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The Organizational Impact of Leadership Training at the Jewish Home of Rochester

Abstract

The Jewish Home of Rochester sought the help of Fulcrum Consulting to develop leadership skills in management. Donald Kirkpatrick is generally credited with developing one key conceptual model for training evaluation. The first three of Kirkpatrick's four level evaluation model was used as the basis of the design for evaluating the organizational impact of the leadership program implemented at the Jewish Home of Rochester. The participants of this study were chosen at random by the Vice President of Human Resources. Based on the results of the focus groups and questionnaires, leadership has improved at the Jewish Home of Rochester.

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The Organizational Impact of Leadership Training at the Jewish Home of Rochester

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ABSTRACT

The Jewish Home of Rochester sought the help of Fulcrum Consulting to develop leadership skills in management. Donald Kirkpatrick is generally credited with developing one key conceptual model for training evaluation. The first three of Kirkpatrick’s four level evaluation model was used as the basis of the design for evaluating the organizational impact of the leadership program implemented at the Jewish Home of Rochester. The participants of this study were chosen at random by the Vice President of Human Resources. Based on the results of the focus groups and questionnaires, leadership has improved at the Jewish Home of Rochester.
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CHAPTER ONE

Overview

Training is a planned effort by a company to facilitate employees' learning of job-related competencies. These competencies include knowledge, skills or behaviors that are critical for successful job performance” (Noe, 1999). Unfortunately, training programs are often poorly evaluated. It is all too common for organizations to implement training programs with little or no evaluation. For those who do, very few actually measure the information that helps them to determine the overall effectiveness of the evaluation and/or change the program to better meet the needs of trainees and the organization.

Purpose of the Study

In order to increase leadership skills in supervisors and managers, The Jewish Home of Rochester has invested in a training program conducted by Fulcrum Consulting Inc. The purpose of this study was to analyze the training program that was being offered to managers and supervisors. This study has evaluated the impact of the leadership training on the organization.

The Jewish Home of Rochester

The Jewish Home of Rochester was founded on the principle to go beyond basic care-taking and enable residents to reach their maximum potential in an environment of warmth and dignity. As a result, they are continually creating new services and expanding options to a new generation of seniors. This has helped the Jewish Home of Rochester to take the lead in senior care. Their philosophy is to remain at the forefront of
the continuously changing field of senior care. They are committed to offering their community the best in health and life care services while remaining a foundation of community service and family-oriented care (Retrieved from www.jewishhomeroch.org November 21, 2005).

Problem Statement

An outside consultant from Fulcrum Consulting, Inc. provided training and development to 30-35 supervisors and managers of the Jewish Home of Rochester. These training sessions were held in September, October, November and December of 2005. Given the Jewish Home of Rochester’s investment in this training, it is important to understand how the program has impacted the organization for the Jewish Home to see the return on investment. This will help in justifying future training. Thus, this study examines the organizational impact of the leadership training program.

Significance of the Study

The significance of the study is that it is important to understand if the leadership training at the Jewish Home of Rochester has reached the four levels of Kirkpatrick’s evaluation model. If the leadership training has reached the fourth level of Kirkpatrick’s evaluation model and has produced positive results, then the program was successful.

Project Background

Leadership development emphasizes developing the competencies that comprise effective leadership. Leadership has been defined as “influencing others to accomplish organizational goals” (Tubbs, 2005). Leadership has also been defined by McCauley and VanVelsor (2004) as the collective activities of organizational members to accomplish
the tasks of setting direction, building commitment, and creating alignment. Leadership researchers Kouzes and Posner (2004) wanted to identify crucial leadership behaviors. They conducted a study where they asked hundreds of managers to rate exceptional leaders. From this study they developed a long list of statements describing leadership. They examined the results and identified five clear factors. These factors include challenging the process, inspiring a shared vision, enabling others to act, modeling the way and encouraging the heart.

Knowing the characteristics of leaders often helps to understand how a leader might affect an organization. Some may think of great leaders as being born with a natural talent to lead. However there is increasing evidence that leadership can be taught as well as learned.

Training is a planned effort by an organization to facilitate employees’ learning of job-related competencies, and can be used to train leadership skills as well. These competencies include knowledge, skills or behaviors that are essential for successful job performance (Noe, 1999). Training and development as defined by Swanson and Holton (2001) is a process of systematically developing work-related knowledge and expertise in people for the purpose of improving performance. Unfortunately, training programs are often poorly evaluated. “Evaluation begins with a clear identification of the purpose or results expected from the training program. By focusing on the purpose and results, evaluators are guided to the reasons that the training program has been developed and the changes and improvements in learner performance that should result from training” (Berdinelli, 2003). It is all too common for organizations to implement training
programs with little or no evaluation. For those who do, very few actually measure the information that helps them to determine the overall effectiveness of the evaluation. Specifically, proper evaluation should question the organizational impact of a training program. According to Pershing and Pershing (2001) “organizations are recognizing both the importance of training in improving performance and productivity and the significant investments of time and money that are being devoted to employee training. Organization decision-makers and training professionals want to be sure that training is accomplishing the intended purposes, while using resources as efficiently as possible” (p.73).

