LEADERSHIP TRAINING FOR NEW LEADERS

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LEADERSHIP TRAINING FOR NEW LEADERS

A Project

by

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I certify that this student has met the requirements for format contained in the University format manual, and that this project is suitable for shelving in the Library and credit is to be awarded for the Project.

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Abstract

of

LEADERSHIP TRAINING FOR NEW LEADERS

by

Sheila C. Stinson

Statement of Problem

Develop an on-boarding program specifically for new leaders to Catholic Healthcare West (CHW) corporate that would improve their socialization into the culture of CHW.

Sources of Data

Employee surveys, company websites, management interviews, needs assessments, publications

Conclusions Reached

The organizational problem CHW encountered can be attributed to the fact that new leaders were not receiving the strategic or departmental coaching needed to feel productive or successful in their new position. The active involvement of Human Resources, the CHW Learning Institute and existing managers are essential to establish a long-term relationship with the new leader that begins prior to being hired and will endure through everyday trials of the workplace. Depending on the needs and requirements, the length of the on-boarding process will vary across departments and leadership positions. The implementation of a leadership on-boarding program will help CHW align individual behaviors with strategic corporate objectives. As a result of a successful implementation of the proposed on-boarding program, CHW should experience an increase in employee and leader productivity and job engagement. This in turn benefits the whole organization both culturally and financially.

_______________________, Committee Chair
Jessica Bagger, Ph.D

_______________________
Date
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TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledgments</td>
<td>v</td>
</tr>
<tr>
<td>List of Tables</td>
<td>viii</td>
</tr>
<tr>
<td>List of Figures</td>
<td>ix</td>
</tr>
<tr>
<td><strong>Chapter</strong></td>
<td></td>
</tr>
<tr>
<td>1. INTRODUCTION</td>
<td>1</td>
</tr>
<tr>
<td>Purpose of the Study</td>
<td>1</td>
</tr>
<tr>
<td>Problem</td>
<td>4</td>
</tr>
<tr>
<td>2. BACKGROUND OF THE STUDY</td>
<td>5</td>
</tr>
<tr>
<td>Company Overview</td>
<td>5</td>
</tr>
<tr>
<td>Review of Research</td>
<td>8</td>
</tr>
<tr>
<td>3. ANALYSIS OF THE DATA</td>
<td>12</td>
</tr>
<tr>
<td>Current CHW On-Boarding Process</td>
<td>12</td>
</tr>
<tr>
<td>Review of Programs</td>
<td>14</td>
</tr>
<tr>
<td>Current Surveys and Courses</td>
<td>16</td>
</tr>
<tr>
<td>4. FINDINGS AND INTERPRETATIONS</td>
<td>18</td>
</tr>
<tr>
<td>Conclusion</td>
<td>22</td>
</tr>
<tr>
<td>Appendix A. Manager's Guide - New Employee's First Week</td>
<td>24</td>
</tr>
<tr>
<td>Appendix B. Buddy Checklist</td>
<td>27</td>
</tr>
<tr>
<td>Appendix C. Meeting Agenda</td>
<td>29</td>
</tr>
<tr>
<td>Appendix D. Company Review</td>
<td>30</td>
</tr>
</tbody>
</table>

vi
LIST OF TABLES

1. Table 1 Company Review ................................................................. 9
# LIST OF FIGURES

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Figure 1 New Hire Orientation Score</td>
<td>19</td>
</tr>
</tbody>
</table>
Chapter 1

INTRODUCTION

Purpose of the Study

Organizations worldwide are scrambling to find effective ways to attract and keep the best talent and elevate their performance, productivity and service levels to new heights (Workstream, 2010). Embodied in this quest is the ability to align company culture, individual attitudes, and behaviors with strategic corporate objectives and to motivate and reward those who meet or exceed those objectives. In today's economy, organizations must achieve maximum return on investment (ROI) in their people to boost corporate performance and gain competitive advantage (Workstream, 2010).

Reichheld and Sasser (1990) determined that organizations, where employees have above average employee satisfaction, have 38 percent higher customer satisfaction scores, 22 percent higher productivity and 27 percent higher profits. Platonova (2006), found that employees who felt the organization recognized their job performance were more likely to be satisfied while, Furthermore, research has found that individuals tend to experience greater levels of job satisfaction when their abilities, values and experiences can be utilized in the work environment and when their expectations are met (Bellou, 2010; Buitendach & De Witte 2005; Roberts & Foti, 1998). Therefore, in order to increase companies’ ROI, employee satisfaction, performance and a competitive advantage are required.
It is known that organizational culture and size are seen as critical factors affecting organizational innovativeness, which directly ties to a company’s competitive advantage. However, a number of theorists and researchers today claim that leadership is the most important factor (King, 1990; Osborne, 1998; Schin & McClomb, 1998). An ideal leadership style for promoting innovation is Transformational Leadership (Bass, 1985; Howell & Higgins, 1990). Transformational leaders use charisma, individualized consideration, inspiration, and intellectual stimulation to stimulate creativity and enhance employees’ capacity to innovate. They are future-oriented, open-minded, dynamic, and concerned about planning (Harris, 1985). Transformational leaders expect employees to think beyond themselves and to become high performers and leaders (Bass, 1985) as well as seek to unite employees and encourage them to adopt the leaders’ vision as their own to make it become a reality (Bryman, 1992) (Jaskyte & Dressler, 2005).

