

2009

FIELD TRAINER'S GUIDE

Field Trainer's Guide for the Tools for Excellence for Supervisors and Managers in Child Welfare

**UCDAVIS
EXTENSION**

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2009

Field Trainer's Guide for Both the Tools for Excellence for
Supervisors and Managers in Child Welfare

Tools For
Excellence

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Introduction

It's hard to overstate the impact that supervisors have on the staff who report to them. Not only do supervisors influence how well social workers understand and perform their jobs, but they can also influence whether staff remain at their jobs. Research shows a clear relationship between turnover and supervision, and in the field of child welfare, this is particularly true.

To balance the changing needs of families with the ongoing needs of staff, child welfare supervisors must acquire new skills and implement solution-focused supervision strategies in order to achieve organizational excellence. The New Tools for Supervisory Excellence program will help supervisors further support and develop workers' clinical competence and promote a change from "compliance" to "professional decision making."

The strength of the New Tools for Supervisory Excellence program is increased by the position entitled "field trainer." Each supervisor in the program will be assigned a field trainer who will serve as a mentor/coach to assist in applying new information and skills that are acquired in learning labs. This guide's purpose is to enhance the quality of the field trainer's work by providing some tools for building the relationship and providing on-going assistance to the supervisor with whom s/he is working.

Objective and Design Principles

We adopted an approach called cultural consensus^{1*} in the development of the topic areas and focus of work in the “Tools for Excellence” program. Promoting family engagement and family participation in child welfare are key to families making lasting change and improving the family’s outcomes. We looked for a similar approach to support the concept of parallel process for supervisors.

The unique approach involved in this project allows the supervisors to determine their own knowledge and skill needs and allows the supervisors to shape the curriculum presented in the learning labs. The literature review revealed a lack of knowledge among professionals regarding the special needs of child welfare supervisors. Child welfare supervisors have expressed that previous training experiences on the topic of supervision have not been what they needed. It was determined that the supervisors would be involved from the beginning of the project, and throughout the life of the project, in determining the instructional material and topics. The supervisors were asked to give input regarding strengths and weaknesses of every aspect of the lab.

Dialogic learning is at the heart of the learning lab design. The labs are being created through a participatory democracy. Brookfield (2002) discussed Erich Fromm’s ideas regarding conditions and dispositions for dialogic learning. Brookfield (2002) stated that adult learners help each other learn because they regard their peer’s learning as crucial to their own development. Brookfield quoted Fromm:

They respond spontaneously and productively; they forget about themselves, about the knowledge, the positions they have. Their egos do not stand in their own way...they carefully respond to the other person and that person’s ideas. They give birth to new ideas because they are not holding on to anything. (1976)

Brookfield (2002) stated that what is true for the democratic experiment is true for the adult classroom. Brookfield proposed that the degree of democracy in the adult classroom is measured by the amount of influence the adults have on the situation in which they find themselves. Brookfield also stated that when hard-fought decisions emerge from true

¹ *The cultural consensus model (Romney, Weller, & Batchelder, 1986) will be used to determine curriculum needs. This model is a systematic ethnographic technique that cognitively maps what the organizational culture is and provides a method to measure change in organizations. The model has three underlying propositions. Individuals will have shared values and behaviors to the extent that they share agreement regarding culture. Cultural competence is reflected in the individual’s knowledge of the culture, its domains and the degree to which an individual behaves and thinks accordingly. The final proposition is that there is a culturally correct response that is derived from the shared culture. This model allows evaluation of the degree to which there is consensus regarding the culture. It also estimates the content that is shared and each individual’s cultural competence.*

dialogue, adult learners need to know that their decisions will have some affect or they will not bother to participate. Learning must be meaningful and useful for the adult learner. The adult learners in the child welfare supervisor learning labs will have an affect on the curriculum and the design of the model. Each supervisor will determine how the information presented and discussed will be used in each workplace. It is the belief of the advisory committee that new ideas will spring from dialogic learning. It is also the belief of the advisory committee that the supervisors will actively participate and try new ideas in the workplace when they have been the originators of the ideas.

The learning labs are designed to promote life-long learning and establish intrinsic motivation to learn and self-educate. Tannenbaum (1997) used several studies to conclude that individuals may attend training, but their work environment will determine whether or not the new learning results in changed behavior. Tannenbaum also stated that the culture needs to be one in which individuals who apply new ideas and skills are recognized and rewarded for their changed behavior. The learning labs are designed to promote new ideas and skills that will be tried in the workplace and to promote supervisory use of outcome measurement related to the supervisor's new practices. The design of the labs is that learning lab leaders will reward and recognize applied knowledge and skills, and peers in the supervisory groups will support each other and supply recognition for application of what is learned. The determination of resulting outcomes will promote empirically based practice. Throughout the learning lab experience, supervisors will also be exposed to studies that discuss supervisory practices that have been empirically proven to produce positive results.

