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EXECUTIVE SUMMARY

In late 2014/early 2015, NHS Education for Scotland (NES) and Health Facilities Scotland (HFS) sought applications for funding from NHSScotland (NHSS) Boards for a ‘demonstrator’ project relating to the Estates and Facilities (E&F) Education Pathways.

The funding was originally designed to enable Boards to focus on the implementation of the Education Pathways and to examine the impact of this implementation, with a view to planning how to sustain their use in the future.

In due course, the focus of the demonstrator projects moved on to the impact of work-based learning and creating a learning culture for staff members. The Education Pathways were, however, the starting point for all of the projects, given that qualifications that staff members completed were identified using the Education Pathways.

The E&F demonstrator project involved 30 staff members in 6 Boards undertaking qualifications. The qualifications most staff worked towards were the SVQ2 in Facilities Services, the SVQ3 in Facilities Management, or an assessor’s award. In one Board, participants worked towards SVQ2 in Teambuilding, SVQ3 and SVQ4 in Management.

Summary profile of the participants

There was a broad range in participants’ length of service with NHS, with a significant proportion having long service. However, most participants had been in their current post for less than 10 years at the baseline point of the project.

Most participants were in AfC Pay Band 3 or above, but there was a significant number in Pay Band 1.

A significant proportion of the participants had line management experience, often for large numbers of staff.

Participants’ motivation for taking part

The most popular (**top three**) reasons participants gave for participating in the project were:

- to strengthen skills in my team
- to help in my current job
- manager asked/told me to

Impact from the perspective of participants

Participants identified a number of impacts on themselves and their work. We have identified the top two, where participants said they felt:

95.7% confident that they are working in the “right way”

95.7% encouraged to support others to make changes to the way they work

Additionally, participants said they now felt:

- able to question the ways things are done and to suggest improvements
- able to manage change in the workplace
- able to understand work systems

Impact from the perspective of managers

Line managers made reference to staff members:

- being more positive in their actions
- having better understanding of why they do a particular job
- having more confidence now.

Line managers identified increased confidence as the most important change in staff.

Impact from the perspective of senior managers

Senior managers said that as a result of the experience of staff members undertaking qualifications in this project, they planned for other staff to undertake qualifications in the future. They offered positive examples of impact as follows:

- increased awareness of the purpose of a role when being asked to undertake certain responsibilities and tasks, which led to the easier implementation of change
- the staff member has set an example to others that it can be done
- improved feedback from patients/visitors and staff.

Challenges identified

There were challenges for a number of participants finding time to complete qualifications, but this is in line with concerns for other work-based learning projects.

Overall impact

It would appear that participants and managers thought the qualification to be clear, appropriate, relevant and achievable by their staff members.

21 out of 23 participants

91.3% |

said that they would recommend the qualification to a colleague.

11 of 12 line managers

91.7% |

said that they would recommend the qualification to staff.

Boards provided information in final reports about plans to sustain the impact of their demonstrator project. This information contains examples of ways in which the project has led to the development of a learning culture within the Boards' E&F services, specifically around:

- staff members' increased interest in and enthusiasm for work-based learning
- the roll out of and planning for increased work-based learning opportunities within the service
- staff members' increased capacity to support colleagues to learn and develop, including by some becoming qualified assessors
- staff members' interest in and willingness to take on new responsibility and/or roles.

Overall conclusions

1. The qualifications had a positive impact on participants and their departments/services.
2. There is evidence of a shift towards a learning culture in the participating Boards, with increased interest among some participants for taking part in further learning, in supporting colleagues to do the same, and in taking on new roles and responsibilities.

“ Understanding work systems made me even less [*reliant*] on management ”

“ Gave me more confidence in dealing with other departments, supporting staff with problems involving working practices ”

“ Encouraged me to do more learning to help me be the best I can be in my job role and supporting of others. ”

“ I feel more confident to voice my opinion. ”

“ Gave me the confidence to support domestic assistants who are now completing their SVQ2 and I am now doing the assessors qualification. ”

From participants of the E&F Demonstrator Project

INTRODUCTION

Section 1

Background to the project

In late 2014/early 2015, NHS Education for Scotland (**NES**) and Health Facilities Scotland (**HFS**) sought applications for funding from NHSScotland (**NHSS**) Boards for a ‘demonstrator’ project relating to the Estates and Facilities (E&F) Education Pathways.

This funding was originally designed to enable Boards to focus on the implementation of the Education Pathways and to examine the impact of this implementation, with a view to planning how to sustain their use in the future.

In due course, the focus of the demonstrator projects moved on to the impact of work-based learning and creating a learning culture for staff members. The Education Pathways were, however, the starting point for all of the projects, given that qualifications that staff members completed were identified using the Education Pathways.

Relationship to the Estates and Facilities demonstrator project

A parallel project focused on demonstrating the impact of the Education Pathway for Business and Administration. A separate evaluation report describes that project and evaluates its impact. A joint executive summary draws out findings from both the Business and Administration and Estates and Facilities demonstrator projects.

Relationship to the Education Pathways Implementation Pilot

A pilot project to support implementation teams in 5 NHS Boards ran from June 2016 to September 2017. The pilot focused on providing support to address Boards’ learning needs in relation to the E&F Education Pathways, in order to drive their implementation. A separate evaluation report identified the impact of the pilot and the learning that came out of it.

This evaluation report complements the evaluation of the implementation pilot. It is more focused on the impact on staff members of work-based learning, while the implementation pilot report describes activity to embed the Education Pathways more strategically in Boards.