Donald Kirkpatrick is generally credited with developing a key conceptual model for training evaluation. His model, which has been widely adopted since 1960, remains a convenient and easily understandable way to think about evaluation in general. Kirkpatrick’s model describes four levels of evaluation: participant reaction, participant learning, participant on-the-job behavior, and organizational results (Rothwell, 2005). The leadership training at the Jewish Home of Rochester was evaluated using this model.
CHAPTER TWO

Literature Review

The Jewish Home of Rochester sought the help of Fulcrum Consulting to develop leadership skills in management. Fulcrum Consulting discovered, through focus groups and interviews, the need for leadership training. The key issues needing attention were communication, consistency with policies, and holding people accountable for their actions, a better sense of teamwork and more recognition to those who deserve it. Having an understanding of the knowledge, skills and attitude a good leader should possess will help to determine what should be taught and developed in a leadership training program.

Research by Burns, Kouzes and Posner and House has suggested that there are many attributes of a successful leader. It is also important to understand how training will impact individuals as well as the organization. Once the knowledge, skills and attitude of an ideal leader are established training can be implemented to enhance these qualities. It will then be necessary to evaluate the impact of this training program.

In this section, I discuss what current research has revealed about leadership skills, how training at the Jewish Home of Rochester was developed around the organization’s need to improve their leaders, and Kirkpatrick’s four-level model of training evaluation. The four levels of evaluation are then explained in detail.

Defining Leadership

Leadership development emphasizes developing the competencies that comprise effective leadership. Leadership has been defined as “influencing others to accomplish
organizational goals” (Tubbs, 2005). Leadership has also been defined by McCaulley and VanVelsor (2004) as the collective activities of organizational members to accomplish the tasks of setting direction, building commitment, and creating alignment. Setting direction is the articulation of mission, vision, values and organizational purpose. Building commitment is the creation of mutual trust and accountability that addresses how the team can stay together. They also suggest that creating alignment is finding common ground and areas of interrelated responsibility that brings a shared understanding of the situation. Finally, the process of completing these tasks can be understood from a variety of perspectives such as viewing leadership as an individual activity carried out by people in positions of authority to viewing leadership as a collective activity carried out by groups of individuals, communities, and organizations who share work (Drath, 2001). Thus, leadership is the outcome of interactions between people. If these interactions lead to the tasks of direction, commitment, and alignment being accomplished, then leadership capacity is present and optimal levels of organizational performance are more likely to exist (Martin, & Ernst, 2005). These interactions cannot lead to direction, commitment and alignment if the communication between people is ineffective.

Leadership theories started in the 1890’s with Sir Frances Galton’s Great Man theory. Since then there have been many other leadership theorists from Stoghill in the 1940’s, Blake and Mouton in the early 1970’s, Hersey and Blanchard in the 1970’s, Burns in the late 1970’s, Bass in the 1980’s, Kouzes, Posner, and Bennis in the 1990’s. All have contributed to how we think of leadership today. For the purpose of this study I
have focused on Burns’ theory of transformational leadership, Kouzes and Posner’s practices of exemplary leaders theory, and House’s path-goal theory.

Silverthorne (2001) explains “The path-goal theory developed by House (1971) and revised over the next several years (e.g. House, 1999), argues that leaders can adjust their own behaviors to adapt to contingencies and in this way find the most suitable leadership style for any particular situation. The theory states that the main goal of the leader is to help subordinates attain the subordinates’ goals effectively, and to provide them with the necessary direction and support to achieve their own goals as well as those of the organization” (p. 151). The path-goal theory proposes four different kinds of leadership styles. These styles include directive, supportive, participative and achievement-oriented (Silverthorne, 2001). Directive leaders tell subordinates what is expected of them and give specific guidance and enforce rules and procedures. The supportive leader likes a friendly environment and gives strong attention to the needs and well being of his or her subordinates in the decision-making process. Finally, the achievement-oriented leader seeks to improve performance, sets high standards, and shows confidence that his or her subordinates will achieve these standards (Prasad, 1990). The style a leader chooses should depend on the nature of the task and the needs of the subordinates (Silverthorne, 2001).

Transformational leadership is another theory about leadership behavior developed by Burns. Burns (1978) has defined transformational leadership as a managerial capability that “raises the level of human conduct and ethical aspiration of both the leader and the led, and thus it has a transforming effect on both” (p. 20).
Transformational leadership is also described in terms of the leader’s effect on the followers. Leaders transform followers by making them more aware of the value of outcomes, inducing them to transcend their own self-interest for the sake of the organization, and activating their higher order needs (Burns, 1978). Transformational leaders change their followers’ attitudes, values and beliefs to align them with those of the organization and steer their followers towards self-development and greater than expected accomplishments (Bass, 1998).

Kouzes and Posner developed the five practices of exemplary leaders theory and its assessment framework entitled LPI, which included five categories of 30 leader behaviors that enable leaders to get extraordinary things done (Kouzes & Posner, 1987). The LPI principles are similar in theory to transformational leadership, but Kouzes and Posner refer to transformational leadership as a style of commitment, however, the LPI construct is appropriate for its analysis (Bass, 1998; Bass and Stogdill, 1990). The five meta-categories of the LPI model are listed with a description. The first factor is challenging the process which means that leaders are people who search for opportunities to do things better. They experiment and take sensible risks to improve the organization. The second factor is inspiring a shared vision which means that a leader is someone who can construct a future vision and build follower support for this vision (Kouzes & Posner, 1987). In order for this vision to be carried out it needs to be communicated effectively. There are mixed feelings about the communication at the Jewish Home of Rochester.