According to Ciulla (1995), when people ask “what is leadership?”, they are implicitly asking “what is good leadership?” or “what is ethical leadership?” For good leadership, it is important that leaders are not only competent but also ethical in their everyday conduct (Ciulla, 1995). Kodish (2006), while discussing Aristotle’s philosophy of leadership also argues that “Leadership is more than a skill, more than the knowledge of theories, and more than analytical faculties. It is the ability to act purposively and ethically as the situation requires on the basis of the knowledge of universals, experience, perception, and intuition. It is about understanding the world in a richer and broader sense, neither with cold objectivity nor solipsistic subjectivity” (Toor & Ofori, 2009).
In summary of above, to achieve maximum ROI, a company must have strong transformational leadership, high employee satisfaction and innovativeness to boost corporate performance and gain competitive advantage. Leadership on-boarding, a multi-faceted endeavor, refers to the process of integrating new leaders into an organization, of preparing them to succeed at their job, and becoming fully engaged productive members of the organization (Lee, 2010). It includes the initial orientation process and at least the next three to six months to bring a new leader to the acceptable level of productivity in a particular company or discipline (Broddie, 2006). It should be noted that on-boarding programs should be individualized to meet the needs of the company creating and implementing the program (Lee, 2010). A basic framework and formula exists; however, for the program to be the most effective it must be able to be incorporated easily and seamlessly into the current company’s business model and culture (Human Capital Institute, 2007).

The on-boarding concept represents a solid investment in terms of both reducing turnover ratio and increasing overall productivity (Workstream, 2010). Managers in large organizations estimate it takes a little over three months for a new midlevel leader to start positively contributing and just over six months to break-even on the hire (Watkins, 2003). Ciampa and Watkins (2005) found that by requiring new leaders to participate in a structured on-boarding program, they are 69 percent more likely to stay with their company after three years than those who did not allowing the break-even point to be reached sooner. By implementing a successful on-boarding program for new leaders, the ROI can quickly and significantly increase (Workstream, 2010).
Problem

The Catholic Healthcare West (CHW) Corporate and System offices, which employ approximately 1,500 employees from departments such as Finance, Human Resources, Mission Services, and Administration (Aguilar, 2008), found itself hiring qualified and experienced employees and leaders only to lose many of these individuals within the first six months. In some cases, employees were lost as soon as within the first 90 days of employment. The introductory period turnover rate was increasing beyond what is acceptable to CHW. Therefore, CHW conducted a thorough review of the new hire process and found inefficiencies with communication and training aspects. In response, an on-boarding program was developed and implemented for all new corporate and system office employees in 2009.

Although the on-boarding program has been effective for staff employees, the new leadership hires (supervisors, managers, directors and vice-presidents) still lack the fluency necessary to thrive as quickly as desired. New leadership employee productivity is not as efficient or innovative as necessary and corporate management is concerned that the new leadership group is not focused enough on CHW’s strategic future or does not understand how to be a transformational leader. Executive management feels new leadership hires tend to focus too much time on the day-to-day supervision of people and processes rather than moving through the supervisory processes and focusing on mentoring and leading their departments to become more efficient and effective components of the company as a whole (Bell-Holmes, 2009).
Chapter 2

BACKGROUND OF THE STUDY

Company Overview

Catholic Healthcare West (CHW), headquartered in San Francisco, was founded in 1986 when the Sisters of Mercy Burlingame Regional Community and the Sisters of Mercy Auburn Regional Community merged their health care ministries into one organization. The Sisters forged this union to enhance their charitable capabilities, expand the Catholic health care ministry, and promote social justice (Mercy, A Member of CHW, 2008). Since 1986, other congregations and their health care ministries, as well as non-Catholic community hospitals have joined the system. CHW has grown to a system of 43 hospitals and medical centers throughout California, Arizona and Nevada, with three business offices located in Sacramento, San Francisco, and Phoenix, and two small finance offices in San Mateo and Pasadena. CHW is now the eighth largest hospital system in the United States and the largest not-for-profit hospital provider in California, consisting of more than 9,500 physicians and 50,000 employees (Catholic Healthcare West, 2010).

The Governance and Leadership of CHW is comprised of three groups: Corporate Members, Board of Directors and Executive Management. The Corporate Members represent the top level of the governance structure. They consist of a group of Sisters representing each of the Sponsoring Congregations who, in conjunction with the Board of Directors and management, safeguard the legacy and traditions of all hospitals operated by CHW. The Board of Directors is appointed by the Corporate Members and includes
Sisters from the Sponsoring Congregations, healthcare and business leaders (Mercy, A Member of CHW, 2010). Together they are responsible for approving major decisions affecting the health care ministry, such as long-range strategic plans, the allocation of capital, joint ventures, and major acquisitions and sales. The Executive Management team is charged by the Corporate Members and Board of Directors to provide leadership and organizational management in the areas of operations, mission integration, finance and support services, as well as strategic leadership for the organization (Catholic Healthcare West, 2010).

