A message from the editor

As the year draws to a close, the latest edition of the Portsmouth Business School HR Bulletin presents work drawn from academic faculty, students and practitioners. I am delighted to include a range of topics that I hope will stimulate debate and curiosity.

The first article discusses women in leadership, considering some of the barriers women face in the workplace and acknowledging that the issue requires a collective, supportive approach to provide the framework and initiatives that will give women the confidence to advance to senior leadership positions.

Our next piece investigates the value of executive coaching and the third article is inspired by one of our students. This research highlights the tension which can exist regarding fairness and quality in the relationship between those involved in both sides of the performance appraisal system.

Next, we turn to a legal overview of the challenges in ill-health and capability dismissals provided from practitioner perspective. The penultimate article explores the commercial awareness amongst managers within the Further Education setting and how this can create challenges between the delivery of quality education and financial imperatives. Finally, we have included a bonus article regarding the development of change agents in the NHS using on-line learning.

The editorial is a team effort and I would once again like to acknowledge and thank all those involved in the production of the bulletin.

We welcome contributions from academia, industry and other areas of practice. If you would like to contribute to the spring edition, please do not hesitate to contact me to discuss your ideas.

Liza Howe-Walsh
Editor
liza.howe-walsh@port.ac.uk

To view previous issues of the HR Bulletin, please use the following website address:
http://www.port.ac.uk/research/pbsmeansbusiness/businessservices&researchnewsletters

Editorial team
Fiona Wingett: fiona.wingett@myport.ac.uk
Michele Towell: michele.towell@port.ac.uk
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The argument for greater gender diversity in corporate leadership positions has taken centre stage in recent years. There are now more women on the UK’s FTSE 350 boards than ever before, with the representation of women more than doubling since 2011. The FTSE 100 boards now comprise 26.1% of women with 19.6% on FTSE 250 boards (Davies, 2015). In addition, there are record numbers of women in the British workforce, with 74.5% of working age women now in employment (ONS, 2015) and a rapidly rising number of women becoming self-employed (ONS, 2016). So is the battle won?

A five year review of the Government’s campaign to get more women on boards states that “Britain is beginning to see the full extent of female talent unleashed” which is “good for boards, good for business and good for the economy” (Davies, 2015).

A growing body of evidence links gender balance in leadership to better organisational performance and corporate governance (McKinsey & Company, 2016). At a national level, equalising women’s productivity and employment to the same levels as men’s could add £600 billion to the UK economy, clearing a third of our national debt (Women’s Business Council, 2015) and advancing women’s equality could add $12 trillion to global GDP by 2025 (McKinsey Global Institute, 2015).

So the advancement of women has become a business issue and is no longer just an issue of equality or gender. Lord Davies comments that few British business leaders now ask why we need more women at the top. Instead, the question is how more women in leadership positions might be achieved? So far, voluntary, business-led changes have led to the increasing numbers of women on boards in the UK, but to encourage more rapid change the original ambition of women representing 25% of board members has now been raised to a target of 33% by 2020 and has been broadened to the entire FTSE 350 (Great Britain. Government Equalities Office, 2016).

Whilst change at the top is rightly applauded, the UK Government, The Chartered Institute of Personnel and Development and the Women’s Business Council all recognise greater levels of support at every level must be in place if the potential of more women is to be realised. This view is supported by the findings of a study conducted by the Judge Business School (Nadkarni & Oon, 2015), which suggests that the success of women in one strata is connected to, and reinforced by, the success of women in another. Sir Philip Hampton, Chairman of GlaxoSmithKline, was appointed in 2016 to widen the talent pipeline for female executives in the UK and create potential board directors of the future.

Recent evidence also suggests women need support even earlier in their lives. Girls tend to do well at school, but this does not always translate into their ambitions for the future. A recent women’s leadership study conducted by KPMG (2015) found that the journey to female leadership starts much earlier than executive level and is defined by key influences throughout life. Their study identified what they see as a critical disconnect i.e. women want to lead, but something is holding them back.

Understanding what that might be and how barriers may be overcome is critical to providing the right support. Whilst there is strong evidence that many barriers are institutional, there may also be other factors at play. KPMG (2015) refers to the socialisation of leadership, citing the messages women receive early in their lives as having a profound effect on their view of leadership throughout their career. In particular, 86% of the women they asked said they were taught to be nice to others when they growing up.
with only 34% reporting that they were encouraged to share their point of view. One respondent commented that it would have been great to learn how to be nice and be a leader at the same time.

Ibarra, Ely and Kolb (2013) comment on the particular challenge for women of integrating leadership into their core identity. They perceive a culture which is, “deeply conflicted about whether, when, and how [women] should exercise authority”. When women display attributes considered desirable for business leadership including self-reliance, assertiveness and a strong personality, they are seen to be subverting prevailing gender stereotypes and seen as less likeable or hireable (Rudman & Phelan, 2008). LeanIn and McKinsey & Company (2016) provide further illustration: they found that women who negotiate for a promotion or pay increase are 30% more likely than men to receive feedback that they are “bossy”, “too aggressive,” or “intimidating.” Women faced with this backlash must choose whether to be respected or liked, but not often both (Ibarra et al., 2013). Consequently, women in business are often hesitant to use assertive behaviours, including self-promotion, to seek advancement.

Smith and Huntoon (2014) found that whilst young women will happily extol the virtues of another woman, they are reluctant to promote themselves and violate the “modesty norm” for their gender. Similarly, Bolino and Turnley, (2003) found that women in organisational settings are more passive than men in managing how they are perceived, but climbing the career ladder is a necessarily competitive business. Individuals who are reluctant to make themselves visible, are less likely to make it to the top, especially at a time when the discourse of personal branding is now pervasive amongst employees (Vallas & Cummins, 2015) and considered essential to career progression.

Whilst negotiating gender norms is part of what is holding women back, confidence is also cited as a key issue for women by both KPMG and the Institute of Leadership and Management (ILM, 2013) who report that just 50% of women have high, or quite high levels, of self-confidence compared to 70% of male managers. In addition, half of women managers admit to feelings of self-doubt, compared with only 31% of men (ILM, 2013 ). Numerous studies show that women are more cautious than men in applying for jobs or promotion, so this crisis of confidence affects, firstly, women’s ambitions and, ultimately, their achievements.

The issue of confidence persists, even when women gain seniority. As women advance, they find themselves increasingly outnumbered by men, requiring them to develop even greater levels of self-confidence in order to exert influence (CIPD, 2015). Whilst men attribute success to their intelligence or abilities, women attribute success to external factors such as receiving help or simply luck. This inability to internalise success can also lead to Imposter Syndrome (Clance & Imes, 1978). Many women in leadership speak of a fear of being “found out” and exposed as an imposter. So it would seem that what is holding women back goes beyond institutional issues and will require cultural change from the schoolroom to the boardroom.