In this first pilot, distance learning/web-based learning was not used. However, because many of the supervisors are isolated and need connection with their peers to support their growth, in the next generation of the program, we will consider using a web site to offer a discussion board, practice exercises and supportive chat functions. The overall goal of the design is to create an environment in child welfare agencies that promotes lifelong learning, self-education and recognition for application of ideas learned in training and other educational experiences.

Specific Design Elements and Flow

The program was structured around nine in-person learning lab sessions of two days each, held over a period of nine months. Learning Labs were structured to be interactive using current workplace examples and challenges as related to the identified topic. The field trainer focused on specific strategies for incorporating tools and models into the daily practice of the supervisor. Identified knowledge experts in the field facilitated learning and group dialogue.

One faculty person served as facilitator for all learning labs providing consistency and the ability to integrate all topic areas. This person, in partnership with a key university staff

person, also supported the logistics of the program. Logistics included coordination with field trainers and check-in calls, addressing challenges in the learning labs, supporting the communication with the managers of the supervisors in the program, assignments, homework and all other issues. It is important to note that the facilitator is key to the development of a safe, learning and sharing environment for all participants.

Materials provided to participants included pre-readings, theoretical models and descriptive content in power point, tools and templates for assessment, change planning, retention and knowledge management.

Components of the Program

- 1) A cultural consensus approach presented with the model to demonstrate the competencies needed for supervisors in the child welfare setting
- 2) Participating supervisors take part in learning labs over a 10 month period to provide ongoing training and skill development as they implement the casework supervision model with their case workers.
- 3) Field Trainers assigned to work with the supervisors to help them apply what they are learning
- 4) A 360 degree evaluation completed with an individual program development plan

Role and Responsibilities of the Field Trainers

The Program is fortunate to have field trainers with years of child welfare experience. They worked in Northern California and know the strengths and challenges of rural child welfare practice. The primary role of the field trainer is to provide insight, coaching, information and feedback on the skills and abilities of each supervisor in relationship to the topic of the learning lab. They work with the participant to develop his/her individual development plan based on the 360 degree evaluation, working with him/her over the ten months of the program to address the individual plan. The field trainers are requested, but not mandated, to attend the learning labs; this provides additional support for the transfer of learning and skill development.

Characteristics of field trainers

- Knowledgeable of child welfare practice
- Strong clinical understanding of casework
- Knowledge and skill in coaching for skill development
- Strong communication skills
- Ability to facilitate learning and create a positive learning environment

- Understanding of the transfer of learning concept

Field trainers are assigned a supervisor/manager based primarily on geography, given the driving distance in Northern California. The field trainer's first meeting is a joint meeting with the supervisor and the supervisor's program manager. The direction of the first meeting is to clarify roles, responsibilities and communication among field trainer, manager and supervisor. Agreements on how the field trainer and supervisor/manager would work together in the coming months, clarification of expectations and strategies for clarifying conflicts or communication were part of the initial meeting.

The field trainers' work with mentees needs to be. . .

- in-person meetings
- phone calls
- e-mails

To support the transfer of learning from the Learning Labs, Field trainers may participate in the following:

- unit meetings
- individual meetings with staff
- reviewing of data reports and statistics
- training the mentee in Safe Measures
- discussion of learning lab topics and develop, in partnership, strategies that might be effective for the individual mentee.

The Field Trainer's Tasks

The term "mentor" can have as many connotations as the word "friend." There is no one way to be a mentor nor one clear-cut role or task that defines mentorship. Staff should describe the variety of roles that a mentor may have, explaining that the role depends on the mentor's individual style combined with the needs of the mentee—needs which are constantly evolving during the relationship.

