

EXAMINING HOW AN EXPERIENTIAL TRAINING PROGRAM
INFLUENCES THE UNDERSTANDING OF
CORPORATE VISION AND VALUES

by

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ABSTRACT

This study investigated how an experientially based training program was used to increase employees' understanding of their company's vision and values and to build team performance. It also examined the participants' perceived understanding of an experiential training program pre- and post-session and the value that they felt they received. Through the use of focus groups and personal interviews, this study has concluded that the experiential nature of the training session led to the positive response from the participants that they had all benefited from the session with regard to their level of team performance. They also felt that it had a positive influence on their understanding of the company's vision and values, but to a lesser extent than it influenced their team performance.

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I would like to dedicate this to my father, Keith Kress, who lost his brief battle with cancer halfway through my master's program. It was your belief in me, Dad, that allowed me to be the person I am today.

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CHAPTER ONE – FOCUS AND FRAMING

Introduction

“Team building is fundamental, particularly in developing complementary teams where people’s strengths are made productive and their weaknesses are made irrelevant by the strengths of others” (Covey, 2004, p. 122). As the pace of work increases and pressure to perform at higher and higher levels places more and more stress upon individuals and teams, team building plays an even more vital role than it has in the past. As an organizational development consultant, I am involved in designing and delivering team-building programs within many organizations. The main focus of these programs is to enhance the performance of teams and individuals and to assist them in dealing constructively with the ever-increasing pressure. For this reason, team-building programs have evolved to become much more training oriented and now combine theory components with the classic experiential initiatives. In my career as a trainer I have been involved with, and have observed, many different training sessions that utilize many different styles and methods of training. These training sessions can be classified into two basic categories: experiential and traditional.

Experiential training programs utilize an activity-based model through which the participants learn through the act of doing. This can take many forms; however, most standard experiential training programs utilize team-based initiatives and/or ropes course events.

Traditional training programs follow a lecture-based learning model, and the participants learn through observation, reading, and discussion. There may be some

minor activities such as case studies or role playing, but these are generally not classified as experiential.

For the purpose of this paper I have adapted a commonly held definition and will define experiential training and development as a process in which participants learn through active participation by reflecting upon the experience and connecting it with related theory to create learning and behaviour change. Experiential training consists of a combination of team challenges, lecture, group reflection and discussion, and action planning (Experientia, n.d.).

Stephen Covey (2004) wrote, “A picture is worth a thousand words, and an experience is worth a thousand pictures” (p. 34). I believe that an experiential approach to training and development has a great influence on individual and team performance and can affect behaviour change that will have a direct and positive impact on employee commitment, personal and team performance, and the overall profitability of the business.

This is where I became interested in discovering the role of experiential training in meeting the needs of corporate teams. For the purpose of this research I developed the research question, how does an experiential training program influence the understanding of corporate vision and values? The following subquestions assisted me in better understanding corporate organizers’ expectations of an experiential session and potential participants’ perceptions of experiential training: Prior to their participation, what do the participants understand about the use of experiential training, and what do they expect to gain from their participation? In addition, after their participation, how do the

participants describe the experiential training experience, and what perceived value have they gained from their participation?

The Opportunity

As a trainer it is my responsibility to provide clients with the best training possible. I have chosen to specialize using an experiential approach. My post-training surveys consistently show a positive level 1 result on Kirkpatrick's (1977) training assessment tool, which indicates that the participants have enjoyed the session and felt that it was valuable for them. This has not, however, told me much about their experience and the specific value that they feel they have gained from their participation and the value that the organization is receiving from sending its employees on this training program. Alliger and Janak (1989) contended that a positive level 1 survey result does not necessarily translate into learning and value for the participant. Training application and behaviour change are the number one challenges for training effectiveness (Kirkpatrick & Kirkpatrick, 2005), and it is here that I as a trainer must focus.