So despite initiatives to help more women reach the top, women are still less ambitious and less confident than men. However, simply encouraging women to go for leadership, without addressing the often fragile experience of becoming a female leader, is missing the point. Sixty-seven per cent of women reported needing support in building the confidence to feel they can be leaders (KPMG, 2015), leaving a clear opportunity for employers to think beyond standard leadership programmes and offer more creative approaches to this crisis of confidence.

Firstly, role models and mentors are identified as key markers for aspiring female leaders. Whilst a KPMG study (2015) found that 82% of professional women believe access to female leaders will help them advance their career, nearly 80% said they lacked the confidence to ask for access to senior leadership. Employers can easily help to facilitate connections by raising the profile, voice and visibility of the women leaders already in post across their organisations.

Put women together, create safe settings in which women can identify and network with other women inside their organisation and these
opportunities can help to leverage the experience of successful women and connect them with aspiring female managers. Forging a network of peers can also help women to candidly discuss the experience of becoming a leader and how to navigate internal politics and practices.

Whilst many HR departments have now implemented mentoring and coaching schemes, more creative approaches to matching women with mentors and coaches could be undertaken. An in-house agency approach or internal speed dating events can be useful, as can looking outside the business for appropriate mentors. Involving managers of both sexes can also increase awareness of unconscious bias and mutual understanding of the issues women face. Relationships and connections made in this way are vital as more than half of working women say it is encouragement from mentors and leaders rather than traditional rewards which most influences their perception of themselves in the workplace (KPMG, 2015).

If confidence holds women back then social media might provide less threatening opportunities for women to achieve visibility. Developing as a thought leader around a particular topic is a creative option for women and Twitter and LinkedIn provide effective platforms to build a professional profile. Becoming recognised for expertise can boost a woman’s confidence and build her reputation within an industry. Although opportunities abound, Harris and Rae (2011) describe a digital divide between those who have the skills and confidence to use these tools and those who do not. In their view, those who have them will have greater access to career opportunities. This might be one area where tailored training for women may be a useful intervention.

Perhaps surprisingly, some companies are also turning to public speaking as a means of boosting women’s self-confidence and advancing their careers. Speaking about a given topic can increase visibility, but research shows that women are less likely than men to volunteer for public speaking opportunities even when they are more qualified. Women with Voices, is helping women build their self-confidence whilst Ginger Public Speaking is bringing women from different industries together. They are developing programmes to help women give voice to their thought leadership, sharpen their sense of purpose and increase their influence. Another initiative, Speakers for Schools, is working to influence girls early in their lives.

In fact, supporting women to connect to a bigger sense of purpose could help shift focus away from their insecurities and encourage them to go outside their comfort zone in service of what needs to be said. Even small successes in speaking out and being heard can greatly boost confidence and visibility. Access to public speaking training could be an unlikely and innovative intervention for organisations wanting to help women shape their leadership identity.

However, acknowledgement of the issue itself may be the most important step in tackling it, even amongst women. Many women have worked hard to take gender out of the equation and are still uneasy about being seen as a special case, while others report being unaware of deliberate intentions to exclude them. Instead, women report subtle details in their workplaces which create a culture in which women fail to thrive or reach their full potential (Ibarra et al., 2013). Openly discussing and honestly examining these details calls for collective efforts and cannot be left to individual HR departments to resolve.

The ILM recommends that all senior leaders take urgent ownership of the issue, making their company’s talent pipeline a commercial priority and proactively identify, develop and promote high potential people, not just women. This may be true but removing the barriers that get in women’s way will require a more gender-intelligent approach and demands recognition that the path to leadership for women starts early in life, may not follow the male norm and requires creative and innovative approaches.

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**Biography**

Helen Thompson-Whiteside is a Senior Lecturer in marketing at the University of Portsmouth, having previously worked in marketing in the public and private sectors for more than 25 years. She specialises in public speaking coaching and training and her current research areas are in female entrepreneurship and leadership, particularly in the creative industries.
This article reports on recent research undertaken at the University of Portsmouth Business School that investigated the student perspective of the value of executive coaching delivered on the School’s part-time Executive MBA course. The growth in interest of the role of coaching in postgraduate, post-experience programmes, including the MBA and DBA, is perhaps not surprising given the nature of these programmes and profile of the students they attract (Cook, Nichol & Loon, 2015).

Coaching challenge in Higher Education
The role of coaching in Higher Education (HE) is a relatively new phenomenon. Following its introduction in the US, where a number of studies on models and effectiveness of coaching in US institutions have been reported (Bettinger & Baker, 2011; McWilliams & Beam, 2013), coaching is gaining recognition in the UK as a developmental intervention, both for academics and students.

It is evident from the bodies responsible for specifying standards for HE courses, e.g. the Quality Assurance Agency for Higher Education (QAA, 2015) and the Association of MBAs (AMBA, 2013), that the development and demonstration of interpersonal, or ‘soft’, skills is highly relevant pedagogically to support learning and application of knowledge. These skills include communication, leading teams, personal leadership development, group work, influencing others, lifelong learning, and personal development. The Executive MBA (EMBA) is typically described as being transformational - meaning transformational on an individual learning level and preparing learners to transform the organisations in which they work (AMBA, 2013).

Given the expectations of the stakeholders in HE and, specifically, postgraduate, post-experience EMBA courses, and the highly competitive nature of this market, two important questions for providers are: how well equipped are institutions to fulfil stakeholder expectations, and, how can institutions position themselves to effectively compete to attract students given the relevance of personal development in supporting effective teaching and learning? The provision of learner support and development provides an opportunity for institutions to differentiate themselves in a crowded and highly competitive market which demands relatively high fees.

Coaching is defined as “evoking excellence in others” (Flaherty, 1999) and can “enable learning and development to occur and thus performance to improve” (Parsloe, 2009). Coaching has been recognised as a $2 billion per year global market (Fillery-Travis & Lane, 2006) and is reported as being used in 70% of organisations in the UK with 44% of employees being offered coaching (Global Coaching Survey, 2009; Day, Surtees & Winkler, 2008). A wide variety of coaching genres, techniques and styles exist which contribute to coaching being seen as a key tool for developing people in organisations. Its use with students in Higher Education is relatively new and there are few empirical studies to draw evidence of participation or success from.

Executive coaching on the Portsmouth MBA
An innovative executive coaching scheme was piloted at the University of Portsmouth Business School in 2015 on the Executive MBA course. The scheme was developed as a collaboration between the school and The Performance Coach (TPC), a global force in leadership and coaching development. Engaging EMBA students in executive coaching, using coaches requiring practice hours, presented an exciting pro bono
opportunity for all stakeholders. As a result of positive feedback from students who participated in the pilot scheme, executive coaching is now embedded in the new Executive MBA course introduced in September 2016, as a component of a unit that focuses on professional development.

