



## NLS Contract Renewal

*A proposed statement of work from Nurse Leadership Strategies (NLS) outlining leadership and team development activities for 7/1/20-6/30/21*

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## Overview

This document contains a revised Statement of Work for executive coaching and leadership development services provided to Arrowhead Regional Medical Center by Nourse Leadership Strategies. The original Statement of Work is revised to reflect project scoping changes as a result of the COVID-19 pandemic. This SOW reflects an estimate of the level of effort required to meet ARMC goals for the period 7/1/20 through 6/30/21.

This Statement of Work consists of four major projects including:

- ▲ Team coaching and facilitation for senior leadership teams
- ▲ Executive coaching for individual administrators
- ▲ Delivery of the Management Development Program (MDP) for managers and supervisors
- ▲ Delivery of the Future Leaders Program (FLP) for high-potential managers

The table below summarizes the proposed hours required to restart the existing programs along with the expansion of the administrator team coaching program per the ARMC CEO.

Project	Hours Estimate for 7/1/20-6/30/21
1: Team coaching and facilitation	285
2: Executive coaching	120
3: Management Development Program (MDP) delivery	180
4: Future Leaders Program (FLP) delivery	78
Total hours	663
Cost (Based on \$375 per hour)	\$248,625

## Project 1: Team coaching and facilitation

Project 1 consists of activities associated with supporting the development and performance of the ARMC administrative teams. The total level of effort for project 1 is 285 hours.

Five teams will be participating in team coaching activities for the year 7/1/20-6/30/21 including:

- CEO leadership team (CEO and direct report administrators)
- Chief Operating Officer leadership team (COO and direct reports)
- Chief Financial Officer leadership team (CFO and direct reports)
- Chief Nursing Officer leadership team (CNO and direct reports)
- Compliance leadership team (Chief Compliance Officer and direct report managers)

In addition, quarterly teambuilding sessions will be conducted for the CEO and senior leadership team to build alignment and collaboration on key ARMC priorities.

Team coaching in 2019 focused on the CEO leadership team. Efforts on this project were canceled in March 2020 due to the pandemic.

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### Task 1: Team coaching for the CEO leadership team

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This task will consist of assessment, a team coaching kickoff, and on-going team coaching sessions approximately every six weeks:

- Conduct team assessment activities to determine the current state of team functioning (8 hours).
- Conduct a team coaching kickoff session to debrief assessment findings, clarify team development goals, and formulate a team vision (5 hours).
- Conduct 9 team coaching sessions of up to 4 hours each (36 hours).

The level of effort for task 1 is 49 hours.

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### Task 2: Team coaching for the COO leadership team

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This task will consist of assessment, a team coaching kickoff, and on-going team coaching sessions approximately every six weeks:

- Conduct team assessment activities to determine the current state of team functioning (8 hours).
- Conduct a team coaching kickoff session to debrief assessment findings, clarify team development goals, and formulate a team vision (5 hours).
- Conduct 9 team coaching sessions of up to 4 hours each (36 hours).

The level of effort for task 1 is 49 hours.

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### Task 3: Team coaching for the CFO leadership team

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This task will consist of assessment, a team coaching kickoff, and on-going team coaching sessions approximately every six weeks:

- Conduct team assessment activities to determine the current state of team functioning (8 hours).
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- Conduct a team coaching kickoff session to debrief assessment findings, clarify team development goals, and formulate a team vision (5 hours).
- Conduct 9 team coaching sessions of up to 4 hours each (36 hours).

The level of effort for task 1 is 49 hours.

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#### Task 4: Team coaching for the CNO leadership team

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This task will consist of assessment, a team coaching kickoff, and on-going team coaching sessions approximately every six weeks:

- Conduct team assessment activities to determine the current state of team functioning (8 hours).
- Conduct a team coaching kickoff session to debrief assessment findings, clarify team development goals, and formulate a team vision (5 hours).
- Conduct 9 team coaching sessions of up to 4 hours each (36 hours).

The level of effort for task 1 is 49 hours.

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#### Task 5: Team coaching for the Compliance leadership team

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This task will consist of assessment, a team coaching kickoff, and on-going team coaching sessions approximately every six weeks:

- Conduct team assessment activities to determine the current state of team functioning (8 hours).
- Conduct a team coaching kickoff session to debrief assessment findings, clarify team development goals, and formulate a team vision (5 hours).
- Conduct 9 team coaching sessions of up to 4 hours each (36 hours).

The level of effort for task 1 is 49 hours.

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#### Task 6: Quarterly teambuilding sessions for senior leadership teams

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This task will consist of 4 quarterly teambuilding sessions lasting 4 hours for the CEO and senior leadership team to explore and build alignment on strategic priorities.

- Gather input to determine the agenda and debrief with the CEO (16 hours).
- Prepare suitable materials and facilitate the teambuilding session (24 hours).

The level of effort for task 6 is 40 hours.

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## Project 2: Executive coaching

Project 2 consists of activities associated with developing the leadership capabilities of individual ARMC administrators through executive coaching and feedback. The total level of effort for project 2 is 120 hours.