“While some staff did commend the communication skills of their individual supervisors and managers, it seems that many respondents, including the managers and supervisors
themselves, also believe that communications between departments, within teams, and between senior management and the rest of the organization, could all be improved” (Silver, 2005, p. 6).

The third factor is enabling others to act which means a leader can foster collaboration among followers and support followers in their personal development. When an individual is not cooperative or carrying his or her weight on the team the employee needs to be addressed. This issue was uncovered at the Jewish Home of Rochester through focus groups held by Fulcrum Consulting. “There is also a perception that the supervisors and managers are often not effective at dealing with these marginal performers and do not hold them sufficiently accountable” (Silver, 2005, p. 6). “This includes getting individuals to cooperate and act as a team; getting teams in related departments to work together toward common goals; and getting people in general to ‘pull together’ to address challenges, staff shortages, and crises” (Silver, 2005, p. 7). “There are several possible consequences of this problem: first, standards of performance could decline over time; second, supervisors and managers could lose credibility and influence if they do not deal with the issue consistently; and third, in the long run, the Home could lose some of its reputation” (Silver, 2005, p. 6).

The fourth factor is modeling the way which says that a leader should set the example by one’s own behavior. A leader should focus on step-by-step accomplishments by followers, so that large-scale goals seem more realistic and attainable through a process of many “small wins”. Lastly, the fifth factor is encouraging the heart meaning that a leader is one who recognizes followers’ contributions and finds
ways to celebrate followers’ achievements (Sashkin & Sashkin, 2003). “A number of the focus group participants at the Jewish Home of Rochester suggested that, given all the changes that have occurred, and all the additional work that is being done, that it would be nice if supervisors and managers could say ‘thanks’ more often. Apparently, many do not get much in the way of praise or recognition and often only hear from their managers when there is something wrong” (Silver, 2005).

A leader’s character can affect the entire organization. The way a group approaches a new problem or project is a reflection of someone’s individual values. Those individuals who prevail, who can influence the group to adopt a certain approach to the problem, will later be identified as “leaders” or founders (Schein, 1984). Leadership must not only insure the invention of new and better solutions, but must also provide some security to help the group tolerate the anxiety of giving up old, stable responses, while new ones are learned and tested (Schein, 1984). A leader is the person who sets the tone and direction for the organization but the leader needs to be aware his or her values won’t become part of the culture until employees test it out themselves.

Training

Training is a planned effort by a company to facilitate employees’ learning of job-related competencies. These competencies include knowledge, skills or behaviors that are critical for successful job performance (Noe, 1999). Planned learning can be applied to a range of education and training interventions and events in an organization. Its value can be directly measured through observable performance improvement of trainees in job contexts following the planned learning highlighting transfer of learning (Berardinelli,
Training and development, as defined by Swanson and Holton (2001), is a process of systematically developing work-related knowledge and expertise in people for the purpose of improving performance.

Fulcrum Consulting identified the need for leadership training at the Jewish Home of Rochester by holding focus groups with employees of the organization and interviewing members of senior management. In order to improve leadership skills in management at the Jewish Home of Rochester, Fulcrum Consulting held four half-day training sessions addressing the issues revealed by the focus groups, including: In the first training session management was taught how to create a Team Covenant. The Leadership Covenant “is a process of facilitated dialogue and negotiation designed to help a manager and his or her team reach agreements on how they will behave and work with each other. It provides a forum for communicating expectations, constructive feedback, and discussing how to keep relations on track in the future” (Silver, 2005).

Another leadership tool that was taught in the first training session is Bridge Building. Bridge Building can be thought of as “facilitated forums to help employees and senior management have better communication, two-way feedback and trust” (Silver, 2005). In the second training session ways of improving communication skills were discussed. Techniques of running a meeting were taught for better organization and effectiveness. Group behaviors were reviewed for management to have a better understanding of how to get better results from meetings. “Through such processes as Bridge-Building sessions, Team Covenants, 360 degree feedback, Town Hall meetings, focus groups, skip-level interviews, roundtables, etc., organizations can better monitor morale, strengthen the
relationship and trust between the front line and the senior levels, and importantly, benefit from useful feedback and suggestions” (Silver, 2005). In the third training session management was taught ways of handling conflict in the workplace as well as the GROW model and how to be an effective coach. The GROW model looks at how management can set goals with their employees, look at the current reality of the situation, review different options, and analyze what should happen next. “Reviewing such skills as providing helpful coaching; feedback and performance review; facilitation of groups and running effective meetings; modeling the right attitudes; empowering/delegating to build competence and confidence; motivation of staff, etc. would all be helpful” (Silver, 2005).

