

Organizational Effectiveness through Collaboration

*“Recent research forecasts
an ongoing convergence of
training and human resources operations,
all coalescing into a broader talent management
function. It’s integration;
it’s a holistic approach;
it’s synergy.”*

Tim Sosbe, “Synergizing HR and Training,” *T&D*, June 2007

2008 Western Region IPMA-HR Annual Conference

Facilitators:

Cecile Morris and Donna Weeks

April 2, 2008

Why Are We Here?



Goal: To describe one organization's approach to identifying a critical HR need and, through collaboration with all stakeholders, addressing it through training

Objectives: Participation in this half-day session will enable you to:

- Identify organizational needs that can be addressed through training
- Collaborate with other HR colleagues and support staff to develop a comprehensive supervisory training program
- Use proven tools and techniques to design effective training
- Equip your supervisors with the skills and knowledge necessary for success

Benefits: Participation in this session offers these benefits:

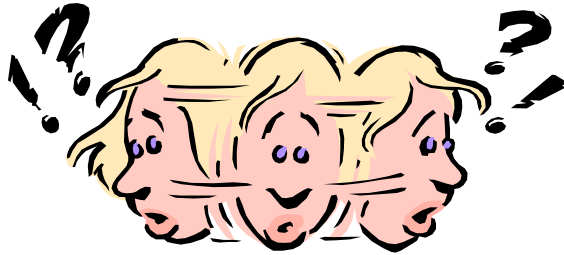
- A road map for creating your own supervisory training program
- Savings in time, money and effort

Agenda



- Introductory Remarks
- The Context
- Design Considerations
- Training Design Cycle
- The Design Process
- The Outcome
- Where We Are Today
- Next Steps

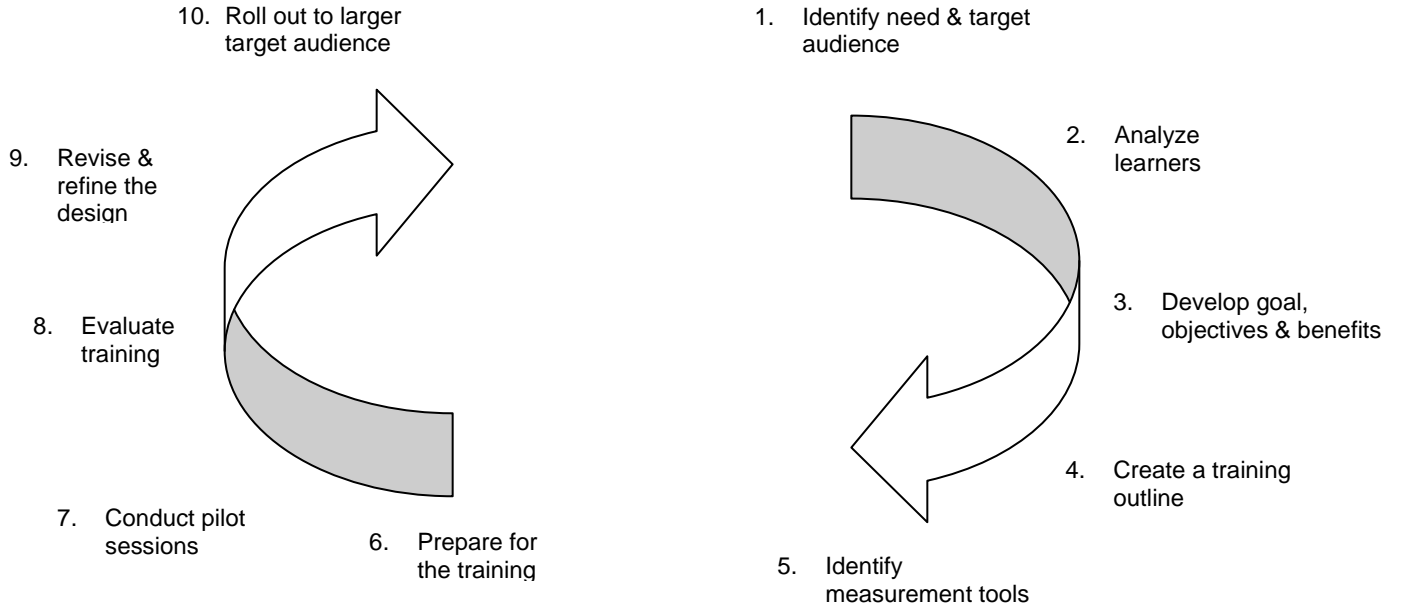
Group Exercise



What are the potential effects to an organization of having untrained first level supervisors?