CHW is committed to delivering health care services in an environment that is attuned to every patient's physical, mental and spiritual needs. This commitment allowed them to provide more than $1.2 billion in community benefit and free care for the poor in 2009 alone (Mercy, A Member of CHW, 2010). As seen recognized throughout all CHW facilities as well as on their websites and marketing materials, the mission and vision of CHW follows the commitment to further the healing ministry of Jesus and dedicate their resources to the following:

- Delivering compassionate, high quality, affordable health services
- Serving and advocating for sisters and brothers who are poor and disenfranchised
- Partnering with others in the community to improve the quality of life

In addition, CHW values the following above all else:

- Dignity – Respecting the inherent value and worth of each person
- Collaboration – Working together with people who support common values and vision to achieve shared goals
• Justice – Advocating for social change and acting in ways that promote respect for all persons and demonstrate compassion for their sisters and brothers who are powerless

• Stewardship – Cultivating and resources entrusted to CHW to promote healing and wholeness

• Excellence – Exceeding expectations through teamwork and innovation

The theme of CHW’s employment brand – Live Your Life On Purpose – captures the above average spirit and dedication seen everyday in their hospitals and facilities. The corporate system office employees pride themselves on innovatively supporting the needs of their surrounding CHW hospitals and medical centers while clinical staff focuses on supporting the needs of patients and community. The quality of the leadership and work environment is evident throughout the CHW network and proven by being recognized as the “Best Places to Work in the San Francisco Bay Area” four years in a row, recognized as “Best Places to Work” in various local communities of California and Arizona, and receiving 10 individual national honors for healthy environment practices from the national organization Practice Greenhealth (Catholic Healthcare West, 2010).
Review of Research

The process used to gather information was sequential, and conducted in the following order:

1. Investigation of current process at CHW
2. Review of other company processes via their websites
3. Calls and emails to other companies to validate and append to what websites revealed
4. In-person interviews with people who worked at other companies
5. Review of findings and benchmarking
6. Survey of CHW leaders at the management, supervision and VP level that started within the last one year
7. Review of classes already in place for system employees

After the initial analysis of the current on-boarding program that leaders attended, a review of six company websites was conducted for comparison in this study. For privacy and confidentiality reasons, the six companies will be referred to in this report as Apple, Banana, Cranberry, Date, Grape, and Strawberry. While Apple, Banana and Cranberry are healthcare organizations, the other three (Date, Grape, and Strawberry) are non-health care organizations (from the fields of justice, education, and finance). The non-health care organizations were included to compare and contract a different perspective to the already existing healthcare point of view. All six organizations have national presence with facilities in multiple states, similar to CHW. Table 1 shows a summary of the companies’ descriptive statistics.
To gain a richer knowledge of these organizations’ new hire leadership programs, I conducted a number of interviews with current or former employees from each organization. Apple was the only company who had a representative willing to speak specifically about their on-boarding program. The representatives of Banana, Cranberry, Date, Grape and Strawberry were not willing to speak formally regarding their on-boarding processes. Some of the representatives were not familiar with a program at their company, while other representatives did not feel they could reveal the process to a potential business competitor. Therefore, interviews were instead conducted with employees of CHW who had previously worked for each of these companies. Apple’s new leadership program was discussed from the perspective a manager who went through the program years prior. This employee was not only able to provide insight from her
own experience, but also from the perspective of a manager who watched others go through the program during her tenure. Strawberry was discussed from the perspective of an employee who watched her manager experience the process of on-boarding into the company as a new leader. The point of view of the employee, from outside of the program, was valuable to the current research in view of the fact that the employee was able to contribute what he wished the manager had knowledge of earlier in order to assist the department efficacy.

With the information received from websites, phone interviews, email correspondence and in person discussions, a benchmark was established for CHW’s leadership on-boarding program. Additional steps to increase leaders’ full understanding of CHW’s mission, values and vision as well as department specific computer training and techniques to encourage innovative strategic outlooks were part of the benchmark. This benchmark helped clarify the difference between CHW’s current leadership on-boarding program and the necessary additions to manipulate the process for the future.

With interviews and benchmarking complete, the next step was to determine what current CHW employees felt about the existing on-boarding process and their ideas for improvement. Thus, a survey was created and distributed to current CHW leaders at the management, supervisory, and vice president levels. The survey sample was restricted to individuals who began their employment with CHW within the last year. The survey was designed to assess what courses they had taken, and/or wanted to take, as well as the training approach their department took to orient them into their position. They were lastly asked to share what they personally felt would have helped more during the critical
first months of their employment and what they believed they still lacked. To wrap up the research process, a review of currently implemented curricula was performed. The review recognized the availability of the class and program subjects, times, and locations. This information is useful as training expectations are developed for managers. In some cases, classes and programs require attendees to be away from the office for as little as half a day to up to three days at a time. Other classes did not require attendees to allocate more than a few hours online as they participated in online simulations downloaded through the internal network at anytime.
Chapter 3