For several years I have been working with Medcan Inc. in Toronto, Ontario. Our work together began when I developed a multi-day vision and values session for the Medcan executive leadership team. The focus of this session was to examine the existing company vision and values and to determine whether they needed to be modified to meet the current reality of the organization. Ultimately, we modified the vision and values during this retreat and then disseminated them to all Medcan employees through a one-day Values Session. This session was, and still is, intended to introduce employees to Medcan's new vision and values and to assist them in better understanding what role they play in bringing the company vision and values to life. This session is also designed as a

team-development session with a focus on educating employees on the benefits of teamwork and how to enact it at work.

Once we had completed the initial Values Session roll-out to all current Medcan employees, the program shifted its focus to new employees. The Values Session is currently used as a form of orientation program for employees new to Medcan, with a focus on vision, values, and team development. The goal is to educate the new team members on Medcan's vision and values, to help them to understand how they can translate these into on-the-job behaviour, and to set a standard of team interaction and behaviour.

This program has produced anecdotal evidence to demonstrate its value, but there has been no formal investigation into the specific benefits derived from this training program. Through this study I hoped to gain a better understanding of how this session enhances employee understanding and application of company vision and values and the role that it plays in influencing positive team development. These data will be utilized to enhance future program design to obtain the optimum result.

Significance of the Opportunity

This research presents opportunities for learning, growth, and enhanced success for both my sponsoring organization and me as an organizational development consultant. It also provides an opportunity to add to the growing body of research on experiential training.

With my involvement, Medcan has the opportunity to learn more about the role of the Values Session in influencing employee commitment, team development, and their understanding of organizational vision and values. This will provide Medcan with

concrete information that it can use to direct future training initiatives if the organization feels that the results of this study warrant such a change.

Experiential training and development is my passion and my business, and my involvement in this project has provided an opportunity for me to learn more about my chosen training specialty. This knowledge has also allowed me to create training programs that are better suited to the needs and desired outcomes of my clients.

Whereas experiential training is not new to me, the examination of the experience through focused research is. I conducted this research with a preconceived idea of why corporations use experiential training and what the participant experience is like, but this notion was based on my view of the experience only. Until this time I had never researched and documented an experiential training program. This research presented an excellent opportunity for me to grow as a trainer and to more closely study my chosen method of training.

Systems Analysis of the Opportunity

Medcan Inc. is a health management company with a focus on medical assessment and preventive diagnostics for individuals and corporations. It has recently sold part of the business that focused on rehabilitation management programs for large organizations such as Inco. Over the last few years Medcan has had a deliberate business focus on specializing in one area. Much of this follows the teachings of Jim Collins (2001), who wrote in his book *Good to Great* that organizations should strive to determine “what you can be the best in the world at; what drives your economic engine; and what you are deeply passionate about” (p. 95).

To achieve this goal, Medcan began an introspective analysis of the business. Examining its vision and values and creating the Values Session has been a part of this, as was selling the rehabilitation business. Medcan is now solely focused on being the best medical clinic possible.

Because of the focused scope of this research, the ‘system’ in which I interacted is relatively narrow. Most of the factors that influenced this research and the participants were internal in Medcan. However, some external factors influenced the behaviours and interactions of the study participants.

Medcan is a health care provider that works within the Ontario Health Insurance Plan (OHIP) program that the provincial government administers and a national health care program oversee this provincial system. Most of the services that take place within Medcan are for-fee services that OHIP covers. This fact impacts Medcan’s business from a financial and administrative standpoint; however, it does not influence the direct results of the Values Session.

Medcan is a privately owned company and therefore does not have shareholders to whom it must be accountable, but stakeholders and a board of directors are invested in the company. These individuals did not have a direct influence on the results from the Values Session.