Participating Boards and staff members

The E&F demonstrator project involved 30 staff members in 6 Boards undertaking qualifications, as follows:

NHS Board	Qualification	Number of participants
NHS Borders	SVQ2 Facilities Services	7
	Assessor's qualification	3
NHS Forth Valley	SVQ3 Facilities Management	2
NHS Greater Glasgow and Clyde (GGC)	SVQ2 Teambuilding; SVQ3 and SVQ4 Management	5
NHS Lothian	SVQ3 Facilities Management	6
	Assessor's qualification	2
NHS Orkney	SVQ3 Facilities Management	2
NHS Shetland	SVQ3 Facilities Management	3 (of whom 2 completed)

How this project's activities promote and sustain the Education Pathways for Estates and Facilities

In their original applications to NES and HFS, the six Boards that were successful in receiving funding support explained how they would promote, implement and sustain the Education Pathways for Estates and Facilities by supporting staff members to undertake qualifications.

In the main, the Boards said that they were going to use the funding to encourage staff members to undertake work-based learning (with a key focus on the SVQ2 in Facilities Services and the SVQ3 in Facilities Management). They would do this with a view to then upskilling key members of staff in assessment skills and even internal verification skills. Indeed, some staff members would be trained in assessment as part of this project. Senior managers in five of the Boards made specific reference to ways that activity would help to implement and sustain the Education Pathways in their services:

NHS Shetland explained that they would be putting in a place a “self-sustaining model” where staff members who had previously gained the SVQ2 in Facilities Services would go on to take the SVQ3 in Facilities Management to support them in their new role, with some participants undertaking an assessor’s qualification at the same time. These assessors would be able then to assess colleagues taking SVQs in the future “in-house” — thus building an interest in ongoing career development and building capacity to support it within the Board.

NHS Orkney said that they wanted to provide opportunities for staff members to develop, with the hope that: these staff will, in turn, undertake the assessor qualification to assess future candidate’s onsite and allow the Estates and Facilities Team to continue to develop and move through the different levels of the education pathways, disseminating their knowledge and understanding of the pathways.

They said that this activity would support: the strategic direction set out in our Workforce Strategy and our Everyone Matters Implementation Action Plan. A key achievement from this project will be enabling NHS Orkney to have an identified education pathway and development programme for our facilities staff putting accredited learning and structured personal development plans in place, planning for our move to a new hospital.

NHS Greater Glasgow and Clyde wanted to use the project to support staff members to undertake the SVQ3 in Facilities Management: with a view to them subsequently training as assessors, with two or three going on to become internal verifiers — thus creating a “framework of accredited development for staff in Facilities.”

They said that creating work-based assessors would: enable linkages to be established between the SVQs and other internal learning and education which is currently in place for Facilities staff. This in turn will begin to facilitate the identification of an education pathway which will include accredited and non-accredited learning.

NHS Forth Valley saw the project as: an opportunity to introduce the education pathway to estates and facilities which would then be rolled out to other facilities departments ... By introducing SVQs to our estates and facilities service it will demonstrate to the board that the education pathway can be successfully implemented. and that: this Project would be the start of building capacity which would lead to long term sustainability of the education.

NHS Borders stated their belief that staff members would: greatly benefit from this qualification allowing them to see a career pathway and progression within their chosen field and being supported for future roles within the organisation to aid succession planning.

This evaluation

Most staff members who were working towards a qualification had completed it by the end of January 2018.

This evaluation measures impact at the end-point of delivery, and presents an analysis of data drawn from:

- baseline questionnaires that participants responded to following the induction meeting in 2015
- baseline questionnaires that participants' line managers responded to following the induction
- end-point questionnaires that participants responded to at the end of the project, following completion of their qualifications
- end-point questionnaires that line managers responded to at the end of the project
- end-point questionnaires that senior managers in the participating services completed at the end of the project.

Our approach to analysis

Our evaluation's findings are based on an analysis of quantitative and qualitative data in each of the above questionnaires.

It is important to note that not all questionnaires were returned, and not all returned questionnaires included answers to every single question. For example, 25 people might have responded to Question A, 24 to Question B and 26 to Question C. We have used percentage scores (rounded to one decimal place) alongside actual numbers in order to provide proportional representations of responses.

The questionnaires provide data relating to a range of qualification levels and qualification types. We have approached our analysis by treating the range of evaluative data as a whole, as this evaluation is not about the impact of individual qualifications on members of staff in different areas or jobs or grades. Instead it is about the impact on a number of staff members of work-based or work-related learning, inspired and supported by the Education Pathways.

Each Board used a 'planning for impact framework' to identify indicators of success that they could look for evidence against at each stage of the project, namely:

- Engagement
- Learning
- Application of learning
- Longer-term impact on the organisation/department

Each planning for impact framework is different, with a focus on local objectives; however, there are common themes and indicators identified across the six frameworks. We will refer to these local frameworks during our analysis of the data, and we describe when and how we will do this in Stages of our analysis below.

Stages of our analysis

We have used the participants as the starting point for our analysis. We provide the following descriptive analyses:

- a profile of the group of participants
- an analysis of the participants' motivations and aspirations based on their responses in their baseline questionnaires
- a reflection on the extent to which line managers' baseline responses mirror or clarify those of the participants
- an analysis of the participants' assessment of the value of their experience and its impact on them and their work
- a reflection on the extent to which line managers' and senior managers' responses mirror or clarify those of the participants

Structure of this report

We present this descriptive analysis in **Section 2: Measuring the impact of the Estates and Facilities Demonstrator Project**, below. We have also identified some additional impacts in this section.