ANALYSIS OF THE DATA

Current CHW On-Boarding Process

The current on-boarding process includes a general overview of CHW by the recruiter and interviewers prior to hire. Once hired, the direct supervisor makes sure to have a desk, phone and computer set up with system access for the new hire prior to his/her first day. The supervisor also sets up the appropriate meetings for the new hire to attend over the next few weeks (see Appendix A for the Checklist). On the first day of work, the direct supervisor introduces the new hire to their immediate co-workers and reviews the checklist provided by the Human Resources Department. During this overview and introductory meeting, the manager will share the name of the new hire’s trainer and “Buddy” with them. The Buddy is an individual from a different department, but of relatively the same organizational level, who will help mentor the new hire during their six-month introductory period. This person should be different from the person training the new hire and should office far enough away to keep from hearing any daily communication from the new hires office and direct reports (see Appendix B for Buddy Checklist). This separation allows the Buddy/mentor to have an outside perspective of events or situations the new hire might have questions about throughout their on-boarding period.

On average, one to ten days after the new hire’s first day, the supervisor re-introduces the new hire to employees within the department during a regularly scheduled
department meeting. Within 30 days of the first day on the job, new hires attend a full
day of company orientation. This orientation includes a more thorough review of CHW’s
history, policy information, health benefit overview and a tour of the building (Hanks,
Ito, and Stinson, 2009) (see Appendix C for an Orientation Outline).
Review of Programs

During the research of the six other companies it became clear that only one, Grape, had a published on-boarding program. The program establishes a training process for their current leadership staff to become not just an employee, but also a mentor. This staff is, in turn, in charge of mentoring all new employees as they are hired. After the first year of a leader’s employment with Grape, they are required to attend the mentorship training themselves. Strawberry does not have a formal program published, but has a very clear mentor/buddy system implemented throughout the company. The difference between Grape and Strawberry is that Strawberry does not have a formal mentor class to teach the mentorship skills. At Strawberry, the immediate supervisor is assumed to already have the mentorship skills and is expected to mentor the new employee for the first six months of the new employee’s career. After the first six months, the new hire is given the opportunity to select a different mentor if they wish. After two years, the hire is then required to switch mentors. This time the mentor does not have to be a current employee of Strawberry. They can be anyone the hire chooses with the requirement they be a professional who will help guide and grow the employee within their profession. Paid time is set aside each month for employees to meet with their mentor with the employee choosing how that time is spent. Both Grape and Strawberry also provides a basic orientation class, introducing the organization, culture and organizational policies, within the first few weeks of employment.

Apple is the only healthcare company studied that requires a formal orientation class on the first day of work. During the first week, all new hires attend formal classes
designed to acquaint them with the computer programs they will use on the job. It is the responsibility of the immediate supervisor to enroll his/her new hire prior to their first day on the job for all classes necessary. Apple also has a buddy system in place, but it is voluntary and therefore only certain departments use the program; no department at the company uses the program formally for more than three months.
Current Surveys and Courses

Currently CHW leaders are surveyed twice. The first survey was developed to capture feedback on the on-boarding process from pre-hire to the first day of work and through to the 90th day of employment. This first electronic survey is sent via email to new leaders within their first year. The questions relate to their first experiences with CHW, such as “My initial hospital-wide orientation program that reviewed policies and safety was well organized and helpful” and “Supervisors and coworkers make me feel as though I am a part of the team.” The intent of the survey is to confirm the new hire’s expectations were met through accurate and available support as well as allow CHW to obtain direct feedback on how successful the new hire believed their introductory period went as a whole (see Appendix D for survey).

The second part of the new leader’s survey was produced specifically for this project. The second survey is also sent electronically through company email, as with the first survey, allowing responses to also be returned electronically, but not anonymously. Leaders, again within their first year in their role, are asked questions referencing the number of current on-boarding/leadership classes they have and asked to share the environment in which they learn in best, such as classroom, computer simulation, hands on, etc. Lastly, they are asked questions regarding the satisfactory aspects of the provided training and what information they felt needed more attention during the orientation process (see Appendix F for survey).

CHW houses its own healthcare learning institute with full-time instructors and various clinical and non-clinical courses for employees to attend free of charge while
employed with CHW. In reviewing the curriculum available through the CHW Learning Institute, it was clear that many leadership and computer courses are already available to help all leaders, build mentoring and leadership skills for all employees, not just new hires. Most classes are available through the CHW online network, as long as the employee signs up prior to taking the class. If the course is not online and requires in-person participation it is available at very least two times a year and held in one of the three main system offices.