Organizational Context

In 1985 Dr. Robert Francis founded Medcan, and it is Canada’s leading health management company (Medcan Clinic, n.d.). Its main business is a medical clinic located in downtown Toronto that offers various services, including a comprehensive health

assessment (see Table 1). Individuals can complete an extensive series of medical tests and assessments in only a few hours because all services and personnel are located in the

Table 1

Medcan Comprehensive Health Assessment

Service	Function
12-lead stress electrocardiogram	Compares the electrical impulses of the heart before and after exercise to check for heart disease
Abdominal Ultrasound	Examines the pancreas, gallbladder, kidneys, liver, spleen and major blood vessels for abnormalities
Ankle brachial index	Tests for hardening and narrowing of the arteries
audiometric test	Tests for hearing disorders or acoustic nerve disease
Bone density screening	Identifies risk for osteoporosis by looking for thinning of the bones and future risk of fracture
Chest x-ray	Allows a radiologist to check your heart and lungs for abnormal shape, size or presence of growths
Fitness appraisal	Tests strength, flexibility, body fat and waist girth for risk of obesity-related disease and V02 for aerobic fitness
Immunizations and flu shots	Routine adult immunizations and seasonal flu shots
Lab tests (blood and urine)	Cholesterol level for heart disease risk; blood count for anemia, malignancies or vitamin deficiencies; white blood cell count for immunity disorders; calcium level for bone disorders; platelet count for bleeding disorders; uric acid for risk of gout or kidney stones; glucose for diabetes risk; bilirubin, alkaline phosphate and liver enzymes for liver disease; TSH for thyroid function; creatinine and electrolytes for kidney function
Nutrition evaluation	One of our nutritionists discusses eating habits and makes recommendations for changes to improve overall health and address any specific issues
Pap smear, pelvic exam and transvaginal ultrasound (women only)	Screens for cancer, infection or abnormalities of the cervix, uterus, ovaries and fallopian tubes
Physician consultation and exam	Physical exam, health history-taking and detailed review of results with a physician who will recommend a personalized action plan
Prostate-specific antigen test (men only)	Screens for prostate cancer
Respiratory function	Checks for airway obstruction/restriction and measures lung capacity to check for asthma, emphysema and general lung health
Visual acuity and pressure tonometry	Tests the ability to see objects at near and far distances, the ability to see colors and glaucoma risk

same office. To achieve this same level of assessment outside Medcan would require many visits to many specialists and could take weeks or months to accomplish.

The Medcan Clinic is the operational name for Medcan, and its vision statement reads, “Keeping busy people healthy” (Medcan Clinic, n.d., ¶ 2). The company values include the following:

1. We are dedicated to making a difference with our clients
 2. We value the Medcan team and respect and empower our members
 3. We are devoted to excellence and innovation
 4. We embrace individual achievement both in and outside the workplace
 5. We serve our communities
 6. We reward our shareholders
 7. We are committed to the highest standards of integrity and ethical conduct.
- (¶ 4)

CHAPTER TWO – LITERATURE REVIEW

Introduction

This research project is based on the following question: How does an experiential training program influence the understanding of corporate vision and values? The following subquestions helped me to better understand the expectations of corporate organizers for an experiential training session and the perceptions of the program participants: Prior to their participation, what do the participants understand about the use of experiential training, and what do they expect to gain from their participation? In addition, after their participation, how do the participants describe the experiential training experience, and what perceived value have they gained from their participation?

The main focus of this research was an investigation of how an experiential training and development program influences the understanding of employees' vision and values. To accomplish this goal, it was important that I thoroughly understand experiential training, its developmental roots, its historical use, why it was developed, and how it is currently being used. I also examined previous studies in which the researchers attempted to qualify the benefits of experiential training in today's business environment.

Because vision and values played a large role in this study, I examined the current literature on these topics to gain an understanding of what a company vision is, what company values are, what role they play in an organizations, and how they are used to create a positive influence.

It was crucial that I also understand how the learning from training is applied. If it is not applied, it can be argued that there was no benefit, and I therefore examined the research on training application to learn how to best translate learning into action.

Topic 1: Experiential Training

Experiential training is based on the premise that people learn best by doing (Experientia, n.d.). According to the Association for Experiential Education ([AEE], 2005) Experience-Based Training and Development Professional Group website, all learning in which we engage is experience based, regardless of whether it involves the active or passive transfer of information. What makes experience-based training truly experiential in nature is the element of reflection: “By reflecting on their experiences, learners are more likely to heighten their awareness of the need for change and to achieve valuable and lasting changes in their attitudes and actions” (¶ 1).