We present our conclusions in **Section 3**

Finally, we offer a range of quotations taken from staff members' and managers' responses in **Section 4: Appendices**.

MEASURING THE IMPACT OF THE ESTATES AND FACILITIES DEMONSTRATOR PROJECT

Section 2

Profile of the participants

Participants provided data that allows us to build a profile of them. Data varies between questionnaires; for example, where participants completed a baseline questionnaire at the start of the project but not at the end. Therefore, we have chosen to present a profile of the participant group based on data from the baseline questionnaire. There were responses from 33 participants at this stage.

1. Participants' length of service with NHS

At the time of their response, participants told us that they had worked for the NHS for the following lengths of time:

Number of years	Responses
under 1	0
1 to 3	9
4 to 5	1
6 to 10	3
11 to 20	8
21 to 30	12
more than 30	0

Participants tended to have several years of service; for example, more than half of the participants (20 out of 33, or 60.6%) had completed more than 11 years' service in NHS². There were a significant number of participants (9 out of 33, 27.3%) who had between one and three years' service.

2. Participants' length of time in their current job

Participants had been in their current jobs for the following lengths of time:

Number of years	Responses
under 1	2
1 to 3	11
4 to 5	4
6 to 10	5
11 to 20	8
21 to 30	2
more than 30	0

² It is not possible to provide a mean average length of service as the optional ranges are of different sizes.

Most commonly, participants had been in their current job for between one and three years (11 out of 33, or 34.4%); however, a significant number (10 out of 33, or 31.3%) had been in their current job more than 11 years.

AfC Pay Band	Responses
1	7
2	0
3	13
4	6
5 or above	7

Participants were most likely to be in AfC Pay Band 3 (13 out of 33, or 39.4%). While there was a significant number in Pay Band 1³ (7 out of 33, or 21.2%), the majority of participants (26 out of 33, or 78.8%) were in Pay Band 3 or above.

4. Responsibility for line management

25 of the 33 participants (75.8%) who responded to the baseline questionnaire told us that they had responsibility for line managing other, often multiple, staff members.

5. Participants with previous qualifications

In the baseline questionnaire, 33 participants responded to the question, Do you have any qualifications? 25 (or 75.8%) said that they did have qualifications, and 8 (24.2%) said that they did not.

Summary profile of the participants

There was a broad range in participants' length of service with the NHS, with a significant proportion having long service. However, the majority of participants had been in their current post for less than 10 years at the baseline point of the project.

Most participants were in AfC Pay Band 3 or above, but there was a significant number in Pay Band 1⁴.

A significant proportion of the participants had line management experience, often for large numbers of staff.

³ At the time of this data collection.

⁴ At the time of this data collection.

We received baseline questionnaire responses from managers of 26 participating staff members across the 6 Boards. We received end-point questionnaire responses from managers of 13 participating staff members, with representation from managers in 5 of the 6 Boards.

We draw on these managers' views on the impact of the qualification on their staff member in our analysis below.

Participants' responses

(a) Participants' overall motivation for taking part

Participants identified their most important reason for participating from a list of options in the questionnaire:

Motivation	Number of Responses
to strengthen skills in my team	9
manager asked/told me to	9
to help in current job	6
don't want to change jobs but qualification might be useful in future	5
to help staff undertake qualifications	2
to gain confidence in my abilities	1
to support the learning of other staff	1
to help me find a new job	0
to show me I can still learn	0
own interest or enjoyment	0

In the end-point questionnaire, learners provided examples of ways in which they believed the qualification had helped them to achieve their goals. We have provided some of their statements in [Section 4: Appendices](#).

(b) Participants' views on the qualification

1. Understanding of the aims and structure

In the baseline questionnaire, 27 out of 33 (81.8%) participants agreed or strongly agreed that they understood the aims and structure of the qualification. 6 (18.2%) neither agreed nor disagreed.

2. Understanding of how the qualification fitted with their work

In the baseline questionnaire, 20 out of 27 responses (74.1%) agreed or strongly agreed that they understood how the qualification fitted with their work. 6 (22.2%) neither agreed nor disagreed, 1 (3.7%) did not know.

In the end-point questionnaire, 21 out of 23 (91.3%) participants agreed or strongly agreed that they could see how the qualification fitted with their work. This represents more than a 17 percentage point increase since the start of the project, which might be because of participants' increased familiarity with the qualification.

3. Understanding of what was needed to complete the first units

In the baseline questionnaire, 20 out of 27 responses (74.1%) agreed or strongly agreed that they understood what they needed to do in order to complete the first units in the qualification. 6 (22.2%) neither agreed nor disagreed, 1 (3.7%) disagreed.

4. Understanding of what was needed to complete the portfolio (only included in the questionnaire for those taking an assessor's qualification)

In the baseline questionnaire, 5 out of 6 responses (83.3%) agreed that they understood what they needed to do to complete the portfolio. 1 (16.7%) did not know.

5. Ability to find the evidence needed for the qualification from work

In the baseline questionnaire, 27 out of 29 participants (93.1%) agreed or strongly agreed that they would be able to find the evidence they needed for their qualification from their work. 2 (6.9%) neither agreed nor disagreed.

6. Ability to find the time to complete the qualification

In the baseline questionnaire, 19 out of 33 participants (57.6%) agreed or strongly agreed that they would be able to find the time to complete the qualification. 10 (30.3%) neither agreed nor disagreed; 1 (3.0%) disagreed; 1 (3.0%) strongly disagreed; 2 (6.1%) did not know.