We propose providing executive coaching for up to 6 executives identified by the ARMC CEO. Each coaching engagement will consist of the following activities:

- ▲ A kickoff session (2 hours)
- ▲ Assessment consisting of the use of psychometric instruments and 360-degree feedback collected from selected stakeholders (6 hours)
- ▲ Debrief assessment findings and support the creation of a development plan (2 hours).
- ▲ Facilitate an alignment between the coachee and his or her direct report supervisor (1 hour).
- ▲ Eight on-going coaching sessions, each lasting 1 hours and conducted in-person or virtually (conference call, Zoom video) (8 hours).
- ▲ A final debrief with the coachee and his or her direct report supervisor (1 hour).

The total level of effort for single coaching engagement is 20 hours and total for this project is 120 hours.

Four ARMC executives received coaching during the period 2019-2020.

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## Project 3: Management development program

Project 3 consists of activities associated with the implementation of a management development program (MDP) for managers and supervisors at ARMC along with a train-the-trainer effort to support the ARMC training specialist. The total level of effort for project 3 is 180 hours.

The basic program was developed in 2019 and contains 17 learning modules. Delivery of the program began in January 2020 but was subsequently canceled due to the pandemic.

There are two tracks associated with the resumed rollout of the program:

- ▲ Track 1: Managers and supervisors that participated in the initial kickoff in January (approximately 80)
- ▲ Track 2: Managers and supervisors hired or promoted since they initial kickoff in January (approximately 30)

The rollout schedule for the remaining modules will be based on these two separate tracks.

- ▲ Track 1: We will deliver the modules with the ARMC training specialist, Laura Reynolds, participating in the class. This track will begin with a custom-developed module that reviews key concepts from the 7 modules previously delivered in 2020.
- ▲ Track 2: Dr. Nourse will co-facilitate with Laura Reynolds as a train-the-trainer program, starting with the initial module MDP101 (Emotional Intelligence).

The learning modules will be delivered on-site using the Oak Room, which has a capacity of 40 participants with appropriate social distancing. We will delivery approximately 4 modules per month (2 modules for track 1, 2 modules for track 2) depending on the availability of trainers and conference room space.

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### Task 1: Program administration

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Task 1 involves coordinating with the ARMC training coordinator to schedule sessions, conduct status meetings, administer the EQI assessment, and track evaluation results. We assume 2 hours per month for this task for a total of 24 hours.

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### Task 2: Deliver modules for Track 1

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Task 2 will entail delivery of the MDP modules to managers who participated in the original kickoff in January 2020. NLS will provide trainers for each module and Laura Reynolds will participate as part of her train-the-trainer program.

The first session to resume delivery of the MDP will consist of a 2-hour review of the Leading Oneself modules. This will allow participants to reflect on their experience during the initial phase of the pandemic and explore concepts introduced in the kickoff program.

For the delivery of the modules, we assumed:

- ▲ 11 modules remaining in the series to be delivered
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- ▲ A maximum of 40 participants per class (due to social distancing)
- ▲ 80 total participants
- ▲ 2 offerings of each module with up to 40 participants in each
- ▲ 1 trainer per session
- ▲ 4 hours per module including 2 hours of delivery and 2 hour of preparation time.

Based on these assumptions, the total level of effort for the delivery of a module is 8 hours. The total level of effort for delivery of 11 modules is 88 hours.

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### Task 3: Deliver modules for Track 2

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Task 3 will entail delivery of the MDP modules to managers who were hired or promoted since the original kickoff in January 2020. Dr. Nourse will partner with Laura Reynolds to deliver each module as part of her train-the-trainer program. In developing the estimate for this track we assumed:

- ▲ 17 modules remaining in the series to be delivered
- ▲ A maximum of 40 participants per class (due to social distancing)
- ▲ 30 total participants
- ▲ 1 offering of each session with up to 40 participants in each
- ▲ 1 trainer per session
- ▲ 4 hours per module including 2 hours of delivery and 2 hour of preparation time.

Based on these assumptions, the total level of effort for the delivery of a module is 4 hours. The total level of effort for 17 modules is 68 hours.

## Project 4: Future Leaders Program

Project 4 consists of continuing the delivery of a pilot development program targeted at 7 high-potential staff at ARMC. The total level of effort for project 4 is 78 hours.

The Future Leaders Program (FLP) consists of several components including five one-day training sessions, 3 executive coaching sessions for each participant, a leadership project and mentor for each participant, and monthly check-in sessions facilitated by program participants.

The program was developed in 2019 and launched in January 2020. Subsequent training sessions were canceled because of the pandemic. We propose restarting the delivery of the program in September 2020 and concluding it in March 2021.

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### Task 1: Deliver training sessions for FLP participants

Task 1 involves the delivery of the remaining four sessions for FLP participants, each lasting 8 hours plus 2 hours of preparation. The total level of effort is 40 hours.

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### Task 2: Deliver executive coaching sessions for FLP participants

Task 2 involves providing 3 individual executive coaching sessions for each program participant. The total level of effort for this task is 14 hours.

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### Task 3: Evaluate the pilot program and update the design

Task 3 involves evaluating the initial pilot program and updating the materials to be launch in 2021. The total level of effort for this task is 24 hours.

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