Research aim and objectives
This interim research set out to establish the value of the pilot executive coaching scheme from a student perspective, investigating the benefits (or otherwise) that have been experienced by students who engaged in the scheme. Insight into these students’ attitudes towards executive coaching in future was also explored.

The findings were based on in-depth, qualitative interviews with six students who are currently studying for the MBA. The key research questions are:

- What is the perceived value of coaching as an educational development intervention?
- What is the perceived value of coaching as an intervention for improving performance in the workplace?
- What is the perception of the value of coaching in a postgraduate, post-experience, higher education learning setting?

This research attempts to provide empirical evidence from a qualitative study on how a group of students on an EMBA programme perceived the value of executive coaching based on the aim and objectives above.

Methodology
The research adopted an interpretivist approach, utilising semi-structured interviews in order to capture a rich data set comprising participants’ perceptions, views and personal insights.

Findings
The data was analysed around emerging themes. Results indicate the provision of executive coaching in this instance had little impact on the student’s educational attainment. While this finding was not expected, it highlighted the nature of coaching which is for the coachee (the student) to drive the topic of conversation. However, respondents suggested some non-direct benefits in terms of improved confidence and increasing self-awareness. They reported a range of positive impacts on skills necessary for their workplace roles, for example, decision-making, questioning, time management, and thinking styles. In addition, they recognised the effect coaching had on improving their confidence and their abilities to consider the impact leadership behaviours may have on people in their workplaces. Finally, the students who participated in this research valued the inclusion of executive coaching on their executive level HE education programme, would recommend its inclusion to others and indicated their support for its continuation.

Conclusions
The provision of executive coaching on the Executive MBA course at the University of Portsmouth is proving to be valuable addition to the development of leaders and managers. In respect of the original objectives of this study the following observations are explored below.

The data collected demonstrates the use of executive coaching as a developmental intervention for improved people management skills, thereby negating the criticism of some EMBA programmes as evidenced by Bennis and O’Toole (2005) and Benjamin and O’Reilly (2011). However, this assertion assumes participants choose to raise issues relating to managing people. As was asserted earlier, the choice of topic is dependent on the coachee and should not be influenced by the provider or sponsor for executive coaching. In terms of perceived values for improving study skills, or other aspects associated with studying, these issues were not raised within the sampled coaching conversations. There are, of course, other facilities within the University of Portsmouth for helping students with these issues. This was supported by several of the respondents, who also suggested their development of other skills, such as decision-making, time management and questioning, will ultimately help their overall
development on the EMBA programme.

In respect of the value of coaching for improving workplace performance, there is strong evidence to support the use of executive coaching. The key areas impacted include decision-making, thinking styles, questioning skills, implementation of theoretical concepts in the workplace, self-reflection, removal of self-doubt as confidence increases and increased self-awareness, thereby encouraging leaders and managers to consider the impact of their behaviour on others.

The perception of the value of executive coaching being included on an executive MBA programme was extremely positive and highly recommended by the students who had experienced it and participated in this research.

**Future developments**

The sample for this initial research is small but is a starting point for on-going data collection from other cohorts completing the Executive MBA at Portsmouth Business School. As the programme consists of only two cohorts, there has been no opportunity to investigate any post-course benefits of the executive coaching and its longer term impact on workplace performance. Therefore, it is intended to continue with the data collection and develop a research focus that includes the experience of coaches.

**References**


**Biography**

**Dr. David Hall** is MBA Director and Principal Lecturer at the University of Portsmouth Business School. Before entering HE, David worked in management and consultancy in the private sector. David’s main interest is in how team and individual performance is influenced by management behaviour and in areas of cross over between sport and business.

**Dr. Michele Towell** is a Senior Lecturer in organisational studies and human resource management at the University of Portsmouth. Michele is a course leader for Postgraduate Masters programmes and her research interests include executive coaching and managerial learning. She has worked in Higher Education for 10 years following a successful career in Rolls-Royce plc in a variety of HR (Learning and Development) and line management roles.
Performance Appraisal Systems (PAS) have become an intrinsic part of business culture, supposedly offering opportunities to enhance the effectiveness of human resources decisions and to provide employees with feedback on their performance. However, this is rarely achieved satisfactorily. Employees often feel discouraged by the experience and dissatisfied by a process which measures their performance without any contextualisation and which merely serves administrative requirements (McGivern & Ferlie, 2007).

Whilst PAS have been widely researched, few studies have discussed the complexities of PAS in small and medium-sized enterprises (SME). This literature suggests that much of the discontent lies in the appraiser-appraisee relationship. Personal appraisal based on the opinions and subjective bias of appraisers, personal preferences, inaccurate ratings and leniency in assessments are common sources of contention. Within the SME context, the relationship between the appraiser and the appraisee could influence the personal appraisal process and outcome. It is, therefore, expected that through gaining an insight into the dynamics of the personal appraisal and learning about how parties interact with each other, there is potential to make a personal appraisal a more motivating and satisfying experience.

In this research, we explored factors influencing perceptions of fairness of a PAS in a SME with the view to understanding how the relationship between the appraiser and the appraisee affects perceptions of fairness in the organisation. The results indicate that respondents infer the fairness of PAS from certain aspects of procedural and informational fairness. Our findings, however, suggest that solutions employed to warrant procedural fairness could lead to different problems, such as worker indifference to PAS. Solutions to mitigate these side effects are discussed.

**Fairness at work**

Organisational justice concerns the extent to which employees consider they are treated fairly within the workplace (Linna et al., 2012) and consists of distributive, procedural and interactional justice. This article refers to the two latter forms.

Procedural justice relates to the fairness of the process used in making decisions (Heslin & VandeWalle, 2011). Research suggests that when employees feel their managers conduct personal appraisals fairly, they exhibit greater levels of trust in their employers. This is not always easy as employees often seek both consistency and flexibility from managers. Since SME have informal work environments, one can see how managing unplanned events may descend into inconsistency in outcomes and preferential treatment between employees by managers, leading employees to perceive a degree of unfairness in the way systems are operated.

Interactional justice is studied in two forms: interpersonal, and informational, fairness (Colquitt & Rodell, 2011). Interpersonal justice describes the extent to which procedures are executed with respect and propriety, whereas informational justice centres on the adequacy of explanations and truthfulness (Colquitt, Rodell, Long & Halvorsen-Ganepola, 2015). Interpersonal and informational justice may occur in various everyday manager-employee interactions which
could distinguish these forms of justice from others, especially within the SME context. For instance, appraisees can clearly feel that their treatment through these justice dimensions might be less favourable if the relationship with their manager is poor. This highlights the significance of the employee-employer relationship for perceptions of interactional justice and may be particularly pertinent to SME contexts where managers and employees are expected to have closer relationships.