The leaders of the Jewish Home of Rochester are challenging the process and searching for ways to do things better by seeking the leadership training to improve their skills and gain useful management tools. Effective communication is essential to inspiring a shared vision and having follower support. The facilitation skills taught in training show participants how to run more effective meetings in order to better communicate ideas. Leaders can enable others to act with the GROW model taught in training. By setting goals, looking at the current reality, knowing what options are available and what step to take next, leaders can help followers develop personally and professionally. An example of how leaders are being taught to model the way is by learning how to use a covenant to set expectations of both the leader and followers. Teamwork can be improved by understanding these expectations.
Evaluation

Unfortunately, training programs like the one for the Jewish Home of Rochester are often poorly evaluated. It is all too common for organizations to implement training programs with little or no evaluation. For those who do, very few actually measure the information that helps them to determine the overall effectiveness of the evaluation.

Proper evaluation should question the organizational impact of a training program. "Organizations are recognizing both the importance of training in improving performance and productivity and the significant investments of time and money that are being devoted to employee training. Organization decision-makers and training professionals want to be sure that training is accomplishing the intended purposes while using resources as efficiently as possible" (Pershing and Pershing, 2001). "Evaluation begins with a clear identification of the purpose or results expected from the training program. By focusing on the purpose and results, evaluators are guided to the reasons that the training program has been developed and the changes and improvements in learner performance that should result from training" (Berardinelli, 2003 p.6).

"Historically, if evaluation of training occurred at all, it was usually done in one of two ways. One method was simply to count the number of training classes and the numbers of trainees completing those classes. The implied assumption was that if employees participated in training, their performance would improve. The second method was to ask participants their perceptions of the training program at the end of training. Participants were usually asked questions about program characteristics, instructional effectiveness, and their feelings about the relevance and results of the
program. Again, the assumption behind this type of evaluation was that if trainees were satisfied with the training, it was effective” (Berardinelli, 2003 p.6)

“There are apparent faults with the logic behind each of the methods of evaluation described. The only reasonable connection between the number of trainees and training effectiveness is that an organization may stop sending employees to training if it appears that trainee performance has not improved after program completion. However, it would take some time and consistently poor training to see that result. Factors other than the quality of training can also affect whether trainees attend a specific training program or not. Using the second method of surveying participant perception to judge the quality of training suggests that learning only occurs when learners are satisfied with most aspects of the experience. While learner interest and motivation are certainly factors in outcomes of training, there is not a direct relationship between the learner’s perception of training and actual learning, especially at the time when the learner has just completed the training experience” (Combs and falletta, 2000; Green, 2001; O’Driscoll, 1998).

Kirkpatrick’s Four Levels of Evaluation

Donald Kirkpatrick is generally credited with developing one key conceptual model for training evaluation. His model, which has been widely adopted since 1960, remains a convenient and easily understandable way to think about evaluation in general. Kirkpatrick’s model describes four levels of evaluation: participant reaction, participant learning, participant on-the-job behavior, and organizational results (Rothwell, 2005).

The participant reaction level of Kirkpatrick’s model evaluates how the participant felt about the training program. As the word reaction implies, evaluation on
this level measures how those who participate in the program react to it (Kirkpatrick, 2006). It's a measure of customer satisfaction. Participant reaction is commonly obtained at the end of the workshop by using questionnaires. According to Kirkpatrick (2006) "Measuring reaction is important for several reasons. First, it gives us valuable feedback that helps us to evaluate the program as well as comments and suggestions for improving future programs. Second, it tells trainees that the trainers are there to help them do their job better and that they need feedback to determine how effective they are" (p. 27). Kirkpatrick believes that you cannot bypass the first level because if participants do not react favorably, they will not be motivated to learn.

Participant learning is the second level of the Kirkpatrick model and is defined as the "extent to which participants change attitudes, improve knowledge and/or increase skill as a result of attending the program" (Nelson, 1999). It is important to measure learning because no change in behavior can be expected until learning occurs. Learning has taken place when one or more of the following occurs: Attitudes are changed. Knowledge is increased. Skill is improved. One or more of these changes must take place if a change in behavior is to occur (Kirkpatrick, 2006).

Participant on-the-job behavior is the third level of the Kirkpatrick model. Behavior can be defined as the extent to which change in behavior has occurred because the participant attended the training program (Kirkpatrick, 2006). In order for change to occur, four conditions are necessary. The person must have a desire to change, the person must know what to do and how to do it, the person must work in the right climate and the person must be rewarded for changing (Kirkpatrick, 2006). Evaluation of
behavior is somewhat easier if the measurement is established as part of the program, for example, a tracking report or checklist not to be done independently of the program (Nelson, 1999). Strong, consistent coaching from supervisors and managers is the key to bridging the chasm that exists between learning and behavior (Kirkpatrick, 2005). Transferring learning to behavior has everything to do with the fundamental saying, “What gets measured, gets done” (Kirkpatrick, 2005).

Organizational results is the final level of the Kirkpatrick model. Results can be defined as the final results that occurred because the participants attended the program (Kirkpatrick, 2006). This level focuses on the impact the behaviors have on performance (Nelson). Measurement of results has broadened to include indirect benefits such as opportunity cost savings, increase in performance capacity, customer satisfaction, improved safety, and decreased turnover (Nelson, 1999). It is proposed that the organizational impact of systematic performance improvement resulting from training and therefore the recognized organizational value of training is more evident with a refinement of the space between the levels 3 and 4 of the traditional training evaluation model (Kirkpatrick, 1998).

