipeline.

Your Answer

The target audience is: *(Please include who and how large the target audience is.)*

Our Answer

Managers and above with six months service that have potential for promotion and professional level individual contributors in mentoring and coaching roles. Participants will be nominated by Executive and Senior Vice Presidents. Each nominee will complete an application form identifying why he/she would like to attend the program and what improvements/results he/she will make as a result of the program prior to admission to the program.

Selection criteria may include previous performance review ratings, ability to commit to attending all scheduled program workshops and full participation in self-paced program activities and appropriate geographic/affirmative action mix, as required.

Your Answer

The relative importance of implementing this curriculum relative to existing training curriculum is: *(While strict ROI analysis and comparisons are not often feasible or desirable, attempt to define outcomes, how those outcomes will be measured, the cost of developing/implementing the training and the cost or risk of not developing/implementing the training.)*

Our Answer

This curriculum will provide an opportunity to help our leaders develop the skills they need to achieve our cause, core strategies and key initiatives.

Program effectiveness will be measured in several ways. Proposed measures include:

- Participant retention at Regence.
- Pre and post assessment of leadership behaviors using the Leader Behavior Analysis (LBA-II) and/or mini-Voices assessment.
- Each participant will identify and report personal leadership development goals and measures of success.

Cost of developing the materials will be time of two consultants for about two weeks. There will be some costs in conducting MBTI (\$15/individual), VOICES 360 (\$225/individual and copying materials.) If outside facilities are used, there would be facility costs. Another cost of the program will be the participant's time. While there will be individual variations, it is anticipated that the program will take about 90 hours or one day per month of a combination of work and/or personal time.

Your Answer

Additional Consideration:

Your Answer:

MEASURING SUCCESS

WHY MEASURE:

- Align programs to business needs
- Show contributions of selected programs
- Earn respect of senior management / administrators
- Build staff morale
- Justify / defend budgets
- Improve support for programs
- Enhance design and implementation processes
- Identify inefficient programs that need to be redesigned or eliminated
- Identify successful programs that can be implemented in other areas

WHAT TO MEASURE: *(Measurement methodology was developed using Jack Phillips' ROI Institute model. Contact ROI Institute at 205-678-8101 or www.roiinstitute.net)*

- √ Reaction, Satisfaction and Planned Action
- √ Learning
- √ Application and Implementation
- √ Business Impact
- √ Return on Investment
- √ Intangible Measures

HOW TO MEASURE: *(Measurement methodology was developed using Jack Phillips' ROI Institute model. Contact ROI Institute at 205-678-8101 or www.roiinstitute.net)*

DETERMINE MEASURES AND DEVELOP BASELINE DATA	MATCH EVALUATION LEVELS WITH OBJECTIVES	DETERMINE EVALUATION INSTRUMENTS TO USE	DETERMINE DATA SOURCES TO USE	DETERMINE EVALUATION TIMING
<ul style="list-style-type: none"> • Measures based on objectives • Hard measures • Soft measures • Capture baseline data • Forecast ROI as necessary 	<ul style="list-style-type: none"> • Level 1: Reaction, Satisfaction and Planned Action • Level 2: Learning • Level 3: Application and Implementation • Level 4: Business Impact • Level 5: Return on Investment 	<ul style="list-style-type: none"> • Questionnaires • Surveys • Tests / demonstrations • Interviews • Focus groups • Observations • Performance records 	<ul style="list-style-type: none"> • Organizational performance records • Participants • Supervisors of participants • Subordinates of participants • Senior management • Team / peer group • Internal / external group 	<ul style="list-style-type: none"> • Availability of data • Ideal time for application (Level 3) • Ideal time for business impact (Level 4) • Convenience of collection • Constraints on collection