The field trainer's tasks may include the following:

- Becoming a source of general encouragement and support
- Training and reinforcement of the Learning Labs
- Coaching specific skills and behaviors that are needed to function successfully as a supervisor or manager

- Working with the mentee on his/her monthly Action Plan goals
- Evaluating and giving feedback regarding the mentee's observed performances
- Being a positive role model
- Serving as a confidant who will help the mentee solve problems and conflicts
- Guiding and inspiring the mentee in their Individual Professional Development Plan

The Role of the Participant's Supervisor

It is important that the participant's supervisor be included in the program. Participation by the supervisor is discussed at length later in this document. As a preview, the role of the supervisor within the mentoring relationship may include these activities:

- Meeting with the mentee and mentor early on to negotiate contact and confidentiality agreements and to identify the mentee's professional development needs
- Receiving brief progress reports and assessing the mentee's ongoing training needs
- Upholding confidentiality by not using the mentoring relationship as a way of "policing" the mentee
- Attending periodic Learning Labs and graduation.

Program Checklist for Field Trainers

Contact Facilitator, Program Director or Academy staff immediately if there are any concerns, issues or need for clarification

- Exchange contact information and share background experience in child welfare.
- Contact your mentee – schedule 1st face-to-face meeting with participant and his/her supervisor within the first month.
- Review goals, roles and responsibilities of each participant.
- Come to a consensus on how to address conflict.
- Review Individual Professional Development Plan (developed from the 360 degree evaluation).
- Clarify strategies to support the participant's professional development using his/her Action Plan goals and other resources.
- Set up schedule for checking in.
- Review expectations for mentor/mentee relationship.
- Record contacts with participant on contact log including day, amount of time, focus of contact.
- Review Action Plans from Learning Labs and Individual Professional Development Plan with participant on a monthly basis celebrating successes and supporting progress on goals.
- The monthly contact should average between 2 – 5 hours.
- Attend monthly conference calls that will be scheduled for regular check-ins with facilitators.

The overall goal and emphasis of the field trainer should be on the participant's professional development. This can be accomplished through actions plans, Professional Development Plans (360°) and Learning Labs.

While emotional support is import, the focus should be on impacting practice with the desired result of improving outcomes for children and families in Child Welfare.

Understanding the Concept of “Mentoring”

In his 1996 book, *The Kindness of Strangers*, author Marc Freeman professed the many wonders of mentoring and how it can be one answer to disconnection and isolation, but in the same book, he also warned about the danger that comes with the lack of a unified organizational effort when he used the phrase "fervor without infrastructure."

Mr. Freeman is correct. Although a successful mentoring program can provide extraordinary widespread benefits, to have a successful formal mentoring effort, it is necessary for both staff and decision-makers to fully comprehend the concept of “mentoring” and the rationale for creating a “formal mentoring program.”

Staff needs to be well informed so they can develop and implement the structure and operational procedures needed to run a quality mentoring program. In addition, before decision-makers offer to seek out the substantial resources and support necessary to run a successful program, they will need to understand what mentoring is as well as the benefits that a mentoring program can bring to mentors, mentees, the organization and the public being served.

Many people believe they know what "mentoring" is, and they may be on target. But very few understand what an actual formal "mentoring program" is, how it is designed, who runs it, what the benefits are and how to manage a successful endeavor. The truth is that a majority of mentoring programs fail, and the reason is their lack of adequate planning in the program design phase.

Mentoring programs aren't as successful if they are designed to be a stand-alone endeavor. A program should not only have a clear structure but it "...should be one component of a comprehensive system of people development. For sustained effectiveness, it must be carefully integrated with the other components of that system: training programs, performance appraisals, recruitment" (Murray, 1991).

Mentoring is more than “putting two people together.” Formal mentoring programs provide participants with a clear program structure as well as initial and ongoing staff support.

Definition of a Mentor

Throughout the ages, the term “mentor” has been used to describe a caring individual who forms a relationship with a less experienced person during a time in his/her life when s/he are facing challenges. The mentor is a source of guidance and experience in policy and practice for Child Welfare work.

A Mentor is also “other-centered”—his or her focus is on the growth and development of the Mentee.

"Often mentoring gets confused with coaching because one of the functions of a mentor is to coach the protégé or mentee, but whereas mentoring uses many of the same techniques as coaching, mentoring involves *going above and beyond*. It is a relationship in which you do more than train the employee to do his job well. Rather, your focus is to share your experience, wisdom and political savvy..." (Stone, 1999).

While a "coach" typically concentrates on a specific task, and the benefit is largely for the organization, a successful mentor is "other-centered." That is, a mentor makes a commitment to the mentee, and s/he understands that the focus of the match is always on the mentee's growth and development.

True mentoring is also "non-directive." Successful mentors teach their mentees the problem-solving process rather than merely tell them the answer to a particular problem. At times they may even allow their mentee to stumble while trying to accomplish a particular task so that the mentee may learn a valuable lesson.

