BEST PRACTICE NUMBER 8

GO OFFSITE TO TRAIN AND RETOOL[117]

Offsite Training Enhances Effectiveness

LMG cooperation is best built on a foundation of understanding and trust. Training is a good place to build that foundation. Offsite training, in a neutral environment, creates an opportunity for people to participate and learn new skills without the distractions or psychological "baggage" that often interfere when the training is held at the work location. No telephones intrude. Interruptions can be controlled and minimized. Away from the office, participants can dress informally, shedding some of the inhibitions or status distinctions that may get in the way of open communication, fostering a more relaxed atmosphere. There is a greater sense of "we are all in this together," if they take meals and breaks together, rather than hurrying off to the office or shop floor to check on things. Several of the APEC members spoke of training, and particularly offsite training, as one of the keys to successful change.

For example, **Ottawa Transpo** transformed a historically bitter labor-management relationship by organizing joint labor-management training in principles of in *Interest Based Negotiations (IBN)* at a remote location. The training was conducted by the *Canadian Federal Mediation and Conciliation Service*. In addition, Ottawa Transpo organized joint trips to organizations that had successfully navigated several of the challenges that it currently faced in order to observe successful practices.[118]

Philadelphia Zoo, at pp. 4-6.
[117]   By David Glines, with the assistance of David Thaler.
[118]   Ottawa Transpo, at pp. 6-9.

As was mentioned in Chapter 1, **The Philadelphia Zoo** laid the groundwork for a change in a difficult labor-management relationship through a retreat at which it had the *U.S. Federal Mediation & Conciliation Service* conduct a *Relationship-by-Objectives* program. (Please see the discussion later in this Chapter.) **Miller Dwan Medical Center**, while it did not conducted training offsite, was able to change a contentious history between the hospital and its four unions, in one case involving a deep-seated personality conflict, through training in *IBN*.[119] The **Atlantic Baking Company**, **Alcan**, and **Nortel Networks** also were able to promote agreement and improve their relationship with the help of training from their respective mediation services and other stakeholders.

This Chapter of the Tool Kit highlights the most important elements of successful training. Adult learning principles, ground rules and a few examples of training designs are featured along with the importance of needs assessment before the training

Adult Learning Principles*

It's a myth that learning capacity dwindles as a person ages. Adults learn in ways that are different from the ways that children learn, primarily because adults have more experience to "filter" new information. The "learning filter" of experience is like a double-edged sword with both positive and negative aspects because you may be able to frame new information with old experiences, but experience may also interfere with new information being assimilated. That is why is it important to follow these principles in training.

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[119]   Miller Dwan, at pp. 8-11.

1. **Adults must want to learn**. If there are likely to be barriers to motivation, the trainer is wise to remove them. For instance, if trainees do not understand the purpose and need for training, they may not be as open to the new skills and information. Establish a friendly, open atmosphere that is conducive to learning. Motivation to learn can be increased if the learning is problem-centered or if it appeals to personal gain or growth. When the conditions are right, adults seek and demand learning experiences.

2. **Practical applications are important.** Adults may not be as accepting of new information as children so theories must be supported with examples. Asking participants how they can or will apply the information may also lead to new applications as they build on each others' ideas.

3. **Adults learn by doing.** They will be looking for practical applications and the trainer can coach them better if s/he can see how they expect to apply the knowledge and skills. Retention will be directly affected by how well participants initially learn the material and the degree of usage of the information.

4. **Realistic problems are a great starting point**. The **Hankuk Electric Glass Company** case presents a good example. In that context, the need for new behaviors was a matter of survival within the context of their financial situation. While it is not always possible or necessarily desirable to provide that level of realism, it is usually possible to tailor learning experiences so they are similar to real-life.

5. **Past experience affects adult learning**. In the context of labor relations, this may mean that training in the same room where there were heated negotiations may stir strong emotions. That is one reason why it is suggested to train off-site when that is practical. The trainer may want to surface past experience, including the emotional component, so the trainees have an opportunity to distinguish between past experience and the present situation and the new information and skills.

6. **Varied methods work best**. While people may tend to favor one learning style or another, we all learn through a combination of visual, auditory and kinesthetic means. By varying the methods, all of the styles can be accommodated. Demonstrate the concepts you are teaching during the training.

7. **Adults want guidance, not grades.** Competition distracts from the learning objectives in most cases. While most schools tend to separate learners by grades, the purpose of adult learning is to keep the group together and advance them as a whole**.** The degree of difficulty should be set high enough to challenge participants, but not at a level so high that they become frustrated by information overload. When "debriefing" exercises, focus on what was done right. Rather than asking what went wrong, ask what might have been done differently and why.

*Adapted from Delian Corporation's "Eight Principles of Adult Learning" and from the US FMCS guidelines for adult learning.