Experiential training and development is sometimes referred to as action-based learning, experience-based training, and development or corporate adventure training. In its basic form, experiential training can be traced back to Confucius, who wrote, “Tell me, and I will forget. Show me, and I may remember. Involve me, and I will understand” (as cited in Neill, 2004, p. 1). For the purposes of this study, I will use the term *experiential training* and define it as a process in which participants learn through actively participating, reflecting upon experience, and connecting the experience with related theory to create learning and behaviour change. Experiential training consists of a combination of team challenges, group reflection, discussion, and action planning.

Over time, experiential training has evolved from the experiential learning model developed in a recreational setting. The genesis of experiential learning can be traced to

the early 19th century, when the organized camping movement and schools and organizations such as the Gunnery School and the Appalachian Mountain Club began to utilize an experience-based approach to learning (Raiola & O’Keefe, 1999). In the early 20th century, experiential learning continued to grow with the influence of experiential educator and theorist John Dewey, who suggested that education be an active, involved process through which learning can be achieved not just by observing or reading about something, but rather by doing something with the phenomenon being studied (Hutchings & Wutzdorff, 1988).

In 1941 Kurt Hann (as cited in Raiola & O’Keefe, 1999) created the experientially based training program Outward Bound, which he originally designed to enhance physical and psychological hardiness among sailors who had to survive harsh conditions at sea during World War II. After the war, Outward Bound was offered to the civilian population when the first North American Outward Bound opened in Colorado in 1962 (Raiola & O’Keefe, 1999).

These early experiential programs often used backpacking, sailing, rock climbing, and obstacle courses to create artificial stressors and challenges. From this, the participants increased their self-awareness, self-perception, and abilities (Experience Based Learning [EBL], 2005, p. 1). With this personal paradigm shift, changes in behaviours and attitudes created learning. It is this “creative tension” (Senge, 1990, p. 142), the gap between current skills and knowledge and the desired state, that creates the inspiration for learning and change. These experiential learning programs were instrumental in highlighting this. Studies began to show that shorter, one- to five-day

programs could show similar results to those of the longer, 30-day Outward Bound expeditions (EBL, 2005, p. 2).

From the roots of Outward Bound, experiential training launched into the world of corporate training in the 1970s and became what it is today. The AEE was formed in the 1980s, and the Experiential Based Training and Development branch of the AEE followed shortly thereafter, thus ushering experiential training into the mainstream of corporate training. Trainers began to incorporate experiential training into otherwise traditional curriculum to enhance their existing models (AEE, 2005). Experiential training began to support communications training, continuous improvement initiatives, change-management processes, and even such work as Stephen Covey's (1989) *7 Habits of Highly Effective People*. The goal was to make these classroom-based models come alive and to attach the theory to a powerful memory created by the experiential initiative.

The experiential training approach began to be seen as a laboratory in which the participants could learn more about their current behaviours and skills and how they influence performance and results. It was also an environment that supported risk taking and provided a consequences-free way to try something new (EBL, 2005). This form of learning was significant because as much learning can be derived from failure as from success (Kouzes & Posner, 2002; Yukl, 2002). Yukl wrote, "Surprises and failures usually provide more opportunity for learning than expected events and outcomes" (p.175).

For the corporate community to fully accept experiential training, there has to be proof that this approach to training will provide a benefit over the traditional classroom-based training. Adult learning theory, according to Knowles (1980) and others, implies

that adults will learn and retain more when they take an active role, participate more, and use multiple senses in the learning process.

The results of experiential training are often measured using Kirkpatrick's (1977) and Kirkpatrick and Kirkpatrick's (2005) four-stage progressive model, which includes (a) level 1: student reactions, (b) level 2: learning achieved, (c) level 3: transfer of changed behaviours to the workplace, and (d) level 4: results achieved in the workplace (Kirkpatrick, 1977; Kirkpatrick & Kirkpatrick, 2005). I will further discuss these four evaluation levels later in this chapter in the Training Evaluation section.