Data Collection Plan

LEVEL	OBJECTIVES	MEASURES/DATA	DATA COLLECTION METHOD	DATA SOURCES	TIMING	RESPONSIBILITY
1 – Reaction / Satisfaction	<ul style="list-style-type: none"> Participants rate the program as relevant to their jobs Participants rate the program as important to their job success 	<ul style="list-style-type: none"> 3 or higher on 4 point score 	<ul style="list-style-type: none"> Survey 	<ul style="list-style-type: none"> Participant 	<ul style="list-style-type: none"> After each program segment Completion of program 	<ul style="list-style-type: none"> OD
2 -Learning	<ul style="list-style-type: none"> Participants demonstrate acceptable performance on each major competency or topic 	<ul style="list-style-type: none"> 25% or greater improvement 	<ul style="list-style-type: none"> Pre and post assessment Self assessment 	<ul style="list-style-type: none"> Facilitator / Peer Participant 	<ul style="list-style-type: none"> Completion of program 	<ul style="list-style-type: none"> OD Participant
3 – Application / Implementation	<ul style="list-style-type: none"> Participants utilize the competencies with team members on a routine bases 	<ul style="list-style-type: none"> Frequency of use Examples Barriers to use Enablers to use 	<ul style="list-style-type: none"> Action plan Survey OTJ observations Self assessment 	<ul style="list-style-type: none"> Participant Team member Peer Manager 	<ul style="list-style-type: none"> After each program segment Completion of program 	<ul style="list-style-type: none"> OD Participant Peers Manager Team/direct reports
4 – Business Impact	<ul style="list-style-type: none"> Participants and team members drive improvements in a min. of 2 key initiatives or department objectives 	<ul style="list-style-type: none"> Positive impact on production and competencies Examples 	<ul style="list-style-type: none"> Survey 	<ul style="list-style-type: none"> Participant 	<ul style="list-style-type: none"> Completion of program 	<ul style="list-style-type: none"> Participant Manager
5 – ROI	<ul style="list-style-type: none"> Achieve a 25% ROI 	<ul style="list-style-type: none"> Examples 	<ul style="list-style-type: none"> Action plan 	<ul style="list-style-type: none"> Participant 	<ul style="list-style-type: none"> Completion of program 	<ul style="list-style-type: none"> OD Participant

Data Collection Plan Template

LEVEL	OBJECTIVES	MEASURES/DATA	DATA COLLECTION METHOD	DATA SOURCES	TIMING	RESPONSIBILITY
1 – Reaction / Satisfaction						
2 – Learning						
3 – Application / Implementation						
4 – Business Impact						
5 – ROI						

SAMPLE SURVEY QUESTIONS

REACTION - SATISFACTION

- I did recommend the program to others.
- The program was a worthwhile investment for my organization.
- The program was a good use of my time.
- The program was a good use of member / stockholder / taxpayer funds.
- The program was relevant to my work.
- The program was important to my work.
- The program provided me with new information.

LEARNING

- I learned new knowledge/skills from this program.
- I am confident in my ability to apply the knowledge/skills from this program.
- Rate your level of improvement in skill or knowledge derived from the program content.

APPLICATION

- To what extent did you apply the knowledge/skills learned during the program?
- How frequently did you apply the knowledge/skills learned during the program?
- What is your level of effectiveness with the knowledge/skills learned during the program?
- What percent of your total work time did you spend on tasks that require the knowledge/skills presented in this program?
- On a scale of 0% (not at all) to 100% (extremely critical) how crucial is applying the content of this program to your job success?

OUR QUESTIONS

- Which of the Core Strategies does the Leadership Journey positively impact? (select all that apply from inserted list)
- The session addressed issues that are important to my work. (select one from a four point scale)

OUR QUESTIONS

- How confident are you in your ability to apply the knowledge/skills learned from the session? (select one from a five point scale)
- How much did your knowledge or skill increase as a result of the session? (select one from a percentage scale)

OUR QUESTIONS

- How frequently do you apply/use the knowledge you've gained so far? (select one from a four point scale)
- Please provide an example illustrating how you've used your new knowledge or skills. (open text box)
- What percentage of your total work time do you spend on tasks that require the knowledge/skills presented in this session? (select one from a percentage scale)
- How important is applying the content of this session to your success? (select one from a four point scale)

SAMPLE SURVEY QUESTIONS

BARRIERS / ENABLERS TO APPLICATION

- Did you perceive barriers in applying the knowledge/skills learned in this program?
- Which of the following deterred or prevented you from applying the knowledge/skills learned in this program? (insert potential barriers)
- Which of the following supported you in applying knowledge/skills learned in the program? (insert potential enablers)