Research design
This study investigated factors that influence perceptions of fairness and satisfaction of administrative staff of the PAS in operation within a small private training organisation. To examine the appraisees’ views on the fairness of the appraisal system used in the organisation, a qualitative approach was employed. This involved the use of a self-completion questionnaire consisting of 17 questions taking approximately 40 minutes to complete. The questionnaire was sent to all eligible 29 participants with 20 responses received. The data gathered from the qualitative survey was evaluated through thematic analysis.

Findings
This research suggests that certain aspects of procedural and informational justice forms employees’ perception of PAS. The respondents indicated that they welcome feedback if the system is enacted procedurally to generate fair results for discussion and communicated in a truthful and constructive manner to improve individual work performance. This is determined in several ways, including appraisal frequency, voice, evidence-based evaluations, clarity of purpose of the system, and its link to corporate objectives and ethicality. These procedural factors propose that more frequent and focussed discussions will enhance the credibility of appraisals to provide outcomes which are to the mutual satisfaction of both the organisation and its employees. Honesty in communication and the specificity and adequacy of explanations were valued informational fairness factors. If the information being reviewed is an accurate and objective representation of an individual’s work performance then it seems logical that any resulting two-way dialogue will be more satisfactory and perceived as fair - even if its outcome is unfavourable.

The above determinants of fair practice for appraisees seem eminently achievable within a small firm. However, this presents a potential practical dilemma for SME: given that procedural aspects are mainly cited as determinants of a fair PAS, how might this standardisation of process affect the quality of the appraiser-appraisee relationship?

This study revealed that many respondents considered the current PAS as a formality, with limited value to the organisation or the employee. In fact, many reported that the standardisation of the personal appraisal process rendered it a tick-box exercise. Where employees sense managers are ‘going through the motions’, it is noted and devalues the experience for the appraisee. This indifference may imply to the appraisee a lack of respect, care or appreciation, which may hinder the perceived honesty of communication and diminish trust between parties.

Our study participants described how the relationship with their appraiser was central to the level of satisfaction they had in the PAS and its perceived fairness. Workers generally preferred a PAS that minimises the role of subjective feelings, as indicated in the following quote from one of the respondents:

“I think the better an appraisal system is structured, the less opportunity there is for relationships to get in the way of a fair and constructive appraisal.”

Nevertheless, all the employees who participated in our study recognised that activities such as PAS should not derail working relationships. Respondents indicated that, on occasions, a personal relationship between appraisee and appraiser inhibited the delivery of accurate and objective feedback, which meant that the personal appraisal was experienced as less satisfactory. A quarter of respondents recognised that they also have a role to play in making the PAS as fair and successful as possible. This included refraining from raising comments which might negatively affect the relationship with their supervisors. For instance, one employee commented:
“It’s hard to be completely open because the parties involved don’t always agree and, in most cases, they don’t want to get into arguments or protract the discussion further.”

Others stated that they would like more involvement in determining key performance objectives set within the personal appraisal. This would allow employees to participate in the design of the targets, which are to the mutual satisfaction of the appraisee and the business and may demonstrate that their input is valued.

Respondents also reported, in their personal appraisal discussions, questioning the evaluations made by their manager in order that they understood the manager’s opinion. In cases where appraisees felt the assessment was inconsistent with their view, they offered counter examples to illustrate their point. This technique may compel appraisers to provide more detailed explanations of their decisions to these particular employees and, in the case of less favourable feedback, potentially diffuse any injustice felt on the part of the appraisee. This emphasises the role that both appraisers and appraisees have in promoting just treatment between each other. Accordingly, where appraisers are felt to act with integrity in their interactions with appraisees by offering constructive and supportive feedback and accepting different points of view without feeling antagonised, they are able to positively influence perceptions of fairness and levels of satisfaction with the PAS. Given the frequency of potential manager-employee interactions, it may be that fostering just treatment is beneficial to appraisers within other work contexts.

**Conclusion**

Understanding the influence of the PAS is imperative for organisations of all sizes since personal appraisals can have a significant effect on employees. The relationships between staff members in SMEs are often less formal and more flexible, therefore creating and maintaining a PAS which is perceived to be fair, without compromising close working relationships, can be challenging. Justice conveys to employees that they are valued members of their group and may further promote trust within different groups in the organisation. This can be significant in the SME context where work groups are smaller and, therefore, sensitivities towards respect and value within the community are more acute.

Procedural justice is an important issue in PAS which is often addressed by introducing a standardised process and inviting input from employees. However, cynicism and a perceived superficiality of the personal appraisal process can obstruct the potential benefits for future work performance. There is a danger that if the activity is not believed to add value for all stakeholders, then the perception of superficiality may engrain in the organisation. Our research suggests that SME should be vigilant in how this standardisation of PAS could influence the effectiveness of this process. In particular, the findings suggest that standard personal appraisal forms should not replace targeted and regular discussions regarding employees’ work performance. Where personal appraisal discussions involve evidence-based, two-way dialogue linked to the overall corporate vision, it is expected that personal appraisals leverage employee willingness to engage and enhance their performance. It also strengthens interpersonal relationships between managers and their staff.

An important note for SME is that employees may take a more active role in shaping fair interactions with their managers than anticipated. This might be specific to smaller work communities where the preservation of working relationships is paramount in the longer term. The findings of this research suggest that the quality of the interaction between appraiser and appraisee is a significant factor in influencing perceptions of fairness within the PAS and facilitating a more satisfactory experience for appraisees within smaller firms. Employees within a SME may have a vested interest in the success of the organisation for personal benefit (for example, job security) but also, perhaps, because of a sense of camaraderie with colleagues (including their appraisers). Therefore, we advise leaders of SME to consult and involve employees in the design of HR practices, such as the PAS, to understand what creates a sense of fairness for their employees. From this, a bespoke solution can be tailored to meet their specific needs and also help to avoid
debasing the PAS to an excessively formalised and standardised procedure with no added value to either the organisation or the employees.

References


Biography
Ciar McKenna-Charley graduated from the University of Portsmouth in July 2016 with a Masters in HRM.
Email: ciarcharley@aol.com

Dr. Hamid Foroughi is a lecturer in Organisation Studies at Portsmouth Business School. His research interest includes professionalisation, performance management and management control in SME and NGOs.
Email: hamid.foroughi@port.ac.uk
n practice, one of the most difficult areas to advise upon is ill-health dismissals where the employee is, or becomes, disabled. These are hard decisions with a personal element usually involving an employee who was a good performer but who now, through no fault of their own, finds themselves at risk of dismissal.