Ground rules

Effective groups go through predictable stages of growth. Every group will have its own personality, but there are a few principles that most experts agree will help the group to maximize its potential. In the beginning of a group's life, goals and roles are most important. As the group matures, a code of conduct, or ground rules is very useful. As members vie for control and influence, it is helpful to have a mechanism such as ground rules to prevent unnecessary conflict and help the group stay on track. Explicit ground rules, created by the members, can be used to change destructive norms and clarify expectations for all members. Some ground rules that have been used by APEC members:

1. *The program belongs to you, and its success rests with you.*
2. *Enter into the discussion enthusiastically.*
3. *Give freely of your experience, but don't dominate the discussion.*
4. *Confine your discussion to the problem, its causes and effects.*
5. *Say what you think.*
6. *Only one person should talk at a time. Avoid private conversations while someone else is speaking.*
7. *Listen alertly to the discussion.*
8. *Be patient with other members.*
9. *Appreciate the other person's point of view. Check your understanding of the other's viewpoint by paraphrasing what you hear, and ask them if that is accurate.*
10. *Be prompt and regular in attendance.*

11. *Do not use any statement or action during the training as an action for a grievance or any other work action.*

If the group takes time and energy to assess its process periodically, ground rules take on a life of their own, encouraging productive behaviors in all sorts of group work beyond the context of training.

Training and Topics to Consider

Topics for training that were useful to some organizations in the case studies included:

- Company strategy and finances
- Customer needs
- Interest-Based Bargaining
- Brainstorming
- Consensus decision making
- Listening skills
- Problem solving skills
- Facilitation
- Group dynamics and shared leadership
- Evaluating decisions
- Changing role of supervisors
- Stewardship skills
- Data analysis
- Presentation skills
- Relationships by Objective
- Computer skills
- Gender and other diversity related topics
- Effective planning
- Effective meetings

While this is not a fully comprehensive list, it provides a decent range of the skills and topic areas that may improve the quality of cooperation. More in-depth treatment of some of these training topics is available from the United States Federal Mediation and Conciliation Service.

Effective training design takes into account adult learning principles as well as a range of learning styles. Some people learn by best with visual

representations to support the material, others rely on hearing the information, or reading. Most of us need the opportunity to process new information and try out new skills. The best training design will combine visual aides, some lecture, and multiple activities with discussion to meet the range of visual, auditory and kinesthetic learning styles.

One of the training programs mentioned by APEC members was RBO, or Relationship by Objectives. The design for that program is presented here, purely for illustrative purposes so the reader may see how a well-designed training program is laid out.

Sample Training Program: Relationship by Objectives (RBO)

I. Prerequisites for the program:

Prerequisites include a formal agreement by participants to:

- Abide by the ground rules of the program.
- Participate in all aspects of the program.
- Share costs of the program (optional).
- Not to use any statement or action during the program as an action for a grievance or any other work action.
- Follow through on the developed action plans.
- Participate in an RBO follow-up session.

NOTE: The program should <u>not</u> be conducted if the parties are less than one year away from contract negotiations. The program has the most impact when conducted following a contentious round of negotiations.

II. RBO Program Agenda

The RBO Facilitator Handbook is intended to be used as a template in designing the program. The third-party neutral should establish the agenda, which normally spans two and half or three days. The sections

will be lengthy. Timing will depend on the complexity of concerns that are raised by the parties, the severity of labor-management problems, and the skill levels of the participants.

Although the agenda will vary somewhat to meet the needs of trainees, a typical agenda for RBO looks like this:

- Overview of the agenda
- Purpose of the program
- Purpose and role of the facilitator/mediator
- Introductions/icebreaker
- Ground rules
- The RBO process and expectations
- Identifying viewpoints, concerns and conflict
- Skills building
- Transforming viewpoints and concerns into actions
- Developing an action plan
- Planning next steps (and checking progress)

III. Facilitator Handbook Structure

The *Relationship-by-Objectives Facilitator Handbook* is designed specifically to enable the facilitator to guide participants through the process of relationship building. The handbook is composed of two volumes:

- **Volume One** contains information to assist the facilitator to develop sessions that cover the basic principles and procedures of Relationship-by-Objectives. This information begins with a brief module overview, instructor notes, and a list of module sections. Each section is a complete lesson plan with learning objectives, speaking points, proposed activities, and list of materials required.

- **Volume Two** contains blackline templates for transparencies and handouts that correspond to the sections in each module. All transparencies and handouts are numbered for easy linking with the instructional material in Volume One.

The trainer can create a participant handbook by providing to the participants copies of the agenda, transparencies, and handouts. A sample cover for the Participant Handbook is included in Volume Two of the Instructor Handbook.

IV. Organization of Modules in the Facilitator Handbook

The program is divided into modules that are intended to lead the group through the processes of:

- identifying problems,
- outlining possible solutions, and
- action planning

in order to improve the labor-management relationship. Each module begins with a title page, which includes an **Overview** (A summary of the content of the module and a listing of sections within the module), **Facilitator's Notes** (A basic summary of items that the facilitator should be aware in presenting the module) and **Key Concepts and Terms** (A listing of concepts and terms that are covered in the module)

Each module contains *sections* that concentrate on a specific aspect of the process. The sections provide the general content, suggested presentations, recommended activities, and titles of pertinent videos and other resources. In terms of the handbook, each section has the following guides for the facilitator:

- **Purpose:** A statement of the overall goal of the section.