In the end-point questionnaire, 13 out of 23 (56.5%) of participants agreed or strongly agreed that they had been able to find the time they needed to complete the qualification. This percentage on completion is in line with the percentage predicted by participants in the baseline survey, suggesting that their sense of time availability was accurate. 7 (30.4%) neither agreed nor disagreed, 3 (13.0%) disagreed.

7. Ability to get support needed to complete the qualification

27 out of 29 (93.1%) of participants agreed or strongly agreed that they would be able to get the support they needed to complete the qualification. 2 (6.9%) neither agreed nor disagreed.

In the end-point questionnaire, 19 out of 23 (82.6%) participants agreed or strongly agreed that they got the support they needed from their assessor to complete the qualification. 3 (13.0%) neither agreed nor disagreed, 1 (4.3%) disagreed.

Also in the end-point questionnaire, 19 out of 23 (82.6%) participants agreed or strongly agreed that they got the support they needed from their line manager or supervisor to complete the qualification. 3 (13.0%) neither agreed nor disagreed, 1 (4.3%) did not know.

(c) Participants' views on the impact the experience had on the way they worked or felt about their work

23 participants completed end-point questionnaires, in which they provided responses to a series of statements designed to assess the impact of the qualification on themselves, their aspirations and on their work.

1. Perception of the impact of the qualification on how far the participant feels encouraged to reflect on the way he/she works

20 out of 23 respondents (87.0%) agreed or strongly agreed with this statement. 3 (13.0%) neither agreed nor disagreed.

2. Perception of the impact of the qualification on how it has encouraged the participant to reflect on the way he/she supports others

21 out of 23 respondents (91.3%) agreed or strongly agreed with this statement. 1 (4.3%) neither agreed nor disagreed; 1 said that the statement was not applicable to them.

3. Perception of the impact of the qualification on how confident the participant feels that they are "working in the right way"

22 out of 23 respondents (95.7%) agreed or strongly agreed with this statement. 1 (4.3%) neither agreed nor disagreed.

4. Perception of the impact of the qualification on the participants' confidence to contribute in meetings

20 out of 23 respondents (87.0%) agreed or strongly agreed with this statement. 3 (13.0%) neither agreed nor disagreed.

5. Perception of the impact of the qualification on whether they feel encouraged to make changes to the way they work

20 out of 23 respondents (87.0%) agreed or strongly agreed with this statement. 3 (13.0) neither agreed nor disagreed.

6. Perception of the impact of the qualification on whether they feel encouraged to suggest improvements to the way things are done in their teams/departments

21 out of 23 respondents (91.3%) agreed or strongly agreed with this statement. 2 (8.7%) neither agreed nor disagreed.

7. Perception of the impact of the qualification on feeling able to take on more responsibilities

18 out of 23 respondents (78.3%) agreed or strongly agreed with this statement. 4 (17.4%) neither agreed nor disagreed, 1 (4.3%) disagreed.

8. Perception of the impact of the qualification on feeling encouraged to support other people to learn or undertake training

21 out of 23 respondents (91.3%) agreed or strongly agreed with this statement. 1 (4.3%) neither agreed nor disagreed. 1 (4.3%) disagreed.

9. Perception of the impact of the qualification on feeling able to do things they would previously have left to their manager or supervisor

17 out of 23 respondents (73.9%) agreed or strongly agreed with this statement. 5 (21.7%) neither agreed nor disagreed. 1 (4.3%) disagreed.

10. Perception of the impact of the qualification on feeling encouraged to stay within the Estates and Facilities department

18 out of 23 respondents (78.3%) agreed or strongly agreed with this statement. 5 (21.7%) neither agreed nor disagreed.

11. Perception of the impact of the qualification on feeling ready to consider applying for a higher-level job

16 out of 23 respondents (69.6%) agreed or strongly agreed with this statement. 3 (13.0%) neither agreed nor disagreed. 2 (8.7%) disagreed. 2 (8.7%) said that they did not know.

12. Perception of the impact of the qualification on feeling ready to consider doing further learning at a higher level

13 out of 23 respondents (56.5%) agreed or strongly agreed with this statement. 7 (30.4%) neither agreed nor disagreed. 1 (4.3%) disagreed. 1 (4.3%) strongly disagreed. 1 (4.3%) said that they did not know.

13. Perception of the impact of the qualification on feeling they have the opportunity for career progression

16 out of 23 respondents (69.6%) agreed or strongly agreed with this statement. 7 (30.4%) neither agreed nor disagreed.

14. Perception of the impact of the qualification on feeling more able to understand the 'bigger picture' and reasons "why we work the way we do"

20 out of 23 respondents (87.0%) agreed or strongly agreed with this statement. 3 (13.0) neither agreed nor disagreed.

15. Perception of the impact of the qualification on feeling able to contribute to the improvement of NHS services locally

20 out of 23 respondents (87.0%) agreed or strongly agreed with this statement. 3 (13.0) neither agreed nor disagreed.

16. Perception of the impact of the qualification on feeling encouraged to support others to make changes to the way they work

22 out of 23 respondents (95.7%) agreed or strongly agreed with this statement. 1 (4.3%) neither agreed nor disagreed.

17. Perception of the impact of the qualification on feeling like a valued member of staff

18 out of 23 respondents (78.3%) agreed or strongly agreed with this statement. 5 (21.7%) neither agreed nor disagreed.

Learners provided practical examples in their qualitative feedback in the end-point questionnaire of ways in which the qualification had had a positive impact on them, their job role and their aspirations. Examples of these practical examples are as follows, with quotations from participants in the [Appendices](#).