Mentoring is about one person helping another to achieve something. More specifically, something that is important to the individual. It is about giving help and support in a non-threatening way, in a manner that the recipient will appreciate and value and that will empower that person to move forward with confidence toward what they want to achieve. Mentoring is also concerned with creating an informal environment in which one person can feel encouraged to discuss his/her needs and circumstances openly and in confidence with another person who is in a position to be of positive help to them.

Mentoring is an exclusive one-to-one relationship, is completely confidential and can be a useful complement to other staff development tools.

In the field of child welfare work, the lack of staffing at some agencies is presenting a continual crisis. Job burnout is widespread and agencies are seeking out innovative ways to recruit, train, support and retain quality child welfare workers and supervisors. Collins (1994) indicates that the results of mentoring among social workers are not well known, "Studies from the fields of business, education, organizational and developmental psychology have dominated the scholarly and professional literature and media on mentorship. In contrast, little is known about mentor and protégé relationships among social workers." However, its success in other fields indicates that the development of formal mentoring programs in child welfare work can be one strategy to help avert the crisis in recruitment, training and retention

Ellet (1999) champions mentoring as a way of diminishing social worker / child welfare worker turnover. "Mentoring includes on the job skills training, guidance and support when attempting assignments which are new to the employee, availability to answer questions, inclusion in the established office activities both formal and informal, use of role conflict for growth and understanding in the job... and in general making a genuine effort to make each employee know that he/she is valued and [supported in his/her professional development]" (p. 28).

Benefits of Mentoring

Mentee Benefits

Mentoring literature points out the following benefits that often result from the mentoring process: skill acquisition, leadership development, job satisfaction and worker retention (Dreher, & Ash, 1990; Fuller, Morrison, Jones, Bridger, & Brown, 1999; Kaminski, Kaufman, Graubarth, & Robbins, 2000). Other benefits are shown below:

- Providing a sense of care and support while reducing the feelings of isolation
- Teaching and reinforcing the Learning Labs
- Facilitating awareness of the organizational culture
- Facilitating and supports the Individual Professional Development Plan
- Strengthening organizational skills
- Advancing the ability to quickly respond to a variety of problems
- Improving self-confidence
- Facilitating an awareness of community and agency resources
- Enjoying the rewards inherent in a caring relationship

Mentor Benefits

- Understanding that participation will enhance the quality of care provided to the individuals and families
- Passing on the knowledge and skills of a ‘master practitioner’
- Receiving compensation and / or incentives (if any are given)
- Enjoying the rewards inherent in a caring relationship
- Experiencing the personal gratification that is obtained through the act of giving back to the profession

Organizational Benefits

- Improving the quality of care provided to individuals and families, and therefore improving outcomes
- Communicating organizational values
- Increasing organizational loyalty
- Improving agency communication
- Supporting the individual Professional Development of Supervisors and Managers
- Formulating, promulgating and reinforcing new ideas and “promising practices” through the mentoring process
- Creating another venue for the development of leadership
- Improving the overall productivity for employees

Positive and Negative Results

Although the concept of employee-to-employee mentoring is becoming more accepted year by year, implementation of these programs has had mixed results. One mentoring program may be a shining success but another can be a stunning failure. Let's not forget the earlier mentioned warning, "fervor without infrastructure." (Freeman, 1996)

The key to having a successful program is to understand that quality programs need substantial resources, careful planning in the design phase and follow-through during program implementation in order for them to flourish.

Quality mentoring programs need resources, thoughtful design, and follow through during implementation. Mentoring programs that take short cuts will find that their initiatives will fail.

Six Key Elements of Effective Practice for Formal Mentoring Programs

- 1) Obtain the Endorsement / Support of the Agency Director and Key Staff
- 2) Design a Sound Program Structure
- 3) Provide Incentives for field trainers
- 4) Ensure Participation From the Mentee's Direct Supervisor
- 5) Focus on the contents of the Learning Labs
- 6) Focus on the Action Plan goals

"The Tools for Excellence Program for Supervisors and the Manager's Excellence Program" is a comprehensive professional development program designed to provide support, skill building and networking opportunities for new and experienced Child Welfare Supervisors and Managers.

Key Mentoring Skills

There are fundamental personal qualities, coaching competencies and skills that are needed to be a good mentor--irrespective of whether mentoring is being employed externally, internally in the workplace or voluntarily. While exploring the essential mentoring characteristics needed, it is important to acknowledge personal qualities, existing competencies and skills learned through other experiences in order to build and expand on these areas. This will give a framework to focus on further mentoring development and learning.