The analysis of the data in this section proves that CHW has an on-boarding system in place, but the system is in need of improvement. The current required program is strictly to train the leaders on facility culture, department specific programs and company policies and procedures. The current program does not require new leaders to continue their professional development or challenge the leaders to think more innovatively, although the tools are available. This next section will share how the program was updated to include training in strategy and innovation as well as how to help increase employee satisfaction, boost corporate performance and increase CHW’s ROI.
Chapter 4

FINDINGS AND INTERPRETATIONS

This chapter presents the results from all investigations and surveys conducted January 2008 - December 2009. Strategic Programs, Inc., a Human Resources research firm that assesses individuals, teams, and organizations, states the industry average new hire orientation satisfaction score to be 3.69 (on a 5 point scale with 1 being strongly dissatisfied and 5 being strongly satisfied). CHW’s average, based on the second survey data collected from January 2009 through December 2009, is 4.3 (Strategic Programs, Inc., 2010). As can be seen in Figure 1 below, the orientation period scores ascertained from the second survey and calculated by Strategic Programs, Inc. (see Appendix F for survey), have continued to increase throughout 2009 suggesting an ongoing increase in the above average level of new hire/employee satisfaction. Based on this data, we can draw the conclusion that CHW’s leadership orientation and on-boarding program is not only currently aligned with industry standards, but as a whole, the on-boarding program is above industry standards; feedback from employees supports this conclusion (see Appendix G for survey results).

The increase during the last quarter, seen in Figure 1, may be due to the implementation of leadership programs, courses and strategic orientation methods all throughout this 2009 research process. As deficiencies were identified, guidance was immediately provided allowing departments to develop a system that fit their specific unit and situation. For example, leadership staff in the Finance area requested a checklist to assist in making sure tasks are complete prior to a new leader arriving in the department.
The checklist’s purpose is to remind existing leaders of the process the new leader goes through as they are orientated into CHW and through the first three to six months of on-boarding. Empowering departments to create their own style of on-boarding and mentoring with the help of newly created checklists and training could have added to the sudden increase of satisfaction.

The increase may also be due in part to an increased awareness of the on-boarding process from the current leadership team. In late May 2009 CHW’s Vice President of Human Resources distributed an email regarding the Buddy program to all leadership, making sure managers were using the program and mentoring their new hires. On-boarding surveys also continued to be sent out to new leadership asking for feedback and
opening communication on the current on-boarding structure and how to improve training for new leaders. By keeping communication open and regular the awareness of the on-boarding program may have not only increased, but also made employees know their opinions were valued, resulting in higher employee satisfaction.

To increase job satisfaction, long-term changes are necessary. Based on the two-year findings from the first survey, it appears that new leaders appreciate the department specific orientation they receive and believe it to be helpful. They do not, however feel it adequately prepares them for their position nor do they feel the connection to the clinical education required is as successful as it could be (Strategic Programs, Inc., 2010) (see Appendix G for survey results). In response to this feedback, brown bag lunch sessions have been developed and implemented as of early 2009, where supervisors, managers, directors and vice presidents all gather together once per quarter to interactively learn new techniques regarding on-boarding within their own department. Since mid 2009, a new managerial computer course is available monthly for new leaders to learn and maintain knowledge of management programs. These courses include programs such as Accounts Payable’s invoice approval system, Payroll’s timecard approval system, Recruitment’s applicant system, CHW’s email/meeting and intranet system as well as many more. Along with learning more in-depth ways to use these programs, the new leaders are also provided with a network of contacts to utilize if they have questions following the training.

The results of the second survey found that most new managers surveyed had only taken their required three courses: New Hire Orientation, Facility New Hire
Orientation and Sexual Harassment Training. This new leadership group was not taking any other personal growth or leadership courses even though the courses were available. Results clarified that managers liked the courses available and believed most all to be beneficial; they simply had not made time to take the courses. The lack of personal development confirms the corporate officer’s opinion, mentioned in Chapter 1, of spending too much time on day-to-day tasks rather than on strategy, innovation and mentoring. Leaders are now required each year to create a personal educational goal and take the necessary courses to meet the objective. This goal is tied directly to performance reviews and leaders that chose not to follow through do not receive projected increases.

Feedback from the second survey also showed most business office leaders prefer to take online courses either through WebEx, allowing interaction with other CHW leaders during the online interactive course, or through a training module allowing them to take the course whenever they have time. In response, the CHW Strategic Learning Institute has added online courses in the 2010 year as well as created certificate programs. The certificate programs are a collection of courses grouped together for the purpose of providing the opportunity to earn a certificate in a specific leadership area such as mentorship or strategic innovation. CHW is also offering, in the 2010 year, the online certificate course from Cornell University. The e-Cornell program is available to all CHW leaders and allows new as well as seasoned leaders to advance their strategic and leadership skills beyond what the CHW Learning Institute is able to provide.
Conclusion

New and updated courses are being provided through the CHW Learning Institute each quarter as a way to keep new and current leaders involved in professional development. With continued successful implementation of courses and on-boarding departmental guidance, CHW should experience continued increases in new leader productivity and job engagement while decreasing the overall breakeven point (Hanks, Ito, & Stinson, 2009). This along with the implementation of leader’s yearly review requirements, checklists, department guidance and empowerment, and continued communication and feedback analysis will help develop and maintain an intelligent and emergent transformational leadership group, which in turn will align company culture, individual attitudes and behaviors with strategic corporate objectives. CHW’s employee satisfaction should therefore increase even more benefiting the whole organization culturally and financially (Human Capital Institute, 2008) by allowing higher levels of ROI to boost corporate performance and gain competitive advantage.
APPENDIX A
Manager’s Guide – New Employee’s First Week

☐ Purchase a plant or something welcoming ahead of time to give to the new employee on his/her first day. Don’t forget a card. You may also want to think about a “goodie bag” for the employee’s first day.