This article is intended to lay out, from an HR perspective, a legal overview of this area of employment law, highlighting some of the pitfalls which are to be found when navigating ill-health or capability dismissals of disabled employees.

We cover the principles in BS v Dundee City Council [2013] CSIH 91 and McAdie v RBS [2007] EWCA Civ 806 and then go on to look at how these principles are affected by the Equality Act 2010 (EqA) and the question of knowledge in Gallop v Newport City Council [2013] EWCA Civ 1583.

Finally, we consider the relevance of the duty to make reasonable adjustments under S 20 EqA 2010 and discrimination arising from their disability, S EqA 2010 considered, in Monmouthshire County Council v Harris UKEAT/0010/15.

In BS v Dundee City Council, the employee was dismissed for ill-health absences. He had been absent for around 12 months at the time he was dismissed. Before dismissing him, his employer obtained a report from an occupational health physician. The report indicated that he was making progress and would be fit to return to work, on a phased basis, within one to three months. Despite this assessment, the employer concluded there was no reasonable prospect of him returning to work in the short term and dismissed him.

The central question in any long term absence case is whether a reasonable employer would have waited longer before dismissing and, if so, how much longer? The guidance from this case informs us that an employer should consult the employee and ask for his/her views. Consultation should take place in tandem with proper medical advice being sought, directed at the likely prognosis. It is about asking, and getting, answers to the right questions, both from the expert and the employee. However, the decision is ultimately one for the employer to make.

Factors which were weighed in the balance in this case included the fact that cover was available, the employee’s salary was no longer being paid and the size of the employer weighed against the unsatisfactory position of having an employee on lengthy sick leave. One factor was held to be crucial: that the employee had a pessimistic view of when he was likely return to work, despite the medical report stating the employee was improving.

The question of length of service also arose. Whilst it was acknowledged that it plays an important part in misconduct cases, the impact on capability is more nuanced as long service on its own is not enough. It is, in fact, more about the kind of service the employee provided prior to his absence. A willing worker with a good attendance record in the past who is doing his utmost to return will be a factor which weighs in favour of waiting a bit longer.

In some cases, the ill-health of the employee is either wholly, or in part, blamed on the employer. It was this point that was addressed by the Court of Appeal (CA) in McAdie v RBS. Here a bank worker laid the blame for her mental ill-health squarely at the door of her employer. The Employment Tribunal found as a matter of fact that the employer was at least in part to blame for her continuing ill-health and inability to return to work. The employee made it clear to the Bank that she could never return to work and was eventually dismissed for capability. The Employment Tribunal found her dismissal to be unfair.
On appeal, the question arose as to whether a fair dismissal was in fact possible where the employer was the reason for the employee’s ill-health? The Court of Appeal concluded that the Bank’s culpability in bringing about the employee’s incapability was, without more, not a proper basis to find a dismissal was unfair. The Court of Appeal commented that in cases where the mishandling of the situation had led to the illness, the Tribunal will no doubt scrutinise the decision more closely to see whether the employer had in fact done all it could to avoid dismissal.

The Court of Appeal also endorsed the judgment of the Employment Appeal Tribunal, which made the clear distinction between actions which give rise to personal injury litigation and the right not to be unfairly dismissed. Focussing only on why an employer found itself in such a situation in the first place did not address the key question of whether a reasonable employer would have waited longer before dismissing and, if so, how much longer (see BS v Dundee City Council).

It is common practice for employers to ask occupational health advisers if the employee is disabled under the EqA. Employers are not under a duty to make reasonable adjustments if they do not know, or could not reasonably be expected to know, that an employee is disabled. So can an employer slavishly follow an occupational health doctor’s opinion? This was addressed by the Court of Appeal in Gallop v Newport City Council. The Council had written to occupational health advisers to simply ask whether they thought that Mr Gallop was disabled under the Disability Discrimination Act 1995 (now covered by the EqA). An occupational health doctor replied that the provisions of the Act did not apply to Mr Gallop. Later, a different occupational health doctor repeated that opinion. The Council argued successfully to begin with that it did not know that the employee was disabled. In the end the matter came before the Court of Appeal.

The Court of Appeal observed that employers “must not forget that it is still he, the employer, who has to make the factual judgment as to whether the employee is, or is not, disabled: he cannot simply rubber stamp the adviser’s opinion that he is not”. The Council had not done this and had been wrong to rely on the occupational health doctors’ opinions. The Court of Appeal made it clear that, provided the employer has actual or constructive knowledge of the facts constituting the employee’s disability, they do not need to know that, as a matter of law, the consequence of such facts is that the employee falls within the definition of a disabled person. In short, if the employer asks a generalised question about disability that is unlikely to be enough. The employer should make specific enquires about the relevant matters that are considered when a Tribunal looks at the issue of disability:

- What is the impairment?
- Is it long-term (has it lasted, or is likely to last, more than 12 months)?
- Does it have a substantial effect on the employee’s day-to-day activities?

In Monmouthshire County Council v Harris, the parties agreed that the employee was disabled within the meaning of the EqA, so the issue of knowledge did not arise. She went off sick and was subsequently dismissed after a period of absence. The medical advice indicated an uncertain prognosis in relation to attendance going forwards.

Key findings made at the hearing were that the absences arose from her disability but at the date she was dismissed there were no adjustments that would have enabled her to return to work, although there had been an earlier failure to make reasonable adjustments which may have prevented a return to work in the past.

The Tribunal found the dismissal to be discriminatory under S 15 EqA and unfair. However, the Tribunal ruled that a separate claim in respect of the earlier failure to make reasonable adjustments was out of time and dismissed this part of the claim.

The decision was appealed and came before HHJ Eady, QC. After she had reviewed BS v Dundee City Council and McAdie v RBS and their application to non-disabled employees she made the following points:

- Where there are no reasonable adjustments
which would enable a disabled employee to return to work then an earlier failure to make adjustments is not determinative of the question of whether a dismissal was fair or unfair.

- If an employee’s incapacity arises from a disability for the purposes of the EqA, this does not mean that a dismissal for a reason related to this must be unfair, provided that any required defence for justification under the EqA is made out.

- The role of the Employment Tribunal in assessing proportionality is not the same as its role when considering unfair dismissal. It is not confined to asking whether the decision was within the range of views reasonable in the particular circumstances. It is about an objective balance between the discriminatory effect of the condition on the employee and the reasonable needs of the employer.

- The exercise is one to be performed by the Tribunal reaching its own judgment upon a fair and detailed analysis of the working practices and business considerations involved. In particular, it must have regard to the business needs of the employer.

HHJ Eady, QC, then turned to the particular facts of the case. There were no adjustments that could be made at the date of her dismissal and the updated medical evidence continued to provide an uncertain and pessimistic prognosis in terms of the employee’s ability to return to work.