IMPACT

- To what extent did the program positively influence the following measures? (insert potential measures)
- What other measure was positively influenced by the program?
- Of the measures listed above, which one is most directly linked to the program? (insert potential measures)
- Please define the measure most directly linked to the program and its unit for measurement. For example, if you selected “sales” your unit of measure may be “the number of closed sales.”
- For the measure most directly linked to the program, what is the monetary value of the measure?
- For the measure most directly linked to the program, how much has this measure improved in performance?
- How frequent is the measure most directly linked to the program?

ROI

- What is the annual value of improvement in the measure you selected above?
- Recognizing that other factors could have influenced this annual value of improvement, please estimate the percentage of improvement attributable to the program.
- What confidence do you place in the estimates you have provided?
- Please estimate your direct costs of travel and lodging for your participation in the program.

OUR QUESTIONS

- Which, if any, of the following deterred or prevented you from applying the knowledge/skills learned? (select all that apply from inserted list)
- Please provide any additional comments on your answer above. (open text box)
- Which, if any, of the following supported you in applying the knowledge/skills learned? (select all that apply from inserted list)
- Please provide any additional comments on your answer above. (open text box)

OUR QUESTIONS

- Which measures were positively influenced by the session? (select all that apply from inserted list)
- For the items that were positively influenced, please provide an example, if possible. (open text box)
- Which competencies did this session help you develop? (select all that apply from inserted list)
- For the competencies you selected, please explain how the program helped you with your development. (open text box)
- Which session topics were most useful to you in identifying potential areas to grow and develop as a leader? (select all that apply from inserted list)

Our ROI data is drawn from action plan reports by the participants.

(Measurement methodology was developed using Jack Phillips' ROI Institute model. Contact ROI Institute at 205-678-8101 or www.roiinstitute.net)

ROI DATA COLLECTION

DATA ITEMS	METHOD FOR ISOLATING EFFECTS OF THE PROGRAM	METHODS OF CONVERTING DATA TO MONETARY VALUES	COST CATEGORIES	INTANGIBLE BENEFITS	COMMUNICATION TARGETS FOR FINAL REPORT	OTHER INFLUENCES / ISSUES DURING APPLICATION	COMMENTS
Varies depending on measures selected	<ul style="list-style-type: none"> • Participant estimate 	<ul style="list-style-type: none"> • Standard value • Expert value • Participant estimate 	<ul style="list-style-type: none"> • Needs assessment • Program development • Guest speaker fees • Materials • Facility rentals • Meals and refreshments • OD facilitators and coordinator • Participant salaries and benefits – for time involved in program • Travel costs 	<ul style="list-style-type: none"> • Increased ability and confidence • Increased job satisfaction • Improved teamwork • Improved communication • Reduced employee relation issues • Increased employee engagement • Increased recruiting and retention ability • Increase member satisfaction 	<ul style="list-style-type: none"> • Participant • Participant's manager • Senior Planning Group • Senior Execs • Future participants 	<ul style="list-style-type: none"> • Multi-year business system integration being implemented 	<ul style="list-style-type: none"> • Need to get measures and data from participants

RETURN ON INVESTMENT CALCULATION *

$$\text{ROI} = \frac{\text{NET TOTAL BENEFITS}}{\text{TOTAL COSTS}}$$

$$\text{ROI} = \frac{\text{BENEFITS} - \text{PROGRAM COSTS}}{\text{PROGRAM COSTS}}$$

$$\text{ROI TO DATE}^* = \frac{\$138,375 - \$19,170}{\$19,170} = \frac{119,205}{19,170} = 621\%$$

$$\text{EST. ROI} = \frac{\$2,075,625 - \$314,180}{\$314,180} = \frac{1,761,445}{314,180} = 560\%$$