“Training evaluation should be viewed in a context that is a part of effective training design and as a basis for improved organizational decision-making about human performance improvement and resource utilization. That suggests that the context for evaluation must first and foremost focus on the qualities of effective training. It does very little good to evaluate any product or process if we know in advance the design is flawed” (O’Driscoll, 1998; Sargue and Fuller, 1999; Vella et al., 1998).
CHAPTER THREE
Design

Due to the short-term nature of this project, I was only able to measure the first three levels of Kirkpatrick’s model. To measure the first level of Kirkpatrick’s model I used a participant reaction survey sheet developed by Fulcrum Consulting to capture the initial reaction of participants in the training. Based on Kirkpatrick’s model for evaluation I formulated a questionnaire for the focus group participants whom I would be evaluating. The questionnaire consisted of eight questions designed specifically for this project to determine if what was taught in the leadership development program reached the second and third levels of Kirkpatrick’s model. I held two focus group sessions to have senior management who went through the training as well as a sample of the direct reports to the management complete these questionnaires.

Participants

The participants of this study were chosen at random by the Vice President of Human Resources. Two sessions of focus groups were held the first on December 27th 2005 and the second on February 2nd 2006. The first session was held shortly after the last leadership training session. The first session held in December consisted of a group of six line staff who are some of the direct reports to management who completed the training. Participants varied in ages from mid 20’s to mid 30’s. Most of these participants were from the environmental services department. Two of the participants spoke very little English and could not completely fill out the questionnaires.
The second group of line staff in December consisted of four employees with ages ranging from 18 to mid 40's. Most of these employees were from the nursing departments and the kitchen.

I also met with a management group in December. This group of participants consisted of seven managers who completed the leadership development training. These employees represented several different departments. Their ages varied from mid 30's to mid 50's. The focus groups held on February 2nd consisted of the same participants from the December session with the addition of one new employee to the management group. This participant was unable to attend the focus group in December but joined the February session.

Measures

The first three of Kirkpatrick’s four level evaluation model was used as the basis of the design for evaluating the organizational impact of the leadership program implemented at the Jewish Home of Rochester. The first level of Kirkpatrick’s model is reaction, which examines how participants felt about the training. To measure the first level Fulleran Consulting designed a quantitative survey (See Appendix A) that participants completed immediately after each session of training. The survey consisted of questions to gather information pertaining to how the participant felt about particular elements of the training. These elements included workshop content, workshop materials, the learning environment, application of what was learned, workshop instructor and overall satisfaction. Participants were asked to rate each of these elements on a scale
from one to five where a one indicated negative feelings while a five indicated positive feelings.

The second level of Kirkpatrick’s model is learning which evaluates if a change in attitude, skills or knowledge has occurred. It was measured using information gathered during the two focus group sessions and from a questionnaire I created to ask questions pertaining to this level of evaluation (See Appendix E). The questionnaire consisted of questions to explore these areas with the senior management who attended the leadership training workshops. Questions pertaining to the attitude and achievement-oriented leader behaviors of management were questions one and four. This included the leadership behavior of how management modeled the way by recognizing daily accomplishments and encouraging the heart of followers by noticing their achievements. For example, one question asked if leadership has given recognition or praise to an employee for doing good work while another question asked if management feels they encourage their employee’s professional development. Both of these leadership skills were taught in the workshops.

The next set of questions sought to identify how management inspired a shared vision and communicate to employees. These questions were asked to see if management used a participative leadership approach. Questions 2, 3, 5 and 7 asked about the skills learned in the leadership development workshop. Specifically, Question 2 asked if management has implemented a covenant with their team. Question 3 asked if management thinks communication is effective between staff members. Question 5
asked if meetings are more effective. Finally, Question 7 asked management if they have used the GROW model taught in training.

The final question, Question 6, asked if there is consistency in the way employees follow policies and procedures. This was designed to determine whether there was a better overall knowledge of the policies and procedures. This question was asked to gain insight as to whether management is demonstrating a directive leader approach and providing structure to employees. This question also helped to determine whether management is challenging the process, looking for ways to do things better and setting a direction for employees to follow.

The third level of Kirkpatrick’s model tests whether there was behavior change in participant’s through examining changes in manager behavior that were perceived by others. Specifically, I met with two groups of direct reports to the management who attended the leadership training workshop. The questions were designed to explore if line staff has noticed behavior changes in their management. Four questions asked line staff about the attitude of their management and if management is taking a participative role with employees. Question one asked if line staff have received recognition or praise for doing good work. Question two asks if line staff feels that their work is valued by their managers. Question four asks if line staff think management encourages the professional development of individuals. Question seven asks if line staff feel management is approachable. Question three looks at communication skills and asks line staff if they feel it is effective. Questions five and six pertain to the knowledge of coworkers. These
ask if there is consistency in following policies and procedures and if line staff feels their
coworkers are committed to doing quality work.

Procedures

I met with the senior management during the first focus group session at the
Jewish Home of Rochester to see if the ideas, and skills taught in the leadership
development workshop were actually being practiced on the job. This session was held
in a small, poorly ventilated meeting room at the Jewish Home of Rochester on a
Thursday afternoon. I sat at the head of the table and asked the participants to fill out the
questionnaires as honestly and as detailed as possible. Once the questionnaires were
completed by all participants I reviewed each question with the group and asked people
to share their thoughts to start a conversation. I also asked questions during the focus
groups to elaborate on key points. I took notes on what was being discussed for each
question. Using the questionnaires for anonymous responses, I gathered information that
led me to see how the leadership skills taught were being used.