In a study of training results, Alliger and Janak (1989) found that a positive review of level 1 (student reaction) did not translate directly into performance enhancement. However, they found a positive relationship among levels 2, 3, and 4, which indicates that learning, once achieved, will likely result in the transfer of lessons learned to the workplace and, subsequently, to improved results in the workplace.

Bronson, Gibson, Kichar, and Priest (1992) examined team development scores for two groups of learners based on Bruce Tuckman's (1988) team development model, which describes the four evolutionary phases of team development: forming, storming, norming, and performing. The first group in this study was offered an experiential training program that included team initiatives that focused on teamwork, communication, trust, and support. The control group received a traditional lecture-based training session that included no experiential initiatives. The study's results show that the group who engaged in the experiential training approach had significantly higher team development scores at the four-month follow-up compared to the scores one week prior to the course, whereas a control group showed no change in scores (Bronson et al., 1992).

As research continued, Priest and Lesperance (1994) found that when their participants were engaged in an experiential training program, they maintained elevated team development scores six months after the program. Biseda et al. (2004) also discovered elevated levels of trust, communication, collaboration, problem solving, decision making, and tasking in groups six months after they participated in an experiential training program. Both studies relied on various team challenges and initiatives to make up the experiential component of this training. A control group who participated in a traditional training session showed no increase in scores after six months compared to their pre-training scores. This research added to the literature that identified the historical reasons for using an experiential training approach.

Bretz and Thompsett (1992) concluded in their study that exposure to experiential instruction will result in student reactions that are more positive than those elicited from classes exposed to the more traditional lecture-and-discussion approach to teaching. Both methods of teaching are considered effective, but the experiential training approach produces a higher level of knowledge in post-test scores, according to Lightsey (2000).

Experiential training continues to evolve and become more effective as a training approach. Priest and Gass (1996) described the six historical generations of experiential training facilitation:

1. *Letting the experience speak for itself* (1940s) forms the roots of the formal use of experiential training for corporate groups. This approach provides an experience that touches upon team competencies such as teamwork, communication, trust, and support but does not build upon this experience with discussion or theory. It creates a challenge

for the training participants to apply the experience to work because they cannot always see the correlation between the experiential activities and their work environment.

2. *Speaking for the experience* (1950s) seeks to provide insight into the correlation between the experiential activities and the work environment by explaining to the participants how the two were connected. This approach provides a more direct connection but takes away from the true experiential experience of self-discovery.

3. *Debriefing or funnelling the experience* (1960s) allows the participants to discover the connection and application of the experiential session to their work environment through a facilitated discussion process. This approach provides a purer experiential experience but lacks the introduction of relevant material that is not held within the group.

4. *Directly frontloading the experience* (1970s) adds the element of expert opinion and guidance. The experiential facilitator frontloads the experience by providing the group with information on the focus, tools, and strategies to create a better result.

5. *Framing the experience* (1980s) is a facilitation technique in which the facilitator frames the activity around a fantasy, reality, or isomorphic scenario. This approach provides a backdrop to the activity and allows the participants to better relate it to their world.

6. *Indirectly frontloading the experience* (1990s) is used when the group is having a difficult time learning from the experience and a specific focus needs to be addressed. By telling the group how not to do the activity and explaining the destructive behaviours that may result, the facilitator guides the participants towards an alternate and more positive solution.

For the purposes of this research, I investigated the Medcan Values Session, which uses a variety of experiential tools, including team initiatives and a high-ropes component. The specific experiential activities include several initiatives that focus on continuous improvement, team development, and communication. These activities are intended to provide a greater level of understanding of high-performance teamwork and of how vision, mission, and values influence and direct employee interaction. The high-ropes component of the program consists of one high element known as a *High-V*. In this activity two participants work together to negotiate a V-shaped tightrope suspended 35 feet off the ground. The participants wear harnesses attached to ropes to provide a safety system that the rest of the team grasps. This event dramatically exposes the need for teams to build trust, to support one another, to communicate clearly, and to provide leadership. The team-designed vision statement focused on high performance and values that is discussed earlier in the session offers guidance in the interactions during this activity. This method allows the team to examine the power of vision and values to guide their interactions and determine how they can create a desired team environment through the intentional use of vision and values.