Notes:

Training Design Cycle





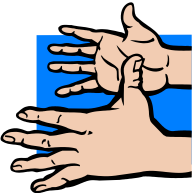
Principles of Adult Learning

- Autonomous and self-directed
- Accumulated knowledge and life experiences relevant to the topic
- Goal-oriented
- Relevancy-oriented
- Practical
- Need to be shown respect
- Their experience can be a resource
- Established values, beliefs and opinions
- Ability to learn is not impaired by age—style and grace
- Relate new knowledge into previous knowledge
- Bodies need breaks
- Have pride
- Deep need to be self-directed
- Individual differences among people increase with age
- Problem-centered orientation to learning

Source: Malcolm Knowles

Learning Styles

Different people have different learning preferences that stem from how they learn best. There is no right or wrong way to learn. There are three basic learning styles:

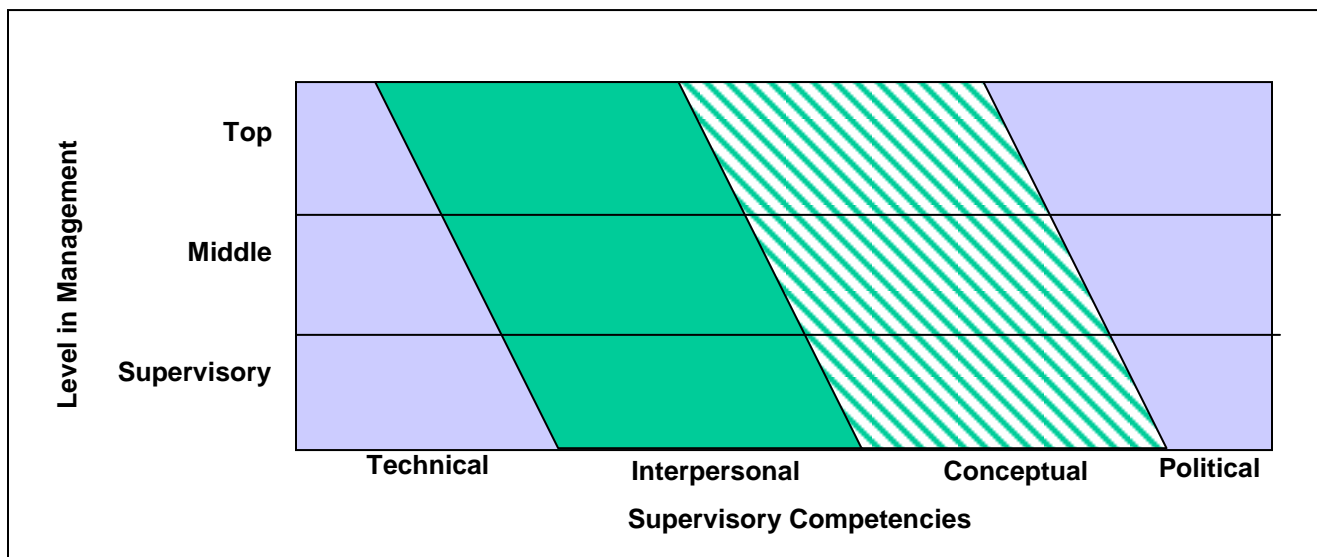
Visual	Learning by looking at images.	
Auditory	Learning by listening.	
Kinesthetic	Learning by experiencing and doing.	

What is your dominant learning style?

How Do You Like to Learn?