The second session of focus groups held with senior management reviewed if any
of the skills or ideas taught were being used a month later. This session was held in a
large conference room at the Jewish Home of Rochester on a Thursday afternoon. I again
had participants fill out the questionnaires and then facilitated a conversation that
centered on the topic of change. I reviewed each question with the group and asked if
they had noticed a change in a way they were managing. I used the same questionnaire
as in the first session and also asked questions to elaborate on key issues mentioned.
I met with the line staff to gather information pertaining to their view of management’s behavior. The first session was held in a small, poorly ventilated meeting room at the Jewish Home of Rochester on a Thursday afternoon. I sat at the head of the table and asked participants to fill out the questionnaires and then reviewed each question verbally after the questionnaires were completed. The second line staff session was held in a large conference room at the Jewish Home of Rochester on a Thursday afternoon. During the second focus group session with line staff I sat at the head of the table and asked participants to answer the questionnaires and facilitated a conversation when the questionnaires were completed. During the conversation I asked questions regarding any changes in management behavior. When reviewing each question I asked participants to think back over the past month to remember any differences in the way management handled daily activities, meetings, or conflict resolution. After reviewing the questionnaires I looked for common themes among the responses and compared the management’s answers to the line staffs.
CHAPTER 4
Results

Tables 1-6 detail the results of the quantitative data gathered from the initial evaluations of participant reactions to the leadership training, which is the first level in Kirkpatrick's evaluation model. The quantitative data gathered only portrays the participant's feelings from the first three sessions of training that took place in the months of September, October, and November. The results for the last session held in December were unattainable from the Jewish Home of Rochester.

The reaction from each session was generally positive. The majority of people rated the content, materials, learning environment, application of what was learned, and facilitator highly. For example, the average percentage of participants who felt that the workshop content was very relevant for all three sessions was 80%. Similarly, the average percentage of participants who felt that the workshop materials were appropriate was 83%. The average percentage of participants who felt the learning environment helped to enhance their learning was 70%, which, though still quite high, was the lowest of all ratings. Finally, the average percentage of participants who felt that what they learned could definitively be applied to their work was 81%, the average percentage of participants who felt the workshop facilitator was highly effective was 82%, and the average percentage of participants who rated their overall satisfaction for each session as being high for all three sessions was 78%.

The second level of Kirkpatrick's model is learning, which evaluates if there is a change in attitude, knowledge or skills. To gather this information two focus groups
were held, one immediately following the leadership training and a second a month later. The first group I will discuss is the management group. The responses to the questions asked regarding if leadership skills taught in the training were actually used were positive.

The management who completed the leadership training discussed having more organization to their meetings and having an objective as well as an agenda. Three out of seven managers in the first focus group had implemented a covenant with their staff. A manager said “Covenant was useful so we are all in agreement and have the same expectations.” Another manager said “Covenant was a learning tool. It gave a better understanding as to the staff’s feelings.”

In the second focus group session held with managers, an additional manager had implemented a covenant with staff. The remainder of the managers discussed that they found the covenant to be a good idea but did not yet have the time to implement one.

When asked about the GROW model taught in training, the majority of management agreed that it was a useful tool that has been practiced since the leadership training. A manager said “The GROW model helped identify ownership of the problem when used with an employee who was not getting along with another employee.”

Another topic that was discussed in the focus groups with the managers who completed the leadership training was communication. Unfortunately, managers felt that they had not improved in this area when I met with them in February of 2006. Instead, the majority of the group felt that people do not communicate to others effectively. For example, a manager said “There are times when we do not receive information on certain
things and when asked about it we look like fools.” Some people mentioned that communication within separate departments is improving, yet organization wide there is still an issue of everyone not having access to the same information. “Policies change and there is no communication to all the staff.”

The third level of Kirkpatrick’s model evaluates if the behavior of the people who completed the training has changed. To gather this information I met with line staff who are the direct reports to the management that completed the leadership training. During both focus group sessions, line staff discussed that they did notice a change in the way meetings were conducted and acknowledged the use of the covenant. Questions asked regarding the recognition and employee development were consistently answered positively. Employees feel that they are acknowledged when they go “above and beyond” what is expected of them. Employees feel valued by management showing confidence in their ability to be productive without constant supervision. Employee development is something that is appreciated by line staff. For example, an employee said that “We are encouraged to attend continuing education courses.” Another employee mentioned that “I’m given projects to expand my knowledge of new aspects of the job.” In fact, nine out of ten employees asked said that they receive feedback from their manager regularly.

When line staff was asked about consistency and quality of the work done at the Jewish Home of Rochester there were mixed feelings. They positively responded that employees take pride in the quality of their work and there is a solid sense of teamwork. For example, an employee said that “My coworkers in my unit work together to make the
residents as comfortable as possible and to also help the family be happy.” Employees show respect to the resident’s special needs. Although employees clearly take pride in their work, there is, however, concern over the consistency of employees being disciplined. Some line staff talked about how it does not seem as though management is aware of all the policies and consequences for line staff not following rules are based on how someone feels about another. It was said that employees are “Not consistently disciplined when there is a problem.”
CHAPTER 5

Recommendations

Based on the results of the focus groups and questionnaires, leadership has improved at the Jewish Home of Rochester. However, there is still room for improvement in areas such as communication and consistency in following organizational policies.