Topic 2: Corporate Vision, Mission, and Values

Because vision, mission, and values have been a major focus of the Medcan training program and this was one of the areas of investigation in this study, I examined the current use of vision, mission, and values within corporations to determine how they are used and what function they serve in employee commitment. As well, I examined current methods of enhancing the understanding and use of vision, mission, and values in a training program.

Vision, mission, and values are all used to provide organizational clarity and direction, which will ultimately lead to higher levels of performance and a better bottom line. Vision, mission, and values have been the most widely used management tool over the past 20 years to motivate employees by showing them how their job fits into the grand vision and direction of the organization (Goleman, 2000a). According to Bart (1996a; 1997b), vision, mission, and values have also been the least respected and most ineffectively used tools available to managers and leaders. He surmised that this is often the case because many leaders and employees do not know the difference between a vision, a mission, and core values, and they do not know how to implement them to create a positive influence on performance.

A company vision describes what is to be attained, the mission describes why it is to be attained, and core values direct people's interactions in achieving the mission and striving towards the vision (Senge, 1990). To use these tools effectively, it is important, first, to understand what they are and how they differ.

A vision is the description of a future state that an organization seeks. An example is Bill Gates's (2005) vision for Microsoft of "a computer on every desk and in every home" (¶ 1). This vision may take years to achieve and is lofty in design (Collins, 2001), but Gates's intent for the vision is to provide a clear focus of direction. Stephen Covey's (2004) second habit of highly effective people is to "begin with the end in mind" (p. 152). This is essentially what a vision is: It provides the end that an organization is seeking. Without a vision, it is difficult for the leadership and employees to know where they are going.

A mission answers the question Why do we exist? (Bart, 2001; Bart & Baetz, 1998; Senge, 1990), which gives an organization and its employees a purpose. A mission usually transcends beyond the sole purpose of making money and often incorporates an idea of how the organization intends to become unique and add value to the world. The mission is often more tangible than the vision and can be achieved on a daily basis, which ensures that employees know why they are doing what they do.

Core values answer the question “How do we want to act, consistent with our mission, along the path towards achieving our vision?” (Senge, 1990, p. 224). Core values describe how the company “wants life to be” (p. 224) on a day-to-day basis while it pursues its vision. Core values guide all internal and external interactions.

Most companies have a vision, a mission, and core values, but many do not use them effectively or at all. Studies have shown that the use of a vision, a mission, and values can increase the clarity of direction, as well as employee performance and morale. Goleman (2000b) reported in his research on emotional intelligence and leadership styles that mission is a critical tool that authoritative leaders use. Goleman showed that the authoritative leadership style is the most effective in creating a positive work climate. McClelland (as cited in Goleman, 2000b) described *climate* as including six key factors that influence an organization’s working environment: flexibility, responsibility, standards, rewards, clarity, and commitment. Bart (1996b) found that an organization’s mission statement has a positive influence on the firm’s innovativeness and employees’ motivation.

For vision, mission, or values to be used effectively requires a deliberate and planned process. First, a leader, team, or organization must discover what the

organization is. A company and a team already have a vision, a mission, and values; they are not created, but rather discovered, because they already exist (Collins, 2001). Second, once they have been discovered, they must be communicated to all involved. This communication must ensure that the information is received, understood, and remembered, and the information must be used and talked about on a regular basis if it is to become part of the culture and a useful management tool (Lencioni, 2000). Last, the usage and results of the vision, mission, and values must be measured. If they are not measured, it is difficult to determine what influence they are having and how to enhance performance through the use of these tools (Covey, 2004; Kirkpatrick, 1977; Kirkpatrick & Kirkpatrick, 2005).

Training programs take the two basic forms of creating and teaching vision, mission, and values. When an organization seeks to create a vision, a mission, or values, it often assembles the senior leadership team at an off-site retreat at which the team discusses and writes its vision, mission, or values. In *Good to Great*, Jim Collins (2001) argued that the discovery of a company's vision, mission, and values should involve other levels of the organization beyond the senior team. Once the vision, mission, and values have been written, they are commonly disseminated to the employees through e-mail, meetings, and posters.