☐ Greet new staff member (check pronunciation of new employee’s name) ask what he/she prefers to be called.

☐ Take him/her on a tour of both department and facility to introduce to employees. Our employees are eager to meet new teammates, so please take this opportunity to introduce your newest teammate!

☐ Go over work hours, lunch room facilities, restroom facilities, smoking rules, personal use of telephones, email; breaks-lunch, AM/PM coffee break.

☐ Discuss performance appraisal schedule/process:
  ☐ Progress review dates
  ☐ "ME" file and the requirement that an employee keep one

☐ Tell how the employee fits into the total company picture:
  ☐ Employee is part of an organization whose Vision is "To be the __________________________," whose Mission is "To be the __________________________" and whose Values are __________________________.

  ☐ Employee represents the company in contacts with customer. Every contact with external and internal customers must be handled with utmost respect and professionalism. Gossip, triangulating, and negativity do not belong at CHW!
  ☐ Employee’s personal conduct reflects on other members of the staff and the company (talk about "internal customers"—coworkers, other staff in other departments). Discuss who are your department's internal customers on a day-to-day basis.
  ☐ Importance of Privacy/Confidentiality. Review with employee departmental rules regarding customer confidentiality and privacy.
  ☐ What is our division's/department's mission/objectives and how do we accomplish them?
  ☐ Does our Department have a Web Page under MyCHW? If so, review this information.
  ☐ What makes us unique as a provider of products/services and as a place to work? Who is the competition?
Briefly explain department’s function and organization:
- Purpose of department’s work
- Relation to other departments
- Organization of department
- Specific function of new employee’s section
- Review HIPAA – What is it? What does it mean to your employee’s job function?

Review the new employee’s particular job:
- Discuss the job description
- Briefly explain the purpose of the job
- Again, stress the confidential nature of the work
- Assure the employee that he/she should ask questions about work processes and share if they notice anything that might be done better. In fact, we encourage employees to "Ask Why."
- Stimulate job enthusiasm and satisfaction in doing work accurately and efficiently.
- Briefly explain the training period (who will be the primary/secondary trainer). Advise when to check with the manager of the department, etc.
- Assign a "buddy" for at least the first week or two.

Spell your name for the employee and have the employee write it down along with the company telephone number and your extension and advise the employee to call you, if they are sick or will be out for an unplanned absence (discourage the employee from leaving you a voicemail!), as soon as possible but before the start of the employee's scheduled work time.
- Use of phone in the lunch room and on the first floor in front of the elevator (or conference rooms for private calls)
- Discourage too many personal calls.

Review work hours:
- Starting and quitting times
- Lunch and break times (lunch no later than 5 hours after start time. Breaks: Total of 15 minutes AM/PM. Lunch is non-paid and must be at least 30 minutes and not at one's desk. Fifteen minute breaks in the AM and PM are paid)
- Overtime policy

Discuss attendance records and absences:
- Where and when to submit completed time sheet
- Importance of accuracy in completing time sheets (record actual start/end work times)
- Explain how and to whom absences are reported
Stress importance of attendance and punctuality
Describe vacation scheduling (how soon should the employee request vacation time)

Show the new employee to his/her desk or workstation. Make sure the employee has necessary supplies, equipment, and instruction manuals and that phone and PC are working. Discuss the request/purchase of supply items.

Show the employee the work area. Point out the following locations:
- Rest rooms
- Coffee machine and water cooler
- Supply cabinet
- Fire exits. Discuss emergency exit plans and sweeper system.
- Emergencies (call 9-911, don't drive someone to the hospital).
- Building security

Indicate your willingness to discuss questions at any time and encourage new hire to ask questions about company policy or work procedures (remind the employee not to "assume" anything and that just because he/she hears "we've always done it that way" we are eager to hear how it might be done in a better way!)

Introduce the new employee, again, to immediate co-workers

Arrange for someone to accompany the new employee to lunch and break time for the next couple of days

Begin job instruction

Discuss who they will need to know in order to do their job (i.e. Harriett in Accounting for petty cash, Suzanne for room reservations)

Discuss company traditions, corporate culture and available training (in-house as well as external training)

Review what is on Inside CHW (i.e., provide an overview, what it has to offer, how to maneuver around, where to find telephone listing and tips, Bright Ideas form, etc.)