	Visual	Auditory	Kinesthetic
Learning	Learns by seeing; benefits from demonstrations. Forms mental picture to make sense of what is happening. <input type="checkbox"/>	Learns through verbal instruction, either from others or self. <input type="checkbox"/>	Learns by doing and hands-on involvement. Feels way through experiences. Understands big picture before detail. <input type="checkbox"/>
Memory	Remembers faces, forgets names. Takes notes and looks at them. Recalls colors and shapes easily. <input type="checkbox"/>	Remembers names, forgets faces. Remembers by hearing then repeating. <input type="checkbox"/>	Remembers events, forgets details. Takes notes, but does not look at them. <input type="checkbox"/>
Problem Solving	Is deliberate; plans in advance. Organizes thoughts by writing them. Keeps lists of problems or things to do. <input type="checkbox"/>	Talks problems out or thinks them through verbally. Talks to self. Can go around and around before deciding. <input type="checkbox"/>	Attacks problems physically. Impulsive; often selects solutions involving greatest activity. Needs guidance through steps of a problem. <input type="checkbox"/>
Communication	Can talk quickly, but rarely at length. Becomes impatient if extensive listening is required. <input type="checkbox"/>	Enjoys listening, but sometimes can't wait to talk. Goes into long, detailed descriptions. Uses internal dialogue to work through problems. <input type="checkbox"/>	Gestures when speaking. Doesn't listen well; stands close while speaking or listening; paces to think. Often pauses while speaking. Is unclear about body language. <input type="checkbox"/>
Language	Uses visual words such as see, look, watch. "I see what you mean." "I see it clearly now." <input type="checkbox"/>	Uses verbal words such as ask, listen, hear, tell. "That rings a bell." "I hear you." <input type="checkbox"/>	Uses action words such as impact, get, take, make, understand. "I get the picture." "I feel good about that." "I'll handle that." <input type="checkbox"/>
Other	Is affected by color of room and order or chaos. Seldom gets lost. <input type="checkbox"/>	Speaks with a melodious voice. Does not always trust feelings. Likes music. <input type="checkbox"/>	Can't sit still long. Should sit where he/she won't bother others. Listens better if touched. <input type="checkbox"/>

Supervisory Skills Model



Technical
Competence:

The ability to apply specialized knowledge or expertise. Having thorough knowledge of what your work unit does and the ability to apply it.

Interpersonal
Competence:

The ability to work with, understand, communicate with, influence and motivate other people, both individually and in groups.

Conceptual
Competence:

The mental ability to analyze and diagnose complex situations. "Seeing the forest *and* the trees."

Political
Competence:

The ability to enhance power, build a power base, and establish the "right" connections in the organization.

Source: Adapted from model created by R. L. Katz

Role of the “Ideal” Supervisor

From the Controller’s Office

1. Act as an agent of the organization
2. Provide a safe work environment
3. Establish a positive climate within the work unit
4. Apply policies and work requirements consistently and fairly
5. Plan and conduct a successful recruitment process
6. Orient new employees to the workplace
7. Train, instruct, and encourage all staff to work effectively
8. Plan and maintain time and work schedules
9. Coordinate the activities of the unit to meet fiscal goals
10. Initiate or recommend personnel actions such as promotions, transfers, pay increases and discharges
11. Communicate performance expectations, provide feedback and conduct performance evaluations
12. Respond to concerns and complaints
13. Counsel and discipline staff according to policy
14. Promote quality products and services for the unit
15. Adjust and improve work processes
16. Establish a climate that promotes cross-cultural competency

The Dot Activity

Directions:

1. Review the list below and on the wall.
2. Select 3 items that you most frequently encounter on a daily basis as a supervisor. Use *red* dots to indicate your choices in Column 3 on the wall chart.
3. Select 3 items that you would like to do better. Use *blue* dots to indicate your choices in Column 1 on the wall chart.

Column 1	Column 2	Column 3
Like to Do Better	Item #	Do Most Frequently
	1. Act as an agent of the organization	
	2. Provide a safe work environment	
	3. Establish a positive climate within the work unit	
	4. Apply policies and work requirements consistently and fairly	
	5. Plan and conduct a successful recruitment process	
	6. Orient new employees to the workplace	
	7. Train, instruct and encourage all staff to work effectively	
	8. Plan and maintain time and work schedules	
	9. Coordinate the activities of the unit to meet fiscal goals	
	10. Initiate/Recommend personnel actions, such as promotions, transfers, pay increases and discharges	
	11. Communicate performance expectations, provide feedback and conduct performance evaluations	
	12. Respond to concerns and complaints	
	13. Counsel & discipline staff according to policy	
	14. Promote quality products and services for the unit	
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Measuring Training Effectiveness

Classic Levels of Training Evaluation

Donald Kirkpatrick developed a model of training evaluation that guides the practice of measuring the outcomes of training in many countries. His model consists of four levels that range from the relatively simple to the more complex.

Level 1: *Reaction*. Measuring the reaction of program participants. This level measures customer satisfaction, because those who attend trainings are customers whose reactions significantly affect the success of present and future programs. (“Smile sheets”)

Level 2: *Learning*. Measuring the extent to which knowledge has been increased, skills improved, and attitudes changed as a result of the program. (i.e. pre- and post-tests)

Level 3: *Behavior*. Measuring the extent to which participants changed their behavior as a result of their participation in the program. (Measured through observation)

Level 4: *Results*. Measuring the final results brought about by changes in participants’ behavior. (Return on Investment, etc.)