In those circumstances the decision of the Employment Tribunal could not stand:

- The employer could not have been expected to wait any longer (BS v Dundee).

- Despite its earlier failure to make adjustments, the employer could still fairly dismiss as there were no adjustments that could now be made (McAdie v RBS).

- The decision to dismiss whilst arising from her disability was proportionate because there was no certainty that the employee was likely to return to work in the foreseeable future.

Clearly the decision would have been different if there were adjustments that would have been effective in getting the employee back to work but once there were no further adjustments then a fair and justified discriminatory dismissal was almost inevitable.

**Key Points To Remember**

- When addressing ill-health issues, ensure you have up to date and accurate Occupational Health information.

- Ensure that you ask the right questions and do not simply rely on the standard Occupational Health referral form.

- Once you receive the Occupational Health report, ensure that the prognosis is clear. You may, after all, be deciding that an employee will be dismissed. Is it clear that the employee will not return to work within a reasonable time frame, or is unable to provide regular and reliable service in the future?

- If the employee is disabled, have you taken all reasonable steps in relation to adjustments, including discussions with the employee and the manager concerned, as well as seeking advice from Occupational Health and other sources, such as access to work or the relevant charity/support group?

- If you decide to dismiss, can you articulate the reasons why dismissal is appropriate? Examples of relevant factors are: prognosis; impact on other employees; who is covering the work/continuity?; need for a specific skilled individual.

- Lastly always keep a clear note throughout.

**Biography**

**Peter Doughty** is head of the Employment Team at 12 College Place, Southampton, and a member of the Employment Law Bar Association and the Employment Lawyers Association. He has more than 25 years experience in employment law, is a qualified mediator and delivers training to lawyers, HR professionals and managers. He is an expert in disability and discrimination law.
This 2016 research was located in a multi-campus FE college in the south-west of the UK serving c.16,000 students and employing a staff of more than 800, predominantly offering post-16 academic and vocational training. The college operates in a competitive market, with other colleges, private providers, local authorities and third sector providers vying for learners.

The senior management team is dedicated to the quality provision of teaching and learning, as well as embracing competitive challenges and the need to operate more commercially. Austerity measures, funding cuts and policy change have increased competition, and professionals in the sector are critical of this: “The policy of increasing competition and [student] choice is madness, and the promotion of competition precludes collaboration” (Smith, cited in Tickle, 2014).

Cavalli (2013) argues that “it is not enough for senior management to embrace an entrepreneurial mind-set, they must build a commercially aware culture”.

According to the college’s Director of Resources: “Academics now have to manage large curriculum areas, understand competition, provide commercially viable programmes of learning and recognise the economic requirements of the local geographic area, along with national and international demands for skills and knowledge.”

Within the HE sector, universities have been moving towards a market-led approach, creating tensions between promoting academic standards and the commercial imperative. The Evaluation of ‘New Challenges, New Chances’ FE Reform Plan (DeptBiS, 2013) concludes that competition, commercial awareness, entrepreneurialism and creative thinking are informing strategic planning, resulting in greater market responsiveness. This paper examines the importance of Commercial Awareness and Entrepreneurialism (CA&E).

FE is an area in which Organisational Ambidexterity (OA) is a necessity. OA is the ability to be aligned and efficient in the management of today’s business demands while being adaptive to changes in the environment and includes a strategic management focus, and organisational design and innovation strategies. There remain emerging competency traps where public sector organisations can apply outmoded skills to competency challenges. This study investigated how commercial and entrepreneurial understanding was perceived by FE academic managers and how it could be developed in the context of the disparate nature of academia and commercialism and entrepreneurialism. The three research questions were:

- What is the level of understanding of commercial awareness and entrepreneurialism?
- To what extent is this understanding considered important for sustainability?
- How can commercial awareness and entrepreneurialism competencies be developed?

The literature
Commercial awareness is defined as “the knowledge of how businesses make money, what customers want, and what problems there are in particular business areas” with entrepreneurialism, defined as “proactiveness, innovativeness, risk-taking, commitment building and the specifying of limitations” (Bagheri & Pihie, 2011). This qualitative research, based on 12 semi-structured interviews, explores how academic managers perceived CA&E in relation to their
middle management responsibilities and examines how these skills could be developed.

Beresford and Michels (2014, p.150) conclude: “...the range of middle manager roles has expanded...to encompass new market-orientated positions focused on income generation, enterprise and quality, alongside the more traditional roles of heads of departments, curriculum managers and cross-college managers with pedagogical responsibilities”.

The marketisation of FE is idealised in the UK and by seeking performance efficiency and embracing e-learning, the sector is aiming to satisfy an economic model of education. Deliberating the delicacies between academics who possess commercial prowess and those who have a traditional academic background, Birkinshaw and Raisch (2008) argue “...organisations have to reconcile internal tensions and conflicting demands in their task environments”.

C
ontemplating the need for an ambidextrous approach to academic management, Page (2014) explores the fortes of those academic lecturers with commercial backgrounds, examines the notion that competition brought into academic management is healthy, and that understanding the performance of the curriculum within the broader context of retention rates, as well as success and pass rates, allows for a union of managerialist and traditional academic approaches. Conversely, the increased importance of commercial viability in the movement from authority to market-based allocation threatens the academic integrity of courses and certainly traditional academic authority.

Meyer (2002) suggests that the US model will be followed by the European market and his observations regarding loss of academic integrity are increasingly echoed by others investigating challenges in education. It is important to consider the intricacies of the effect commercialism is having on teaching and learning. One outcome is that teaching and learning are becoming decontextualized, simplistic and mechanistic, void of human relations, focused on competition and securing profit margins, and the means to prepare for a future. Page (2014) implies that lecturers and managers in the FE sector, who migrate from owning companies or being self-employed are more aware of the business nature of education. Meyer (2002) asserts the need to be more business-like and that individuals with a commercial background bring greater drivers for efficiencies and proactive entrepreneurialism. However, entrepreneurialism and business praxes are not necessarily accepted and tensions remain between teaching and learning and financial obligations.

Middle manager interactions are significant for cultural change, particularly in relation to entrepreneurship. Cross-functional working supports entrepreneurship and more attention should be placed on developing and resourcing middle managers. Increasingly, academic managers with business and commerce backgrounds are being recruited and colleges are being managed by “managerialist values” (Briggs, 2004). However, there is a need for role clarity and support with due regard to the emotionality of holding a dual role as an academic and a manager, as academics often struggle with this. Tensions are emerging around performativity and efficiency and middle managers hold a crucial role, being at the interface between the academic community and the senior management. Goals in HE and FE are associated with lifelong learning, excellence and equity, academic achievement, pedagogical relationships and student care. However, the goals may be changing and aligning more with competition, financial and sales targets, customer satisfaction and market accountability as institutions try to maintain a corporate relationship with the community whilst retaining concern with the individual learner.