All visitors need to stop at the front desk and get a badge. (Again, stress that we don't let people in through any door but the front door—employee family members need visitor's badge too).
APPENDIX B

Buddy Checklist

Before new employee’s start date:

- Work space clean, including computer, phone, trash can, etc.
- Email address from IT
- Set up mailbox
- Place shortcut of Handbook on desktop

Week One:

- Meet, greet on day #1
- Walk around and tour entire facility
- Show workspace/desk
- Review company communication avenues:
  - Mailbox
  - Company-wide “associate” emails
  - Department meetings
  - Inside Mercy – monthly newsletter
  - Voicemail
- Explain regular hours, break times; paid for breaks, not for lunch
- Show how to fill out time cards electronically or by swiping
- Paychecks every other Friday in your mailbox; automatic deposit available
- Show how to check email – should check daily
- Show how to use phones and check voicemail
- Have lunch with new employee on day one; explain use of refrigerator, oven, microwave, dishwasher; we all clean up after ourselves; recycles
- Coffee and tea complimentary; show how to brew a new pot
- Fire alarm and evacuation procedure
- Review all appropriate safety procedures
- Review all machines… photocopier, fax machines, and getting supplies

During the remainder of Month #1:

- Schedule a 15 minute meeting once a week w/ new associate to check in on “how it’s going, etc.”
- Review what has already been covered in the above check list
Month #2:
Continue to hold the weekly meetings, reviewing what has already been covered and adding
- Company events: company meetings, barbecues, pot-lucks
- Company perks, such as U.S. Mail, UPS packages - gym and computer discounts
- HR will conduct one-day orientation session every month for new employees; when notified, he/she must attend. At these sessions, a thorough discussion of topics such as our benefit package, “Who’s Who” (how departments are organized, etc.), the Company Vision (as shown at beginning of handbook), how the company is managed, how the Sisters of Mercy fit into the organization, etc.
- How is the job going?

Month #3:
Continue to hold meetings – at least every other week. Review all that has been covered and
- Ask if they have any other questions

At the End of 3 Months (or end of trial period if other than 3 months):
- Mentor relationship may continue informally as desired and needed.

Mentors will be expected to meet with department supervisor periodically to give feedback for the purpose of correcting, improving the Buddy Program.
APPENDIX C

Meeting Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Employee arrival &amp; breakfast selection</td>
<td>08:30 – 08:40</td>
</tr>
<tr>
<td>Reflection</td>
<td>08:40 – 08:45</td>
</tr>
<tr>
<td>Mission &amp; Values</td>
<td>08:45 – 09:00</td>
</tr>
<tr>
<td>Welcome to CHW*</td>
<td>09:00 – 09:15</td>
</tr>
<tr>
<td>Integrity Program &amp; Compliance</td>
<td>09:15 – 09:30</td>
</tr>
<tr>
<td>HIPAA &amp; Privacy</td>
<td>09:30 – 09:45</td>
</tr>
<tr>
<td><em>Break</em></td>
<td>09:45 – 10:00</td>
</tr>
<tr>
<td>Customer Service</td>
<td>10:00 – 10:20</td>
</tr>
<tr>
<td>Employee Health</td>
<td>10:20 – 10:30</td>
</tr>
<tr>
<td>Safety &amp; Security*</td>
<td>10:30 – 11:00</td>
</tr>
<tr>
<td>Building Tour</td>
<td>11:00 – 11:30</td>
</tr>
<tr>
<td><em>Lunch</em></td>
<td>11:30 – 12:00</td>
</tr>
<tr>
<td>Human Resources &amp; Payroll*</td>
<td>12:00 – 01:15</td>
</tr>
<tr>
<td><em>Break</em></td>
<td>01:15 – 01:30</td>
</tr>
<tr>
<td>General Benefits &amp; Retirement</td>
<td>01:30 – 02:30</td>
</tr>
<tr>
<td>Flexibility Benefits*</td>
<td>02:30 – 04:00</td>
</tr>
<tr>
<td>Q&amp;A:</td>
<td>04:00 – 04:30</td>
</tr>
</tbody>
</table>

*see related handout in informational folder

SURVEY
APPENDIX D

Company Review

<table>
<thead>
<tr>
<th>Company</th>
<th># of Employees</th>
<th>Located in 2 or more states</th>
<th>Business</th>
<th>Website Helpful</th>
<th>Email or Phone or in person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple</td>
<td>100,000+</td>
<td>7</td>
<td>Healthcare</td>
<td>Have program – no outline</td>
<td>Yes – Past Manager</td>
</tr>
<tr>
<td>Banana</td>
<td>50,000+</td>
<td>3</td>
<td>Healthcare</td>
<td>Nothing Found</td>
<td>None</td>
</tr>
<tr>
<td>Cranberry</td>
<td>40,000+</td>
<td>2</td>
<td>Healthcare</td>
<td>Nothing Found</td>
<td>None</td>
</tr>
<tr>
<td>Date</td>
<td>20,000+</td>
<td>50</td>
<td>Legal</td>
<td>Training, but can’t tell if formal on-boarding</td>
<td>None</td>
</tr>
<tr>
<td>Grape</td>
<td>35,000+</td>
<td>4</td>
<td>Air Education</td>
<td>Formal on-boarding with presentation</td>
<td>None</td>
</tr>
<tr>
<td>Strawberry</td>
<td>40,000+</td>
<td>2</td>
<td>Finance</td>
<td>Orientation, but nothing else</td>
<td>Yes - employee</td>
</tr>
</tbody>
</table>
## APPENDIX E