Unfortunately, more organizations use “smile sheets” than attempt to measure learning. Few track on-the-job behavioral changes, and still fewer engage in the difficult task of specifying the ROI in training. If training is to be thought of as a key business activity, we need to model accountability regarding the value we claim to add to organizations.

Common Measurement Tools

- Action planning.
- Course/Session evaluations.
- Survey learners at some point after training as to whether or not they’re using the skills.
- Survey learners at some point after training on their recall of content learned.
- Observation on the job.
- Conduct manager/supervisor orientation prior to training so they’ll know how to reinforce skills addressed in training.
- Incorporate skills addressed in training into learners’ job descriptions and performance reviews.
- Conduct follow-up sessions with learners.

Case Study #1: Environment Health & Safety

Each group will discuss one scenario and develop answers to the following questions:

- ✓ What are the key issues that need to be addressed in your case?
 - ✓ If you were the supervisor, what questions would you need to have answered before you could take any action?
 - ✓ What laws, regulations, policies and procedures would guide your decision?
 - ✓ Who would you need to talk with about the situation?
 - ✓ How would you open a conversation with the employee who has threatened to go to Cal-OSHA?
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Your department is scheduled to move to a new, larger space in a few months. Until then, the group you supervise has moved to a smaller temporary location that once belonged to a custodial department. The custodial department left behind some old containers filled with chemicals. You're not sure how to dispose of the chemicals, so you've left them in the cabinet and ignored them.

Meanwhile, you continue to hire staff in preparation for expanding your department once the permanent move takes place. One new-hire has requested special workstation accommodations.

You are storing your office supplies and furniture in the temporary location because you know you'll need them in the new location. Your staff has complained about the crowded conditions in the office, including the storage problems, over-stacked shelves, and the difficulties of getting to their workstations. The hallway to the back door is completely blocked with boxes.

You haven't held a fire drill in the months that you've been frantically moving and re-settling, and since everyone can get out at the end of the day to go home, you figure it's not really a problem. You haven't attached the shelves to the walls because it's only a temporary location that you don't own.

Today an employee comes to you with a written complaint about the unsafe and unhealthy conditions in your department, and threatens to call Cal-OSHA if you don't fix everything right away.

Case Study #2: Risk Services

Each group will discuss one scenario and develop answers to the following questions:

- ✓ What are the key issues that need to be addressed in your case?
 - ✓ If you were the supervisor, what questions would you need to have answered before you could take any action?
 - ✓ What laws, regulations, policies and procedures would guide your decision?
 - ✓ Who would you need to talk with about the situation?
 - ✓ How would you open a conversation with Lin?
-

Lin is one of four clerical employees you supervise. She has worked at the organization for 4+ years and in your unit for just under a year. Workloads in your unit have clearly increased this year.

Three months ago Lin mentioned that her neck and shoulders were really “tight” at work, something she attributed to the increased workload and stress in general. She subsequently mentioned this to you a couple more times.

Today, Lin said, “It really hurts to move my neck and I think I need to see a doctor.” She further says she’s heard of a really good doctor her friend is seeing and wants to go there.

Lin calls the day after seeing a doctor to say she has been given a temporary work restriction specifying no keyboarding or mousing and no repetitive tasks exceeding 20 minutes at a time. She says she thinks she would rather stay home.

Program Facilitators

Cecile Morris:

Cecile Morris has been with UC Santa Cruz since October 2000. She is the Sr. HR Partner supporting the Division of Student Affairs. Prior to coming to the University she worked in management and HR for NovaCare Inc., a National Rehabilitation Company. She is a Development Dimensions International (DDI) and Managing Personal Growth (MPG) certified facilitator and co-facilitates several training programs on campus including performance management. She is nationally certified through HRCI (Human Resource Certification Institute) as a SPHR-CA (Senior Professional in Human Resources) and is on the HRCI exam writing panel for the California exam. She has her MBA, JD and is working on her PhD in Human Resources through Capella University.

Email: cecile@ucsc.edu

Donna Weeks:

Donna Weeks is a Senior Training Consultant at the University of California, Santa Cruz, where she has worked since April 2003. Her focus is organization development, group facilitation, custom training design and classroom training. Prior to her employment at UCSC, Donna owned her own consulting firm for over twenty years in the Sacramento area and in Santa Cruz. She has consulted to a variety of private & public sector organizations including Intel, Applied Materials, Hewlett-Packard, the State of California, the City and County of Sacramento and more than 50 healthcare facilities nationwide,.

Donna is a UCLA graduate and also holds a Master's degree in Educational Psychology from the University of La Verne.

Email: dweeks@ucsc.edu