Improvements Resulting from Training

Managers who attended the leadership training have learned useful skills such as more organization in meetings, building a covenant with employees, using the GROW model for coaching and providing feedback. Using the techniques for facilitating meetings in a more organized fashion has helped managers at the Jewish Home of Rochester to communicate their ideas and vision to staff more effectively. This has helped management become more directive leaders by providing structure. By implementing a covenant with staff, managers and employees have a better understanding of what is expected of one another. This has helped managers to enable their employees to act and to foster collaboration. When managers use the GROW model they are becoming a participative leader and encouraging their employees by coaching.

Management has learned the value of providing feedback to employees regularly and this has helped managers to become achievement-oriented leaders by recognizing a job well done as well as weak performance.

Areas for Further Development

Clearly an area of focus for continued developmental opportunities for the Jewish Home of Rochester is communication. While the importance of communication and
ways to communicate more effectively were taught in the leadership training there seems to still be an issue of poor communication between departments. This may not be a reflection of leadership as much as an issue that needs addressing organization wide. This could show that management is not challenging the process to find a way to communicate better. As mentioned by a number of line staff in focus groups the need for employees to be disciplined consistently is necessary for leaders to be directive and to set the example for others to follow.

Limitations

As with any research study there are strengths and limitations in the design of this project. The information gathered by participants remained anonymous allowing people to be as open and honest as possible. The focus groups were approximately 30 minutes and while it was sufficient time for participants to answer the questionnaires and give opinions it did not take an inordinate amount of time from the participant’s daily routine. The evaluation of this leadership training was based on a well known and widely used model using Kirkpatrick’s four levels (cite). This gives the evaluation more credibility. However, some of the limitations to this project included not having a control group to measure the behavior of participants after the leadership training as well as not testing management on leadership skills prior to the leadership development program. Also, it is difficult to determine when a change in behavior will occur. Some of the management in the focus groups mentioned being overwhelmed with work at this time but will eventually use some of the tools taught in the training.
Recommendations

Leaders influence the performance of followers and therefore impact the entire organization’s productivity and morale. In order for the leader’s influence to be positive, it is important to continuously develop the attitude, knowledge and skills of these leaders. Using an outside consultant to identify the needs of the organization and implement a customized training program is recommended. It is also recommended to have an experienced human resource professional evaluate the training program’s impact regularly to determine if more training is needed or if an intervention of a different type is needed in the future.

Communication and consistency with management following policies are the main problems still facing the Jewish Home of Rochester. These two issues go hand in hand. If policies are not communicated clearly to everyone then it will be difficult for everyone to understand the policies. To address this, it is recommended that management use the leadership skills taught in training to review the expectations of one another and to look for ways to improve the current situation. Using the meeting facilitation skills taught in the leadership training, it is suggested that a meeting be held to review policies and procedures with all management. Once that has occurred it can be determined how management will be held accountable for applying the same rules and disciplinary action to an employee who does not follow these policies and procedures. To help improve communication between departments I recommend creating a newsletter that can be distributed to every employee on a monthly basis to inform people of events, promotions, policy changes and other organizational information that employees need. Also,
investing in resources such as more computers for internet and email access could help improve the communication between managers and then pay for itself in the long run.

I also recommend human resource professionals to tailor a leadership training program to the organization in which you are implementing the training. It is also suggested that the training focus on only a few aspects of leadership at a time. An example would be to cover one or two topics and then evaluate. Once the first two topics or skills are mastered, hold another training session covering a few topics and evaluate again.

Because I was surveying and interviewing employees, I was unable to evaluate the fourth level of Kirkpatrick’s model, which emphasizes organizational results. An area for human resource professionals to explore would be examine and evaluate the training program using information that tests the fourth level of Kirkpatrick’s evaluation model, such as changes in turnover data.

Overall Conclusion

This project sought to identify how a leadership training program impacted the Jewish Home of Rochester. The leadership training for managers at the Jewish Home of Rochester is successful, as tested by levels one, two, and three of Kirkpatrick’s model. This was accomplished by training participants learning new attitudes, skills, and knowledge of leadership behaviors and then demonstrating subsequent behavior change.on-the-job that impacted trainee’s direct reports.

Even though this training was successful, it is also important to understand that training is not a solution to solving all problems within an organization. If the
participants of the training program do not transfer what is learned to the job the
problems still remain. That is why it is necessary to evaluate training programs and
measure if learning has occurred. It is difficult to determine however when the behavior
changes in participants will take place; therefore the impact of training should be
reviewed continuously.
Appendix A

Michelle Bendavine
3690 East Ave.
Rochester, NY 14618
November 28, 2005

Jewish Home of Rochester
2021 Winton Road South
Rochester, NY 14618

Dear Participant:

As you may be aware Jewish Home of Rochester has contracted with Fulcrum Consulting Inc. to assist in further developing the leadership skills of the managers. The focus group has been designed to assist in determining if the training has been effective at improving leadership skills and increasing overall employee satisfaction.

You have been chosen at random to be a participant in the following study of addressing the training programs being offered at the Jewish Home of Rochester. You are being asked to participate in a focus group on two separate occasions – once in December and then again in January.