### 90 Day New Hire Survey

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Somewhat Agree</th>
<th>Agree</th>
<th>Strongly Agree</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2</td>
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<td>3</td>
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<td>4</td>
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<tr>
<td>5</td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

1. My initial hospital-wide orientation program that reviewed policies and safety was well organized and helpful.
   
   1   2   3   4   5   N

2. The HR hiring process was organized and efficient

   1   2   3   4   5   N

3. Supervisors and coworkers make me feel as though I am a part of the team

   1   2   3   4   5   N

4. Supervisors and coworkers were thorough in explaining processes and procedures unique to my work unit

   1   2   3   4   5   N

5. My orientation to my department was done in a way that would help me succeed in my role

   1   2   3   4   5   N

6. My department orientation was helpful and informative

   1   2   3   4   5   N

7. My department orientation adequately prepared me for what to expect

   1   2   3   4   5   N
8. The clinical education orientation was done in a way that would help me succeed in my role

| 1 | 2 | 3 | 4 | 5 | N |

9. What was the most helpful part of your orientation/training?

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
APPENDIX F

Survey within 1 year of service

1) Which selection best describes your tenure as a leader for CHW?
   3 months or less  <6 months  >6 months  1 year

2) How many of the classes listed on the attached sheet have you taken while at CHW?
   None  1-3  4-6  7 or more

3) Which classes do you think would be most helpful to new leaders?
   Mark all that apply on the attached sheet

4) Which environment do you learn in best?
   Classroom/in person  WebEx  Online training module

5) Do you see a need for an on-boarding program designed specifically for leaders new to the organization?
   Yes  No

Please Explain:
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

Comments:
### APPENDIX G

Results of Surveys

| (1) My initial hospital-wide orientation program that reviewed policies and safety was well organized and helpful | January - March | 4.2 |
| | April - June | 4.05 |
| | July - September | 4.17 |
| | October - December | 4.5 |
| (2) The HR hiring process was organized and efficient | January - March | 3.8 |
| | April - June | 3.72 |
| | July - September | 3.89 |
| | October - December | 4 |
| (3) Supervisors and coworkers make me feel as though I am a part of the team | January - March | 4.41 |
| | April - June | 4.17 |
| | July - September | 4.34 |
| | October - December | 4.56 |
| (4) Supervisors and coworkers were thorough in explaining processes and procedures unique to my work unit | January - March | 4 |
| | April - June | 3.85 |
| | July - September | 3.89 |
| | October - December | 3.89 |
| (5) My orientation to my department was done in a way that would help me succeed in my role | January - March | 3.96 |
| | April - June | 3.74 |
| | July - September | 3.84 |
| | October - December | 3.94 |
| (6) My department orientation was helpful and informative | January - March | 4.03 |
| | April - June | 3.78 |
| | July - September | 3.87 |
| | October - December | 4.12 |
| (7) My department orientation adequately prepared me for what to expect | January - March | 3.92 |
| | April - June | 3.61 |
| | July - September | 3.71 |
| | October - December | 3.82 |
| (8) The clinical education orientation was done in a way that would help me succeed in my role | January - March | 3.96 |
| | April - June | 3.47 |
| | July - September | 3.83 |
| | October - December | 3.33 |
(9) What was the most helpful part of your orientation/training?

- Actual one-on-one training with other people in my exact position.
- Benefit overview.
- Everyone in my team was always open to discuss and help me with any problems.
- Going over the benefits and understanding them.
- I cannot pinpoint any one part, it was all helpful and informative.
- I liked how the HR policies were presented.
- I liked meeting with the people I would be working with.
- Just the general information about benefits.
- Just the overall view of what is to be expected as an employee of CHW.
- Knowing how the company started and their background.
- Learning about the online systems.
- Learning the policies and procedures of the department.
- My orientation was three weeks after I started and I had to do everything myself.
- Review of benefit choices and highlights. It was very informative.
- Senior leadership's visit to Phoenix.
- Support from my immediate supervisor.
- The actual orientation. There was so much information. Christopher Burnes was very accommodating and helpful.
- The benefits explanation and getting to know the company.
- The brief presentation on corporate compliance was well done.
- The entire orientation was extremely helpful in understanding what the company is about. I enjoyed learning more about the
- company culture and goals. The booklet provided by HR included phone numbers of who to contact, local area contacts, and
- HR benefits. It is all very useful. I particularly liked the insert in our booklet describing the departments that occupy our
- building, a general summary of what they do, the area of where they are located, and the building tour was educational.
- The immediate training within my group on the day to day responsibilities.
- The kick-off orientation I attended in the central coast because it was a month or so before I started and I was able to get a chance to see the EHR Alliance project.
- The one on one time with a coworker.
- The one-on-one with Laura Kirk, a coworker.
- The time with management.
- The whole orientation phase, especially how your time card works and benefits.
- There is a lot of help on the CHW Intranet.
- Understanding where we are as a system.
REFERENCES


Mercy, A Member of CHW. (2008).

http://www.mercysacramento.org/cm/content/home.asp?vendorId=&siteDomain=&siteId=.