* THIS IS INCOMPLETE SAMPLE DATA ONLY

PARTICIPANT	ANNUAL IMPROVEMENT* (1)	MEASURE (2)	CONTRIBUTION FROM PROGRAM (3)	CONFIDENCE ESTIMATE (4)	ADJUSTED VALUE (1 x 3 x 4)
#1	\$25,000	SALES	60%	80%	\$12,000
#2	\$150,000	REDUCED TURNOVER	75%	90%	\$101,250
#3	\$75,000	INCREASED EFFECTIVENESS	45%	75%	\$25,125
ADD #4 - 50					
TOTAL BENEFITS**					\$138,375

** THIS TOTAL BENEFIT ESTIMATE IS BASED ON THREE PARTICIPANT EXAMPLES FOR YEAR TO DATE RESULTS.

2007 LEADERSHIP JOURNEY PROGRAM COSTS					
	FACILITIES & FOOD	SPEAKERS	PARTICIPANT MATERIALS	FACILITATOR & PARTICIPANT COSTS***	TOTAL COSTS
PROGRAM COSTS	\$18,000	\$6,000	\$56,900	\$233,280	\$314,180
PER PARTICIPANT COST	\$200	\$67	\$1,263	\$4,860	\$6,390

*** THIS ESTIMATE IS BASED ON THREE PARTICIPANT AND FACILITATOR COSTS @ \$54 PER HOUR FOR YEAR TO DATE PARTICIPATION COSTS.

SAMPLE

STARTING YOUR JOURNEY

THINGS TO CONSIDER	YOUR LEADERSHIP DEVELOPMENT PROGRAM PLANS
WHAT IS CURRENT STATE OF LEADERSHIP DEVELOPMENT? WHAT IS WORKING? NOT WORKING? WHAT ARE INTERNAL BEST PRACTICES? EXTERNAL BEST PRACTICES?	
WHAT IS THE DESIRED STATE OF LEADERSHIP DEVELOPMENT? WHAT ARE THE CRITICAL BUSINESS NEEDS? WHAT FUTURE KNOWLEDE / SKILLS / COMPETENCIES WILL BE NEEDED TO MEET BUSINESS NEEDS?	
WHO NEEDS TO "BUY IN" TO THE PROGRAM? APPROVE THE PROGRAM? WHO WILL BE A CHAMPION WITH THE SENIOR LEADERS? APPROVE THE BUDGET? WHAT TRAVEL CONSIDERATIONS EXIST?	
WHAT ARE THE MEASURES OF SUCCESS FOR THE PROGRAM? WHAT DATA IS AVAILABLE TO ESTABLISH A BASELINE? HOW WILL FUTURE DATA BE COLLECTED? WHO WILL THE DATA BE REPORTED TO? IN WHAT FORMAT?	
WHAT MANAGEMENT SUPPORT WILL BE REQUIRED? HOW WILL SENIOR MANAGEMENT BE INVOLVED IN SUPPORTING THE PROGRAM?	
WHO IS THE TARGET AUDIENCE? HOW WILL THEY BE RECRUITED? HOW WILL THEY BE SELECTED?	
WHAT ASSESSMENT PROCESSES / METHODS WILL BE USED WITH PARTICIPANTS? HOW WILL PROGRAM FEEDBACK BE COLLECTED? HOW WILL PROGRAM FEEDBACK BE INCORPORATED?	
WHAT TOPICS SHOULD BE COVERED? WHAT RESOURCES / MATERIALS ARE CURRENTLY AVAILABLE? NEED TO BE LOCATED? WHAT DELIVERY METHODS WILL BE USED? HOW WILL LEARNING STYLES BE ADDRESSED?	
WHO ARE THE CURRENT SUBJECT MATTER EXPERTS? FUTURE SUBJECT MATTER EXPERTS? CURRENT FACILITATORS AND COACHES? FUTURE FACILITATORS AND COACHES? POTENTIAL GUEST SPEARKERS?	
WILL THE PROGRAM BE HELD ON SITE? OFF SITE? WHAT AV EQUIPMENT WILL BE REQUIRED? WHAT FOOD AND REFRESHMENTS WILL BE PROVIDED?	
HOW WILL PROGRESS IN THE PROGRAM BE TRACKED? HOW WILL LEARNING BE REINFORCED? REWARDED?	