Please keep in mind that all of the responses will be kept confidential. The identification number on the top of your questionnaire will be used strictly for the purpose of comparing initial responses to the responses at the end of the training. The individual responses will never be revealed to anyone within the Jewish Home of Rochester. Your results will used for the sole purpose of determining the effects of the leadership training for managers and employees.

Your participation implies consent and is greatly appreciated by the researcher and the organization. Your responses will be of great assistance in determining the impact of training.

Thank you,

Michelle Bendavine
Appendix B

Consent Form
Impact of Training – 590 GHRD
St. John Fisher College

Study of the Effectiveness of the training program at the Jewish Home of Rochester

1. What is the aim of the study? The aim of the study is to determine if the training that being done by Fulcrum Consulting Inc. is effective at training upper level management in the three components outlined: 1. You as a Professional, 2. You and your team, and 3. You and the Organization.

2. How was I chosen? Your name was chosen through stratified random sampling.

3. What will be involved in participating? Two 45 minute focus groups with 8 participants. The focus group will meet once in November and once in January.

4. Who will know what I say? Your name will be kept confidential, but you responses will be shared with other employees at the Jewish Home of Rochester, as well as the students and friends who attend colloquium at St. John Fisher College at the end of the Graduate Human Resource Development Program. The identification number at the top of the questionnaire will be solely utilized for comparison purposes.

5. What are my rights as a respondent? You have the right at any time to decline participating in the focus groups. It is also within your right to indicate to the facilitator any portion of the focus that you do not want to be shared with other people at the Jewish Home of Rochester or the students and friends who attend colloquium at St. John Fisher College.

6. If I want more information, whom can I contact about the study? For further information you may contact Michelle Bendavine at mbendavine@yahoo.com

Michelle Bendavine – Interviewer
Respondent
Date
Appendix C (created by Fulcrum Consulting, Inc.)

WORKSHOP EVALUATION
Jewish Home of Rochester

Name of Program:  
JHR Leadership Series 2005: PROGRAM 1
The Manager's Role

Date of Session:  
September 7 ______  September 16 ______

Part A provides a Quantitative Assessment, and Part B gives you the opportunity for Qualitative feedback.

Part A Quantitative Evaluation:
Please circle the number on the 1-5 scale (where 1 = poor, and 5 = excellent) that best represents your assessment of the various elements related to the training program.

1. Workshop Content:

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<td>Partially relevant, somewhat met my expectations</td>
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Comments on this element (optional):

4. **Application:**

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Comments on this element (optional):

5. **Workshop Instructor/Facilitator:**

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Comments on this element (optional):

6. **Overall Satisfaction with Workshop:**

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Comments on this element (optional):
Part B Qualitative Evaluation:

1. Please indicate a few important issues or topics the workshop has clarified for you as a Supervisor or Manager, which will help you to do your job more effectively:
   A. 
   B. 
   C. 

2. What were a few features about this workshop that you especially liked and enjoyed?
   A. 
   B. 
   C. 

3. Do you have any comments or suggestions that you would like to share with the seminar facilitators which you believe would help improve future sessions?
   A. 
   B. 
   C. 

4. Do you have any questions you would like to ask, or feedback you would like to offer to:
   A. Senior Management, or the HR Team, who sponsored the session
   B. The Workshop Leaders
Appendix D

Line Staff Focus Group Questions

1. In the past seven days have you received recognition or praise for doing good work?


2. Do you feel that the work you do at the Jewish Home of Rochester is valued by your manager or supervisor? Why or why not? Please give specific examples.


3. Do you feel that communication between staff members at the Jewish Home of Rochester is effective?


4. Do you feel that your supervisors encourage your professional development?


5. Do you feel that your coworkers are committed to doing quality work? Explain.


6. Do you feel that there is consistency with the way employees follow policies and procedures?

7. Do you feel that you are able to approach management with concerns or issues that may arise?

8. What are the three best characteristics about the Jewish Home of Rochester?

The three worst characteristics?
Appendix E

Management Focus Group Questions

8. In the past seven days have you given recognition or praise to an employee for doing good work?

___________________________________________________________________________

___________________________________________________________________________

9. Have you implemented a covenant with your team? Why or why not?

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

10. Do you feel that communication between staff members at the Jewish Home of Rochester is effective?

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

11. Do you feel that you encourage your employee’s professional development?

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

12. Have your employee meetings been more effective since the leadership training you received? Please explain.

___________________________________________________________________________
13. Do you feel that there is consistency with the way employees follow policies and procedures?

14. Have you used the GROW model taught to you in the leadership training? If so, give details.

15. What are the three best characteristics about the Jewish Home of Rochester?

The three worst characteristics?
Table 1. Frequency and Percent of Participant Ratings of Workshop Content as a Function of Month of Participation

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Table 3. Frequency and Percent of Participant Ratings of Workshop Learning

Environment as a Function of Month of Participation

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Table 5. Frequency and Percent of Participant Ratings of Workshop Facilitator as a Function of Month of Participation

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Table 6. Frequency and Percent of Participant Ratings of Overall Satisfaction as a Function of Month of Participation

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References


Information retrieved November 21, 2005 from www.jewishhomeroch.org