- **Objectives:** Statements of individual aspects that the participant should learn from the program.

- **Materials/Equipment Needed:** A list of audio-visual equipment, activities, and materials needed to conduct the sections.

- **Facilitator Notes:** A statement of considerations relating to the content, facilitation of activities, or other issues that should be addressed when presenting the section.

- **Set-Up:** Presented in a script or bulleted format, this segment presents introductory comments to set the stage for the section; establishes concepts, premises, and terms relevant to the section; and sets the tone for the section.

- **Activity:** An exercise or discussion that is designed to convey a specific set of skills and provide participants with an opportunity to practice specific skills. The activity usually includes:

- **Activity Set-Up:** An introduction for the activity that informs participants of the purpose of the activity and sets the tone for the activity.

- **Directions:** A set of instructions that is given to the participants, so that they understand their roles and responsibilities in executing the activity.

- **Facilitating the Activity:** A segment intended to guide the facilitator in conducting the activity so that the appropriate points or concepts are conveyed as part of the activity.

- **Processing the Activity:** A reiteration of the purpose of the activity, and an opportunity for clarifications of any aspect of the activity.

- **Wrap-Up:** Presented in a script or bulleted format, this section provides a basic recap of the purpose, objectives, and concepts presented in the section.

V. Instructional Guidelines

A third-party facilitator (neutral) with specific knowledge of the history and current state of the labor and management relationship in the organization

should facilitate the program. Neutrals should tailor the program to meet the unique circumstances of the client, based on the facilitator's knowledge of the situation, current state of labor/management relations, and a broad understanding of the union and industry. In light of the intensity and volatility of both the content and the audience, it is recommended that a team of neutrals conduct the program. The division of responsibilities for this team should be based on the strengths of individual neutrals and the unique circumstances of the situation. However, certain responsibilities should be covered:

- Logistics of the program
- Session facilitation
- Timekeeping
- Maintaining lists of concerns and objectives
- Final preparation of the Action Plan
- Computer/word-processing
- Trouble shooting

It is important to remember that the program requires substantial word-processing time and the agenda should be arranged to allow for the typing of lists generated in the activities.

VI. Optional Cost-Sharing Agreement

A cost-sharing agreement between the union and management should be developed and signed prior to the program. Parameters for determining the costs include:

- Participants paid at straight time (No overtime)
- Participants receive mileage expense
- Clerical/word-processing person available on demand during the program
- Cost of the program location
- Food/refreshments
- Lodging expense

VII. RBO Program Location

It is strongly recommended that the program occur outside the work environment, preferably in a retreat setting. At a minimum, the program environment should include:

- Large meeting room with movable furniture and enough space to conduct group exercises.
- Two breakout rooms for concurrent sessions.
- Meeting room for facilitators.
- Overhead projector and screen.
- 6 to 8 reams of paper
- Photocopier, computer (laptop), printer
- VCR and monitor.
- Flipcharts (8 pads) and 4 easels
- Masking tape and push pins
- Note pads
- Broad tip markers in red, black, blue, and green (6 of each color)
- Three-hole punch, stapler/staples, and paper clips
- Folders, pens, pencils, nametags, table tent name cards.
- Binders for final document

NOTE: Secretarial/word-processing support should be made available on demand throughout the RBO program.

VIII. Needs Assessment

Careful assessment of what is really needed will save time and energy in the long run. Questionnaires, observations and interviews are commonly used to assess training needs.

Conclusion

Training provides a channel to deliver new communication skills and new information. Participants often find training sessions to be a "safe" place to try out new behaviors. New information may be easier to digest when it is presented in a new environment, away from the office or shop floor. It may also be helpful for management and workers to share the learning environment so that each can see the other in a new light and reinforce the idea that cooperation is a journey of discovery, made easier and more effective by mutual support.

Ground rules are likely to change or enhance productive norms. These norms are likely to carry over into other group activities on the shop floor or offices. This "ripple effect" is a strong argument for the use of ground rules within the context of training and beyond.

Thorough assessment of training needs and professional design of the training will yield the best results. A well-designed training session takes into account a range of learning styles and will include a combination of lecture and activities with plenty of time for the participants to process the learnings and determine how they will apply the new information and skills. Evaluation of the training should be considered during the design phase so that improvements can be made during and after the training is implemented.

As with all aspects of LMG cooperation, off-site training is a process of continuous improvement, with both sides learning a little bit more each time from their mistakes. This brings us back to the importance of strongly committed leadership on both sides as well wise guidance from the third-party neutral. With the wisdom and optimism provided by quality

leadership, the organization can maintain the patience to reap the enormous benefits that can occur when workers and mangers have been trained to think in a new way. Once that has occurred, the sky is the limit to what they can achieve together.