Learners told us that, as a result of undertaking the qualification, they had felt:

- able to question the ways things are done and suggest how to improve them
- able to manage change in the workplace
- able to understand work systems
- less reliant on management
- more confident in dealing with other departments
- more confident in supporting staff with problems
- they have the opportunity to support staff with their learning
- equipped with up-to-date knowledge that assists in team leadership
- more knowledgeable in general
- more valued
- ready to apply for a supervisor's job
- able to help new staff members learn the job
- able to voice ideas for improvement
- able to learn from other departments and to make changes as a result
- able to suggest cost saving measures
- able to contribute more, especially in relation to recent departmental changes
- more confident to make decisions on their own
- more confident to support colleagues who were now completing their SVQ2

The data gathered from learners' end-point questionnaires in relation to views on the impact of learning can be used to measure success against the Boards' individual planning for impact frameworks. Although each Board set different indicators of success, the data in this section can be used by Boards to measure success at Levels 2 (Learning) and 3 (Application of learning).

Line managers' responses

(d) Line managers' aspirations for their staff members as a result of undertaking the qualification

In the baseline questionnaire, line managers expressed ways in which they wanted the qualification to benefit their staff member. Their top responses are set out below, which we have ranked with the most desired benefits listed first (ranked by percentage score and weighted against those with most actual responses).

Ranking	Desired Benefit	Scores
1st	Increased awareness of the implications of their actions	strongly agree: 54.5% agree: 45.5%
2nd	increased confidence in their capabilities	strongly agree: 55% agree: 45%
joint 3rd	increased willingness to make decisions	strongly agree: 50% agree: 50%
joint 3rd	increased willingness to take ownership of tasks/areas of responsibility	strongly agree: 50% agree: 50%
4th	increased flexibility in their work	strongly agree: 50% agree: 50% neither agree nor disagree: 4.5%
joint 5th	increased confidence and capability to plan tasks and work	strongly agree: 45% agree: 55%
joint 5th	increased awareness of the impact on others, teams, patients and customers when we have to make changes	strongly agree: 45% agree: 55.5%

e) Managers' perspectives on the qualification

In the baseline questionnaire, line managers were uniformly positive in expressing their understanding of the qualification, its relevance to their staff members' jobs, the availability of evidence for staff members to uncover, and the time and support that would be available to support participants.

In the end-point questionnaire, those line managers who responded (a lower number than had responded to the baseline questionnaire) were again positive in their appraisal of the qualification. This appraisal included their assessment of the qualification's relevance to their staff member's work, the validity of the evidence their staff members produced, the support the staff member received from their assessor, and finally the support the line manager him/herself was able to give the staff member.

One line manager described moves made to better support a staff member who was not receiving adequate support due to the local "structure and support mechanism".

(f) Line managers' views on the impact of the qualification

In the end-point questionnaire, 13 line managers provided responses in relation to 18 statements that measure their views on project participants' increased effectiveness as employees in their department or service.

The end-point questionnaire asked line managers to indicate the extent to which they agreed that they perceived the following attributes in their staff members:

- increased awareness of the 'bigger picture' when we have to make changes
- increased flexibility in their work
- increased awareness of the implications of their actions
- increased willingness to make decisions
- increased confidence in leading a team
- increased confidence in their capabilities
- increased willingness to suggest service improvements to the way we do things in the team/ department or organisation
- increased willingness to take responsibility for things which don't go to plan
- increased willingness to continue to work in Estates & Facilities
- increased confidence and capability to plan tasks and work
- increased confidence to contribute to meetings
- interest in applying for a higher-level job
- application of their knowledge and skills from their qualification
- evidence from the qualification in their PDPR
- an interest in supporting other people to learn or undertake training
- an interest in doing more or higher-level training
- an increased willingness to take actions which lead to increased patient/client satisfaction and/or reduction in complaints
- they feel valued as a member of staff

We have not provided a detailed breakdown of scores against the individual statements, but have identified the following indications:

- Line managers tended to agree rather than “strongly agree” with the statements.
- Across all 18 statements, a mean average 88.9% of line managers’ responses agreed or strongly agreed with the statements. Where managers did not “agree or strongly agree” with statements, in all but one case they opted for a neutral response (neither agreeing nor disagreeing) or said that they did not know.
- Only one statement received a negative response from one line manager in relation to one staff member, in relation to increased flexibility in the staff member’s approach.
- A significant proportion of the responses were neutral (with line managers “neither agreeing or disagreeing”) in relation to the two statements:
 - interest in applying for a higher-level job
 - interest in doing more or higher-level training

We do not have evidence to explain why line managers offered cooler responses in relation to these two indicators of increased aspiration.

In their end-point qualitative feedback, managers made reference to staff members:

- being more positive in their actions
- having better understanding of why they do a particular job
- have more confidence now
- aspirations to move to a higher job band within the department
- having more focus, assertiveness and confidence when dealing with day-to-day tasks/issues
- being more willing to take a lead on specific tasks or key responsibilities such as staff development and the review process
- being more proactive and engaged
- undertaking more training (for example, assessor training)
- implementing change within their departments.

Line managers identified the most important change that they noticed in staff members, with 10 of the 13 line managers (76.9%) identifying confidence as the most important change. One identified a positive attitude, another mentioned ability to make decisions, and a third referred to the staff member appearing to feel more valued.

We provide direct quotes from managers in the [Appendices](#).

The data gathered from line managers’ end-point questionnaires in relation to the impact of learning can be used to measure success against the Boards’ individual planning for impact frameworks. Although each Board set different indicators of success, the data in this section can be used by Boards to measure success at Levels 2 (Learning) and 3 (Application of learning).