Four Key Phases

There are four key phases that occur in the development of a mentor relationship and a sustainable, ongoing mentoring process:

1. *Creating a springboard* for the mentoring relationship that is of value and meaningful to the mentor and mentee.
2. *Facilitating planning*, action, results, learning and development that is natural to the mentoring process.
3. *Providing a sustainable relationship* that is creative, dynamic and productive to support the mentee's own agenda.
4. *Closure* to complete the current mentoring progress while supporting the client's future if they require further contact and check-up appointments with the mentor.

Five Key Mentoring Skills

During a mentoring session, several skills are being used at any one time during the four key phases.

Rapport: Rapport in a relationship can be seen in several ways. For example, in the level of understanding between the mentor and mentee, in satisfying expectations and in outcomes, goals and energy levels in the sessions.

Listening: Listening focuses on both the verbal and non-verbal communication that enable "listening" and an understanding of the intention of what is said and unsaid.

Questions: The purpose of powerful questions is that they make a mentee stop and think.

Communication: The way in which the mentor articulates back what has been heard. It does not have to be rational or make particular sense in the scheme of things, but it can show the client what s/he is saying to the mentor and therefore to the outside world.

Learning and experience: A mass of insights, discoveries and planned actions come out of the mentoring process. These need to be learned from and experienced in order to benefit from the mentoring process and develop the goals planned for future living.

Adult Learning Theory

Part of being an effective instructor involves understanding how adults learn best. Compared to children and teens, adults have special needs and requirements as learners. Despite the apparent truth, adult learning is a relatively new area of study. The field of adult learning was pioneered by Malcom Knowles. He identified the following characteristics of adult learners:

- Adults are *autonomous* and *self-directed*. They need to be free to direct themselves. Their teachers must actively involve adult participants in the learning process and serve as facilitators for them. Specifically, they must get participants' perspectives about what topics to cover and let them work on projects that reflect their interests. They should allow the participants to assume responsibility for presentations and group leadership. They have to be sure to act as facilitators, guiding participants to their own knowledge rather than supplying them with facts. Finally, they must show participants how the class will help them reach their goals (e.g., via a personal goals sheet).
- Adults have accumulated a foundation of *life experiences* and *knowledge* that may include work-related activities, family responsibilities and previous education. They need to connect learning to this knowledge/experience base. To help them do so, they should draw out participants' experience and knowledge that is relevant to the topic. They must relate theories and concepts to the participants and recognize the value of experience in learning.
- Adults are *goal-oriented*. Upon enrolling in a course, they usually know what goal they want to attain. They, therefore, appreciate an educational program that is organized and has clearly defined elements. Instructors must show participants how this class will help them attain their goals. This classification of goals and course objectives must be done early in the course.
- Adults are *relevancy-oriented*. They must see a reason for learning something. Learning has to be applicable to their work or other responsibilities to be of value to them. Therefore, instructors must identify objectives for adult participants before the course begins. This means, also, that theories and concepts must be related to a setting familiar to participants. This need can be fulfilled by letting participants choose projects that reflect their own interests.
- Adults are *practical*, focusing on the aspects of a lesson most useful to them in their work. They may not be interested in knowledge for its own sake. Instructors must tell participants explicitly how the lesson will be useful to them on the job.
- As do all learners, adults need to be shown *respect*. Instructors must acknowledge the wealth of experiences that adult participants bring to the classroom. These adults should be treated as equals in experience and knowledge and allowed to voice their opinions freely in class.

Learning Tips for Effective Instructors/Field Trainers

- Educators must remember that learning occurs within each individual as a continual process throughout life. People learn at different speeds, so it is natural for them to be anxious or nervous when faced with a learning situation. Positive reinforcement by the instructor can enhance learning as can proper timing of the instruction.
- Learning results from stimulation of the senses. In some people, one sense is used more than others to learn or recall information. Instructors should present materials that stimulate as many senses as possible in order to increase their chances of teaching success.
- There are four critical elements that must be addressed to ensure that participants learn:
 - Motivation
 - Reinforcement
 - Retention
 - Transference

Motivation

If the participant does not recognize the need for the information (or has been offended or intimidated), all of the instructor's effort to assist the participant to learn will be in vain. The instructor must establish rapport with participants and prepare them for learning; this provides motivation. Instructors can motivate students via several means:

- *Set a feeling or tone for the lesson.* Instructors should try to establish a friendly, open atmosphere that shows the participants they will help them learn.
- *Set an appropriate level of concern.* The level of tension must be adjusted to meet the level of importance of the objective. If the material has a high level of importance, a higher level of tension/stress should be established in the class. However, people learn best under low to moderate stress; if the stress is too high, it becomes a barrier to learning.
- *Set an appropriate level of difficulty.* The degree of difficulty should be set high enough to challenge participants but not so high that they become frustrated by information overload. The instruction should predict and reward participation, culminating in success.