Findings

Middle managers have varying levels of understanding of CA&E but all participants considered it crucial for organisational sustainability. It was widely acknowledged that these competencies should be developed in order to meet the challenges of the sector and to meet organisational objectives. Whilst commercial awareness was considered essential, entrepreneurialism was viewed less so.
Respondents with commercial backgrounds demonstrated augmented CA&E skills and knowledge when compared to their career academic peers, and were passionate about the importance of CA&E proficiencies for the effective performance of their roles. Academic managers that originated solely from pedagogy struggled more with commercial imperatives relating to the new professional requirements and expressed less confidence in the dexterities expected for the changing academic manager role with a remaining emphasis on traditional academic approach, not necessarily compatible with the new, commercial dimensions.

However, the need for change was generally recognised and there was some enthusiasm for developing the CA&E competences. Bureaucratic processes, a residual focus on the market for full-time, fully funded learners and slow acceptance of change are inherent in the culture and, in comparison to that of private education and training organisations, this influences the ideologies and limit the aspirations and expectations of academic managers. A passion for teaching and learning and for the primacy of the learners’ needs are at the forefront of managers’ endeavours. Nevertheless, it was clear that business-related obligations, and the need to think creatively about the future of the college as a commercial enterprise, engenders intrapersonal and interpersonal conflicts in how time, resources and activities are prioritised in undertaking academic responsibilities.

The need for CA&E development in themselves and their peers was recognised but with a pressing need for all stakeholders to appreciate the tensions associated with this dualistic role. In summary, the potentially conflicting priorities and limitations were:

- the lack of time to be commercially aware and entrepreneurial
- the current culture of the organisation and gradual pace of change
- the perceived competing needs of the learners versus the business needs
- cost versus quality conundrums
- the fast changing curriculum and the effort expended in continuous change
- a lack of professional development opportunities in CA&E
- interpreting and enacting dualistic management roles

Whilst recognising that efficiency and commercial viability are the goal and entrepreneurial strategies, potentially, are the answer to competing in a dynamic environment, competing priorities, dualistic roles and complexities around managing time potentially impede the smooth delivery of education. Academic managers need the investment of time and energy into developing their CA&E skills. The commercial and scholarly cultures need to integrate to support a curriculum offer that is fit for purpose and that meets the needs of stakeholders.

Because individuals have different backgrounds, skills and experiences, no single model of developing CA&E competencies is appropriate and, therefore, a range of development opportunities is needed. There are convolutions and common frustrations related to being commercially aware and entrepreneurial in a traditional, pedagogical organisation. These inhibit the practice and development of both these skill sets.

In appreciating the diverse requirements of academic managers to enact their roles and the tensions that exist around their dualistic positions, CA&E has to be supported through strategic leadership and complementary HR practices. A better understanding of the knowledge and levels of experience, through undertaking skills audits, is essential to exploit CA&E development. In order to magnify the significance, self-initiated individual continuous professional development (CPD) programmes are recommended.

However, a potential organisational weakness is that the constraints of the sector and the culture of FE means that having entrepreneurial skills is considered by some to be a luxury that time just cannot afford with current pressures. Therein lies a significant tension. Whilst CA&E is being seen as intrinsic to the role of academic managers,
significant time, and rewards, need to be set aside for competence development. Organisational values also need to be embedded around CA&E in order to raise its importance.

In conclusion, senior management expectations are increasing and academics with traditional pedagogy skills are required to be more commercially aware and bring entrepreneurial attributes and business acumen to their roles, ensuring organisational sustainability.

Business-like practices are perceived by some to potentially hamper the primary goal of meeting the needs of the learners, despite it being understood that CA&E is imperative for the future. Academic managers are challenged by the ambiguities and contradictions of an education sector that is increasingly commercial and they face dualistic complexities in performing their roles. There is some lack of clarity in how to integrate these dexterities, but there is a general acceptance of the requirement for the development of CA&E competencies. The research now needs to be developed to include:

- Mapping the specific competences related to commercial awareness and entrepreneurial behaviours.
- Specifying the identified competencies and behaviours within job descriptors, person specifications and accountability profiles.
- Using these job descriptions and accountability profiles for talent planning, recruitment and selection, learning interventions, rewards linked to CPD and performance management.

Finally, further research is necessary to explore the contemporary role of the academic as a ‘pracademic’ able to blend scholarly activity and business-focussed activity in teaching, research and management in contemporary further and higher education environments where the education consumer is, increasingly, sovereign, and pays the bills.

References


Biography
Kathy McCormack is the Marketing Manager at a UK FE College. She has recently completed a Master’s in Leadership and Management at the University of Portsmouth. This article is based on her Master’s research.

Stephen Pilbeam has more than 25 years of experience as Principal Lecturer in HRM and Organisational Studies at the University of Portsmouth Business School. His research interests are focused on leadership and management in the armed forces business space.
Change is a given for organisations of all sizes and types. Change agents, acting as catalysts of change through language, agency and relationships, are crucial for any large-scale organisational change process (Westover, 2010; Wolf, 2011).

In the health and social care sector changes in life expectancy, patterns of disease, disability and health outcomes, public and patient expectations and medical advances make transformational change an imperative (Ham, Dixon, & Brooke, 2012). This article focuses on developing change agents in the NHS. It offers critical insights from an innovative approach to equipping, developing and supporting emerging change leaders in health and care organisations through a Massive Open Online Course (MOOC) which sets out to encourage individuals to adopt new attitudes to change and provide confidence to lead radical change in their organisations. The aim was to develop effective change leaders that can contribute to fast, large-scale, sustainable improvement in health and care, and therefore better patient outcomes.

The School for Health and Care Radicals
The School for Health and Care Radicals (SHCR) was established in 2014 by Horizons NHS Improvement and Quality (now NHS England) and continues on an annual basis to this day. Unlike traditional schools the learning media used was a MOOC-based programme providing free access to five, weekly, on-line modules supported by a range of social-media platforms through Facebook, Google, Twitter and live-chat. Theories of social learning and connectivism inspired programme designers and sponsors to establish this radical departure from traditional learning and training methods.

First, social learning theory suggests that technology-enabled learning can provide important opportunities for change agency through social modelling, social interaction and knowledge sharing, uninhibited by hierarchy and traditional linear and managed approaches to training (Bandura 2004; Siemens, 2005).