Senior managers' responses

(g) Senior managers' views on the impact of the qualification on staff members and more broadly on services

Senior managers from five of the six Boards responded to an end-point questionnaire, to provide their views on the impact of the qualification and to share any future plans that have come about as a result of the project.

3 of the 5 senior managers (60%) said that, from their experience of staff in their services completing the qualifications, they planned to include them as appropriate qualifications for job descriptions/job adverts.

All 5 (100%) of the senior managers said that as a result of the experience of staff members undertaking qualifications in this project, they planned for other staff to undertake qualifications in the future.

The senior managers were asked to state the extent to which they believed their line managers:

- saw the qualification as a relevant qualification for Estates and Facilities staff
- understood the qualification and what was involved
- were willing to support staff to undertake further qualifications
- understood the impact of staff undertaking a qualification can have on the service
- were supporting staff to use their knowledge and skills to benefit the service
- understood the benefits of having qualified staff

1 (20%) senior manager neither agreed nor disagreed with the first statement, with the other 4 agreeing or strongly agreeing. 1 (20%) senior manager neither agreed nor disagreed with the second statement, with the other 4 agreeing or strongly agreeing. All 5 senior managers (100%) agreed or strongly agreed with the subsequent 4 statements. This suggests overall that the senior managers have confidence in the line managers to make the most of work-based learning for staff members and for the services.

Senior managers were asked to indicate the extent to which they agreed that they perceived a number of attributes in their staff members as a result of undertaking the qualification.

All 5 senior managers (**100%**) agreed or strongly agreed with the following statements:

- increased awareness of the 'bigger picture' when we have to make changes
- increased flexibility in their work
- increased awareness of the implications of their actions
- increased willingness to make decisions
- increased confidence in leading a team
- increased confidence in their capabilities
- increased willingness to take ownership of tasks/areas of responsibility
- increased willingness to suggest service improvements to the way we do things in the department
- increased willingness to take responsibility for things which don't go to plan
- increased willingness to continue to work in Estates & Facilities
- increased confidence and capability to plan tasks and work
- an increased confidence to contribute to meetings
- interest in applying for a higher-level post, if it becomes available
- application of their knowledge and skills from their qualification
- interest in supporting other people to learn or undertake training
- how to contribute more to the improvement of NHS Services in their area
- increased willingness to take actions which lead to increased patient/client satisfaction and/or reduction in complaints
- they feel valued as a member of staff

For the following two statements, 4 of the 5 senior managers (**80%**) agreed or strongly agreed, while 1 neither agreed nor disagreed:

- evidence to add to their PDPR
- interest in doing further learning at a higher level

Senior managers identified the key positives or benefits for services of staff members achieving qualifications, as follows:

- increased awareness of the purpose of a role when being asked to undertake certain responsibilities and tasks, which led to the easier implementation of change
- that the staff member has set an example to others that it can be done
- increased confidence leading to:
 - increased and better outputs
 - the staff member being able to make decisions on their own for their individual teams
 - more effective leadership of teams
- improved feedback from patients/visitors and staff
- a better qualified workforce whose members feel they are part of a profession or vocation, leading to an increased level of responsibility and accountability
- staff feeling valued
- staff members having increased confidence to make decisions
- increased confidence in carrying out a role and hopefully staying within Estates and Facilities.

3 of the 5 senior managers (60%) identified that some staff members had been able to take on more or different duties as a result of completing the qualification, giving the following examples:

- staff members taking on additional responsibilities in Health & Safety, People Management, Training and Development and Quality Improvement
- two staff members becoming supervisors.

The data gathered from senior managers' questionnaires (which were only undertaken at the end-point) can be used to measure success against the Boards' individual planning for impact frameworks with particular reference to Level 4 (Longer-term impact).

(h) Whether participants and managers would recommend work-based learning

21 out of 23 participants (91.3%) said that they would recommend the qualification to a colleague. 1 (4.3%) said that they would not, 1 (4.3%) did not know.

They gave a range of reasons, including that:

- [the qualification] helps support staff by providing the confidence to progress in their career
- learning can help a manager to be better at their job
- the qualification could provide more clarity and competence in a job role
- the qualification provided opportunities for monthly team meetings that really encouraged team building
- it was enjoyable as well as interesting
- it was a supportive experience, 12 line managers provided a qualitative response to a question in the end-point questionnaire relating to whether they would recommend other staff take the qualification. 11 (91.7%) said that they would. 1 (8.3%) said they possibly would but did not elaborate on their tentative response.

Line managers said that they would recommend the qualification to other staff, for a range of reasons, including that:

- a theoretical understanding is always helpful for people in managerial roles
- it can increase flexibility, professionalism, ownership and quality of work
- it provides staff with an excellent opportunity for skills they already have to be recognised officially
- it can also open doors to continued learning and opportunities which they may otherwise not be aware of
- it would be very beneficial to anyone who is not confident in their own abilities, providing them opportunities to see the good in the work they are doing

Discussion

Overall, the participants and their line managers were positive in their views on the qualification.

The statement against which responses were least positive related to participants' ability to find time to complete the qualification. Several participants expanded on this in their qualitative feedback, stating that their everyday work often had priority, with their studying undertaken at home. However, the extent to which participants agreed that they had found enough time was in line with their expectations as set out in the baseline questionnaire, suggesting that they recognised from the beginning that time could be an issue.