In addition, participants need specific knowledge of their learning results (*feedback*). Feedback must be specific, not general. Participants must also see a *reward* for learning. The reward does not necessarily have to be monetary; it can simply be a demonstration of benefits to be realized from learning the material. Finally, the participant must be **interested** in the subject. Interest is directly related to reward. Adults must see the benefit of learning in order to be motivated to learn the subject.

Reinforcement

Reinforcement is a very necessary part of the teaching/learning process; through it, instructors encourage correct modes of behavior and performance.

- *Positive reinforcement* is normally used by instructors who are teaching participants new skills. As the name implies, positive reinforcement is "good" and reinforces "good" (or positive) behavior.
- *Negative reinforcement* is normally used by instructors teaching a new skill or new information. It is useful in trying to change modes of behavior. The result of negative reinforcement is *extinction* -- that is, the instructor uses negative reinforcement until the "bad" behavior disappears, or it becomes extinct.

Retention

Students must retain information from classes in order to benefit from the learning. The instructors' job is not finished until they have assisted the learner in retaining the information. In order for participants to retain the information taught, they must see a meaning or purpose for that information. They must also understand and be able to interpret and apply the information. This understanding includes their ability to assign the correct degree of importance to the material.

Transference

Transfer of learning is the result of training -- it is the ability to use the information taught in the course but in a new setting. As with reinforcement, there are two types of transfer: *positive* and *negative*.

Transference is most likely to occur in the following situations:

- *Association* -- participants can associate the new information with something that they already know.
- *Similarity* -- the information is similar to material that participants already know; that is, it revisits a logical framework or pattern.
- *Degree of original learning* -- participant's degree of original learning was high.
- *Critical attribute element* -- the information learned contains elements that are extremely beneficial (critical) on the job.

Overview

The Survey of Organizational Excellence (SOE) assists leadership by providing information about workforce issues impacting the quality of service ultimately delivered those served. With the rapid turnaround time of your survey report, the data provide contemporary insights into the dimensions capturing the total work environment. Understanding such issues is vital to attracting and retaining a competitive workforce and is essential to the strategic planning process.

Survey Framework: The Survey assessment is a framework captures the total work environment and at its highest level consists of five workplace dimensions. Each workplace dimension consists of survey constructs. The survey constructs are designed to profile organizational areas of strength and concern so that interventions are targeted appropriately and strategically.

Dimensions and related Constructs

Work	Accommodations	Organization	Information	Personal
<i>Supervisor Fairness Team Diversity</i>	<i>Fair Pay Work Setting Benefits Employee Development</i>	<i>Change Oriented Goal Oriented Holographic Strategic Quality</i>	<i>Internal Availability External</i>	<i>Job Satisfaction Time and Stress Burnout Empowerment</i>

Acting as a powerful wave of change, the SOE is important in both the public and private sector. The number of surveys distributed over the last 10 years has increased three-fold. Both organization and employee response has been tremendous! Such participation indicates the readiness, indeed the eagerness of employees to engage in meaningful work to improve the organization. Organizational leadership must build on this wave of energized employees and begin initiatives to improve services and benchmark results against outstanding organizations.

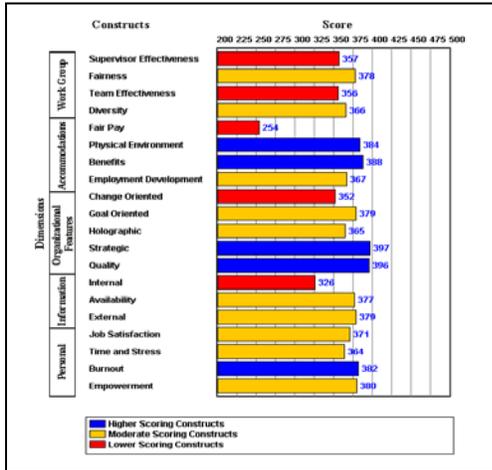
Above all, the Survey is not about just collecting data or fulfilling some type of compliance, but about promoting excellence through participation and accountability. The Survey reinforces the vital role every employee must play to the fullest at all times. The Survey emphasizes continuous thinking to formulate better, more efficient ways of getting work done. Finally, the Survey calls for candor among all employees towards building a quality organization.