Whilst traditional methods and approaches to learning and development that have been instrumental in the industrial era are well-trodden, the programme designers were doubtful that these methods would prepare a new generation of professional leaders for meaningful action and change. The potential of social learning to secure behavioural, attitudinal and cognitive change at the individual and organisational level was attractive to Horizons NHS. The aim was to recast the logic on how change takes place in organisations by designing new concepts and change ideas. Drawing on work about communities of practice (Lave & Wenger, 1991), the MOOC-based programme that was developed set out to socialise new learners into the School as they begin to operationalize their learning in the language, mental change models and behaviours they choose to use.

Second, insights from social learning (Bandura, 1991; 2004) led to the encouragement of changes to practice based on observation so the School introduced new concepts such as collaboration, storytelling and experimentation. Observation, cognitive processes and self-regulative influences highlighted in Bandura’s work were reflected in the importance placed in the MOOC design on information sharing, storytelling and community. Bandura’s focus on the power of agency became a key feature of the SHCR and individuals, within their work context, were encouraged to reflect on change theories and concepts, and choose which works best for them. For example, participants were encouraged to identify their role as a positive disrupter, trouble-maker and/or rebel leading them to build their sense of...
awareness and efficacy around what these concepts mean to them.

In addition, the School used concepts that appeal to emotion to ignite new passion, energy and drive for change, and encouraged participants to use a process of self-reflection to identify and mediate the potentially negative effects of their learning. The SHCR set out to move social learning theory on from observation to experimentation and students of the School were encouraged through the social networking infrastructure of the programme to discuss, in a safe environment, with peers what they had learned and to embed it into their practice.

In course design and implementation, therefore, the SHCR programme emphasised social connectivity, relational ways of knowing and being adaptable. Julian Stodd (2014), an advocate for social learning, argues that “connectivism” provides the opportunity to connect on common, shared purpose through the exploitation of social spaces where purpose can be combined with key activities that enable change. In this way expertise is distributed along the network rather than located in the few individuals at the top of the hierarchy.

The MOOC platform of the SHCR increased the visibility and value of social collaboration with the intent that communication and learning would become democratised and hierarchical infrastructures would no longer control the distribution of knowledge and power to change. The School emphasised the need for both horizontal and vertical leaders to encourage shared leadership and to overcome the traditional leader/follower divide (Harris, 2013).

To encourage connectivism as a basis for access to resources, change models and practices, SHCR learners are encouraged to participate in on-line and off-line communities and act as boundary spanners, to work at the edge of networks connecting health and care professionals from a wide variety of backgrounds. Diversity of perspectives and experiences (Engestrom, 2001) are used to solve new problems in everyday working practices and find new solutions to old problems.

A third feature of programme design is storytelling which is used as a catalyst for action. Stories provide a rich communication medium because they conjure up complex images and they can appeal to both hearts and minds. Storytelling is a common way to communicate ideas and build relationships with weak ties – people who are not part of your direct network but who you have the potential to reach (Granovetter, 1973). By the telling and re-telling of stories, a space for sharing commonality and difference emerge that provide a basis for dialogue and a stimulus for organisational development. A defining principle of the SHCR is to encourage dialogue on level playing fields between health professionals, patients, clinical and corporate functions so that diverse perspectives on change can emerge that were previously hindered.

Within the SHCR programme, opportunities to engage in new change conversations and the use of stories to support this provided an important process to convert tacit knowledge into explicit knowledge as an embedded part of the organisation’s ‘knowledge network’ (Eraut 2000; Vygotsky 1962; Lave & Wenger 1991; Herschel, Nemati & Steiger, 2001).

In summary, the SHCR fully exploits social media to expand the extent to which once-passive individuals are able to engage with people across the health and care sector hierarchy and system. Social learning through technology means that individuals have the ability to connect in ways that were not physically possible. Social platforms provide a space for in-depth social interaction, community formation, and the tackling of collaborative projects (Bruns & Bahnisch 2009). Learners gain access to diverse on-line opinions, and use the space to ‘talk back’ to sites of power (Bruns, 2005), and to stimulate their micro-activism in organisations.

Implementation and Evaluation

Embarking on a radical departure in change agency development in a large organisation such as the NHS is not for the faint-hearted and we now evaluate the steps we took to ensure that ‘lessons learned’ from the implementation of the school
have been incorporated into the ongoing development of the programme.

The SCHR in MOOC form was launched in 2014 and an external organisation, the Chartered Institute of Personnel and Development (CIPD), was commissioned to evaluate the programme in 2015. First, the perceived aims and impact of the 2014 SHCR programme was undertaken through interviews with key people involved (designers, facilitators, and programme participants). From this an initial theory of change or impact model was developed that formed the basis for a mixed-methods evaluation of the 2015 SHCR programme using a pre- and post-programme survey, participant interviews and social media data.

The CIPD evaluation report (CIPD, 2016) confirmed that the SHCR provides a positive learning experience. Participant numbers exceed what could be achieved in any other learning format. At the commencement of the 2015 programme, for example, 1,232 participants had registered; 24,551 views of school materials were logged and Twitter data recorded that ‘#SHCR’ achieved 20,786,339 impressions across 14,288 tweets; ‘@School4Radicals’ reached 35,044 unique Twitter accounts and had 1,686 followers. Over the duration of the 2015 programme 426 participants (35% of registrations in January 2015) joined the SHCR Facebook group.

The CIPD evaluation shows that participants are likely to leave the programme with emotional energy, passion and drive to make a difference, and build their confidence to be resilient. Change agents who attend the School develop the tools and approaches to change not found in the modern leadership training programmes. The modules taught in the School enable individuals to build support for change at work, to use storytelling to inspire change and to make a positive impact without waiting for permission.

Implications for HR practice
The evaluation provides insights with relevance to HR practice beyond the health and care sector. First, the evaluation data show that prior experience and levels of confidence with learning and social media technology does not have any important effect on the programme impact. Second, although knowledge of change is enhanced through programmatic learning, social learning impacts on participants’ change agency and their propensity to act to initiate and achieve organisational change outcomes; social learning is a necessary pre-requisite of change-orientated collaboration and change agency. Third, generating social interactivity through a dispersed network of peers using technology has an important impact on building support for the possibility of change. Specifically, in a context of systemic institutional perceptions of helplessness, social learning generates access to the encouragement and support of others. Through storytelling and knowledge sharing processes, social learning provides a basis from which participants can become inspired and motivated to consider change as an option for themselves and for their organisation at a local level. Social learning outcomes can be considered as a pre-requisite to propensity to act in a change-agent capacity.

As HR professionals, if we are to encourage socially dynamic organisations, we must enter into this space of defining what it is and the value it holds for emerging leaders from different perspectives and backgrounds. The NHS SHCR programme provides important signals of what this could look like in the future. Organisations are now beginning to exploit the potential of social learning to engage staff in change conversations. A range of human resource benefits can emerge by giving staff the freedom to share their ideas in a socially responsible way.

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