The data gathered from learners' and line managers' baseline and end-point questionnaires in relation to views on the qualification can be used to assess impact against the Engagement level (Level 1) of the Boards' individual planning for impact frameworks. Each Board set out 'Needs' in this area, with commonality across all the frameworks in, for example, the need for participants and managers to see the qualification as relevant to roles. Each Board set different targets to meet, with high aspiration. For example, "8 out of 10 see the qualification as relevant to their role", or "All participants see the relevance of the qualification ...". A target of "all", or 100%, against such a need might be too aspirational and hard to meet. Assessment of success against the planning for impact frameworks should happen locally, with a review of the realistic targets set against ambitions in the future impact planning.

(i) Suggestions by participants for changing the delivery/assessment of the qualifications

Of the 13 qualitative suggestions that participants made in the end-point questionnaire relating to changes they would make to the delivery/assessment of the qualification, 7 (53.8%) made reference to the need for sufficient time to be allocated to complete the qualifications.

Other suggestions included the desire for more training sessions to be available, including with peers, a more locally-based assessor, earlier engagement of management in the process, and also a request for language within study materials to be more appropriate for a non-profit work environment.

(j) Challenges identified

Very few negatives emerged during the project. Participants, line managers and senior managers emphasised positives throughout their feedback.

There were challenges for a number of participants with finding time to complete qualifications, but this is in line with concerns for other work-based learning projects, including the Business and Administration Demonstrator Project, and the Pilot of the SVQ Level 2 in Facilities Services that reported in 2014.

There is a disconnect between the overall original purpose of the project, which was to implement and sustain the Estates and Facilities Education Pathways, and the evidence produced to inform this evaluation. The evidence we have is largely focused on the impact of qualifications, rather than on the impact of implementing and sustaining the Education Pathways.

Additional impacts identified

Boards provided information in final reports about plans to sustain the impact of their demonstrator project. This information contains examples of ways in which the project has led to the development of a learning culture within the Boards' E&F services, specifically around:

- staff members' increased interest in and enthusiasm for work-based learning
- the roll out of and planning for increased work-based learning opportunities within the service
- staff members' increased capacity to support colleagues to learn and develop, including by some becoming qualified assessors
- staff members' interest in and willingness to take on new responsibility and/or roles.

Examples provided by the Boards include:

Increased interest in and enthusiasm for work-based learning

Further candidates will be enrolled onto the qualification for the coming year and interest has been high in the staff groups for this, the department now has a waiting list for starting.

NHS Borders

Staff are aware of the qualification through advertising and their PDPR meetings and are coming forward asking to be put on the waiting list. There may be more Supervisors gaining the Assessor qualification in the future as well as expanding the range of qualifications available. The challenge will be to keep the momentum going and embedding the SVQ system into business as usual to sustain the learning culture.

NHS Borders

Roll out of and planning for increased work-based learning opportunities within the service

Moving forward the department will expand on the range of qualifications to include SVQs more relevant to other areas eg laundry workers, and for Supervisors. The Assessors and Manager will aim to meet regularly for informal standardisation meetings and to try to give staff time for their qualification during their shifts.

NHS Borders

In addition, 9 assistant managers and supervisors are currently undertaking an HNC in Facilities Management to further embed the Facilities and Estates career pathways in personal development planning with a view to a more systematic approach to succession and service planning.

NHS Lothian

5 of the 6 SVQ3 Candidates have been retained. 3 of the 6 candidates are undertaking further qualifications including the L&D9I Award to become assessors themselves.

NHS Lothian

Increased capacity to support colleagues to learn and develop, including through staff becoming formal assessors

There have also been tentative signs that staff are considering career development. One member of staff is now in a promoted role whilst an additional two have enhanced their duties in their current role. These two individuals are now undertaking an L&D9DI award to become SVQ Assessors themselves. This enhances the capacity of Facilities to deliver SVQ qualifications beyond the initial demonstrator project.

NHS Lothian

Facilities now have two full time assessors and two trainees who are currently supporting band 2 staff to undertake a modern apprenticeship in hospitality at SCQF Level 5. As with the demonstrator project this seeks to enhance candidate's ability to contribute to service improvement whilst considering a higher level of learning in terms of confidence and skills level.

NHS Lothian

Interest in and willingness to take on new responsibility and/or roles

The E&F team's willingness to contribute to several work streams associated with the Staff Governance agenda is huge. There is an improvement that has been created in E&F around learning, development, communication and staff value which is infectious and with the outcomes of phase two of the project, hopefully sustainable.

NHS Lothian

One [participant] is now leading on eKSF reviews and developing and implementing operational processes and the other leading on various projects.

NHS Orkney

Both participants now deputise for their line managers and feel able to suggest improvements and are more confident in contributing in meetings.

NHS Orkney

It should be noted that both participants have stated that they would not consider applying for a higher level post or consider further learning at a higher level, however both candidates have had a role change since starting and stated that the Qualification has made them more confident in their career.

NHS Orkney

CONCLUSIONS

Section 3

- 1.** There is clear evidence across all responses (and from all levels of respondents) of positive impact on participants and their departments/services from undertaking qualifications. The impact of the SVQs in Facilities Services and Management had already been evidenced through earlier NES-funded pilot projects, so the use of the qualifications in this project was likely to also have had positive impact.
- 2.** There is evidence of increased interest among some participants for taking part in further learning, in supporting colleagues to do the same, and in taking on new roles and responsibilities. This suggests that the demonstration of the value of the Education Pathways through this project has contributed a shift towards a learning culture. A learning culture within services should lead to more staff in E&F services becoming qualified (and thereby being more effective and ready to progress in their careers).