Customization and cost are principle concerns for us. A survey must be made relevant (through customization) and affordable to an organization. A few examples of customizable options include an all online to paper formats, personalized greetings, various survey methods, custom items and categorical breakdowns. We understand the environment in which you operate. Therefore, we work to keep cost at a fraction of what is offered elsewhere while at the same time offering a higher level of service and a more appropriate survey methodology to fit your organization.

Survey Reports

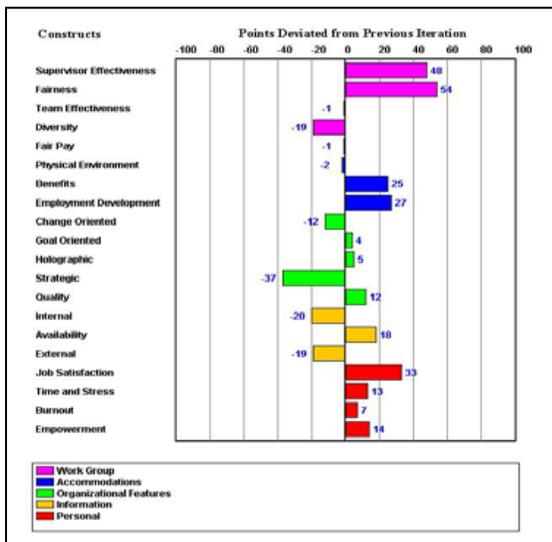
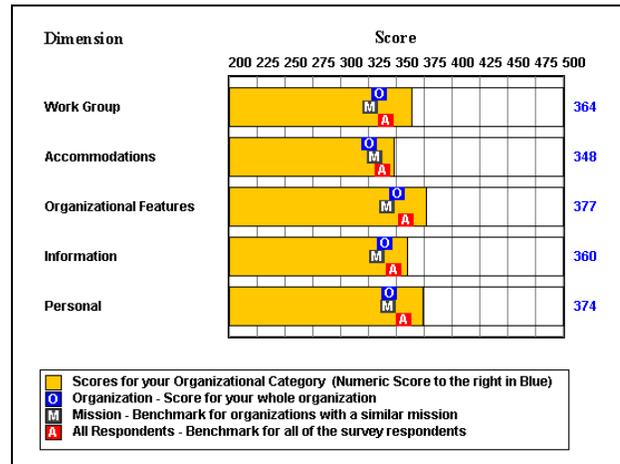
Once your survey data is received we compile, analyze, and return results to you usually within 10 working days of receipt. Two types of reports (executive summary and data reports) are returned along with a third report, an electronic spreadsheet of data for additional analysis.

The Executive Summary: This color report is useful for quickly highlighting the main points of interest without getting into excessive detail. It also offers suggestions and courses of action for a few areas and gives a detailed plan of action for your next steps.



Construct Analysis: Constructs have been color coded to highlight areas of strength and areas of concern. This data is returned in the Executive Summary and can be used to graphically depict overall results for employees, managers and board members. Reports are provided for the organization as a whole and for each organization code.

Dimension Scores: Constructs are grouped into dimensions and compared to benchmarks for size, mission, and all respondents. This comparison appears in the Executive Summary for the organization as a whole. Organizational categories are also benchmarked against the organization as a whole.



Organizational Change & Performance

Over Time: This data is also returned as part of the Executive Summary for the organization. A similar chart for organizational codes compares the scores to the organization as a whole.

One of the benefits of continuing to participate in the survey is that over time you get to see how employees' views have changed as a result of implementing efforts suggested by previous survey results.

Survey Reports Con't.

The Data Report: A comprehensive Survey data report is returned and contains detailed data on each item and construct. For each item, a score, standard deviation, number of respondents, over time, benchmarks, and frequency data are provided. Survey construct data are returned by workplace dimension and are followed by comparisons of scores to both responses over time and comparative benchmark data. In addition, the scores for the items relating to each specific construct are presented.

Electronic Data Reports:

Cross-sectional comparisons by departments, programs, or any distinct unit are possible by assigning organizational codes. Electronic survey data are returned for each code, as well as, the entire organization. This allows for easy sorting and comparative analysis of the organization's dataset.

Organizational Category (PDF Reports): For each of the organizational categories you ask employees to complete, a custom executive summary and data report is made available via pdf (printable download format). This allows those in particular programs, departments, areas, etc. to have customized reports for their review and planning.