APPENDICES

Section 4

Appendix 1: Participants' job roles

Job roles, as described in the baseline response, were as follows (in alphabetical order):

- Acting domestic manager
- Assistant domestic manager
- Assistant laundry manager
- Assistant manager
- Catering team leader
- Deputy catering manager
- Domestic
- Domestic & laundry supervisor
- Domestic assistant/porter
- Domestic supervisor
- Domestic/porter
- Facilities manager
- Facilities site manager
- General manager
- General services supervisor
- Laundry supervisor
- Maintenance assistant
- Porter
- Porter/driver
- Portering supervisor

Appendix 2: Evidence of impact from participants and managers

Impact statements from participants:

Participants made the following statements in their questionnaire responses. We have made some of the statements more concise and removed any names or other potential identifiers. We have not changed the words unless to clarify meaning.

Statements relating to improving ways of working:

Made me question more the ways they are done and how to improve them.

I have looked at other departments and how making small changes within my team can help as you [see] the bigger picture.

There was also a suggestion I made in regard to cost savings of time for personnel and for materials in an adjacent department and this got the support from the other two departments.

Able to manage change in the work place areas or work groups much better.

Statements relating to increased autonomy:

- Understanding work systems made me even less [reliant] on management.
- I can approach the supervisors and suggest ideas for improvement, before I would just keep ideas to myself.
- Gave me the confidence to make decisions on my own rather than asking the manager for advice.
- Dealing with issues myself not relying on the manager to make decision for me.

Statements relating to increased confidence to make contributions:

- Gave me more confidence in dealing with other departments, supporting staff with problems involving working practices .
- In [meetings] to do with the new build I feel more confident to voice my opinion.
- I feel I have contributed more, especially the recent changes in my department. I have been more vocal with ideas of how to approach these changes.

Statements relating to supporting staff/colleagues with learning:

- This has given me the opportunity to support staff with their learning and undertaking qualification .
- Covering for the Learning and Department Advisor on a few occasions has been an interesting opportunity for further training of staff and how they responded to the in-depth training on all subjects.
- Gave me the confidence to support domestic assistants who are now completing their SVQ2 and I am now doing the assessors qualification.
- Completing this course has been a huge benefit to me training staff when they become members of the NHS and passing on the knowledge I have to them is a very worthwhile task.
- I am happy to help new staff members learn the job I am doing by showing them the right way.

Statements relating to increased confidence and skills in management and leadership:

- Up to date knowledge now helps me lead my team better, and the tasks that are within my authority I have more confidence in doing, as going through [the] course allowed me to investigate whole processes.

Statements relating to increased interest in taking up further learning:

- Encouraged me to do more learning to help me be the best I can be in my job role and supporting of others.

Statements relating to feeling ready to apply for a higher-level job:

- Being able to apply for a Supervisors job.

Impact statements from managers

- Line managers made the following statements in their questionnaire responses. We have made some of the statements more concise and removed any names or other potential identifiers. We have not changed the words unless to clarify meaning.
-

Statements relating to improved effectiveness:

- I feel that the members of staff have been more positive in their actions and have a better understanding of why they do the job role.
- [*This staff member*] continues to progress in his role and is constantly improving his skills through working practice.
- More proactive and engaged.
- Understanding why [*they*] do what they do and to be better at their job.

Statements relating to increased confidence leading to improved working:

- [*This staff member*] now leads on the staff development and review process for Domestic and Laundry Services which incorporates more than 30 staff. She has been involved in the equipping and planning process for both services for our new hospital facility. She readily contributes in meetings and makes valuable contributions to increased efficiencies and service improvement projects. She recently contributed to a staffing restructure/consultation process and supported staff through this change process. [*This staff member*] is now much more engaged and motivated regarding her future development. Previously she lacked the confidence to consider promotion or increased responsibility.
- I have found that [*the staff member*] has more confidence now and willing to help with new starts when they start and lets them shadow with him.
- ... more assertiveness and confidence when dealing with day to day tasks/issues.
- Ability to understand a wider picture. Becoming more confident about her day to day dealings with all aspects of post particularly in people management and problem solving.
- More confident in their job.
- Completion of qualification and satisfaction it brought them.
- ... her increased confidence and her new-found ambition.
- Increased confidence that he knows his job. They are aware of the cooperative needs and service.

Statements relating to increased interest in undertaking further learning:

- [*This staff member*] is now undertaking assessor training and [*another staff member*] would like to do further training but has taken a year out to breath, they have both implemented change within their departments.
- Increased aspiration to apply for a higher-level job
- Both candidates have expressed interest in moving to a higher band within the department.

Statements relating to increased willingness to take on new responsibility:

- Willing to lead on new elements of work. Taking a keen interest in other staff that are working on other courses.
- Taking lead role on change management.
- Tell me about the qualification you studied for ...

Statements relating to increased ability/interest in supporting others to learn:

- Actively supporting others to learn.

Case studies

Case studies about how staff were supported to achieve qualifications through the NHS Border's demonstrator project are available on the [Estates & Facilities Hub](#)⁵.

Natalie Macdonald, Facilities Manager, talks about NHS Borders' experience of the demonstrator project [here](#)⁶.

⁵ <https://learn.nes.nhs.scot/1037/estates-and-facilities-hub/estates-and-facilities-education-pathways/education-pathways-making-them-work-for-you>

⁶ <https://vimeo.com/252493421>

This resource may be made available, in full or summary form, in alternative formats and community languages.

Please contact us on **0131 656 3200** or email altformats@nes.scot.nhs.uk to discuss how we can best meet your requirements.

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