Action Plan Worksheet and Feedback Form

NAME			MODULE		
DATE:			MENTORING		

Directions: Please complete this form through “Target Date”. Give one copy to your supervisor, Mentor, and keep one copy for your files. Before coming to the next training/mentoring session, complete the rest of the grid. Ask your supervisor to complete the Supervisor Feedback section. Bring the completed form to your next training/mentoring session.

GOAL(S) PLEASE FILL IN A MINIMUM OF 1
1.
2.
3.

Goal #	What Will You Do?	Desired Outcome	Target Date	Date Completed	Progress Code 'C', 'P', 'N'	What helped you accomplish your goal?	What Hindered You?

Supervisor Feedback

Goal #	Progress Code 'C', 'P', 'N'	Outcomes	Comments

Progress Codes: "C" = successfully completed, "P" = Partially successfully, and "N" = not implemented

Mentor Feedback

Goal #	Progress Code 'C', 'P', 'N'	Outcomes	Comments

Progress Codes: "C" = successfully completed, "P" = partially successful, and "N" = not implemented

Field Trainers Time – below is an example of how you will track your time during this program. Time sheets should be completed each month and for each mentee. The previous months hours should be submitted to UC Davis before the next learning lab meets. You will need to track the date and hours worked and provide a brief description of the topic/work completed.



Mentor Contact/Business Expenses Worksheet

Name: David Luthy Phone: 535-898-1212

Mentee(s): Mary North

DATE of Meeting	DESCRIPTION OF WORK (type of contact, topic of contact or training lab attended)	HOURS WORKED:	PAY RATE	TOTAL
5/2/09	Phone Call – Discussed strategies for implementation of individual case Management; discussed practical changes for TDM/FTM's	1.5	\$	\$
5/20/09	Face to face – attended unit meeting w/Mary and staff	1	\$	\$
5/28/09– 5/29/09	Learning Lab	12 (6hrs each day)	\$	\$
			\$	\$
			\$	\$
			\$	\$

Schedule, location & lodging

	Schedule	Notes/Revision
Course Title	<i>Supervisory Excellence</i>	
Instructor(s)	Nancy Goodman	
Day/date	August 20-21, 2009 Sept 17-18, 2009 October 15-16, 2009 November 19-20, 2009 January 21-22, 2010 February 18-19, 2010 March 18-19, 2010 April 22- 23, 2010 May 20 – 21, 2010	October 15-16 th lab will be combined with the Manager's Excellence Program. There will be no labs held in December.
Hours	9:00 – 4:00pm	The August 20 class will be from NOON to 4 pm, all other classes from 9am to 4pm
Location	UC Davis, Da Vinci Classrooms	All labs will be held in Davis at the University Club except for the October 15-16 lab, which will be held at University Extension Building in room 29.
Lodging	Best Western Palm Court 234 D Street, Davis, California, 95616 Phone: 530.753.7100 University Park Inn & Suites 1111 Richards Blvd., Davis, CA 95616 Phone: 530.756.0910 Comfort Suites 1640 Research Park Drive , Davis, CA, 95616 Phone: 530.297.1500	

	Schedule	Notes/Revision
Course Title	<i>Manager's Excellence</i>	
Instructor(s)	Mike Walker	
Day/date	August 6-7, 2008 Sept 3-4, 2008 October 15-16, 2008 November 5-6, 2008 January 7-8, 2009 February 4-5, 2009	October 15-16 th lab will be combined with the Supervisory Excellence Program. There will be no labs held in December.
Hours	9:00 – 4:00pm	The August 20th class will be from NOON to 4pm, all other classes from 9am to 4pm
Location	UC Davis, Putah Creek Lodge UC Davis, ARC UC Davis, Extension Building	
Lodging	Best Western Palm Court 234 D Street, Davis, California, 95616 Phone: 530.753.7100 University Park Inn & Suites 1111 Richards Blvd., Davis, CA 95616 Phone: 530.756.0910 Comfort Suites 1640 Research Park Drive , Davis, CA, 95616 Phone: 530.297.1500	

Program Contacts

Academy Staff	E-mail Address	Phone Number
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Nancy Goodman/ Facilitator – Supervisory Excellence Program	ngoodmanconsult@sbcglobal.net	707- 688-9681
TBD/Facilitator – Manager’s Excellence Program	TBD	TBD

References

Exploring Mentoring Program Models for Child Welfare Workers
Jerry Sherk, M.A.

Tools for Excellence Report
UC Davis, Northern Training Academy
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