In this research I examined the Medcan Values Session and its influence on the employees' understanding of vision, mission, and values and on their ability to translate them into actions and behaviours. By using experiential initiatives, the team members discover and discuss the importance of vision, mission, and values and, through this

process, gain a greater understanding of their importance and discover how they can use them to guide their everyday interactions.

Topic 3: Training Evaluation

The purpose of all training programs is to enhance understanding or performance in a specific area. Nickols (2000) reported that the field of training as we know it today originated when industry leaders began to switch their focus from the technical training of physical labour to developing the intellectual capital of the knowledge worker. Until this time, Covey (2004) wrote, workers were primarily hired for their physical labour, and their minds were rarely accessed. Senge (1990) added to this that, as the era of the knowledge worker emerged, organizations began to utilize their employees' huge recourses of information. To harness, channel, and develop this resource, companies began to introduce training to their employees. However, after a while, the leaders began to wonder whether these training programs were producing the desired results (Nickols, 2000).

The science of training evaluations began when Bob Mager (as cited in Nickols, 2000), a prominent trainer in the 1960s, asked the question "What is the trainee supposed to be able to do as a result of training?" (p. 1). Until this time there was no standard for evaluating training. This changed when Kirkpatrick (1977) developed and published his now world famous four-level evaluation model in the 1959 edition of the *Association of Training and Development Journal*. Although there have been many new training evaluation models since Kirkpatrick's, his is still the standard, and most others are based either loosely or directly on his model.

Kirkpatrick's (1977) model is composed of four levels of evaluation that measure different types of training results. This evaluation can take place before the training, during the training, after the training, after re-entry into the workplace, and upon exiting the workplace. When and what to evaluate depends on the information that is being sought.

Level 1 focuses on the immediate reactions of the training participants to the training. In Kirkpatrick and Kirkpatrick's (2005) words, the evaluation is intended to determine "how well they liked it" (p. 5). This is purely reactionary and does not go beyond the feeling stage. A level 1 evaluation is generally conducted at the conclusion or very shortly after the conclusion of a training session and is typically conducted with the use of a post-session survey.

Level 2 determines whether the training participant absorbed and learned the material. Kirkpatrick and Kirkpatrick (2005) explained that this level of evaluation measures "what principles, facts and techniques were understood and absorbed" (p. 6). Level 2 assessments are often conducted with the use of a survey, test, or interview. The assessment of level 2 requires that a pre-session baseline be determined to compare it to the post-session level. The evaluator seeks an understanding of what the training participant knows about a particular subject before the training and whether the training has changed this level of knowledge. This level of evaluation focuses on the ability of the training program to enhance the participant's retention and understanding of the training material.

Level 3 focuses on what extent "on-the-job behaviour has changed as a result of the program" (Kirkpatrick & Kirkpatrick, 2005, p. 6). Based on the content of the

training program, including the learned skills or theory, the training participants often modify their behaviours or actions during a training session to realize different results. This level of evaluation determines whether this behaviour change has transferred to the workplace. The evaluation takes place once the training participant is back on the job, and it can involve tests, surveys, interviews, and performance reviews. However, because it often deals with behaviour change, this level is more difficult to measure. The evaluator must determine the behaviours or skills that the training was intended to influence, learn the participant's pre-session level of understanding and skill, and then measure the learning that took place at the training session (level 2) and whether the participant has applied it to his or her everyday performance. This level of evaluation requires the involvement of the trainer, the training participant, and usually a manager who will conduct the at-work assessment.

Level 4 determines "To what extent have results occurred because of the training?" (Kirkpatrick & Kirkpatrick, 2005, p. 7). According to Nickols (2000), this level focuses on the "reduction of costs; reduction of turnover and absenteeism; reductions of grievances; increase in quality and quantity of production; or improved morale which, it is hoped, will lead to some of the previously stated results" (p. 1). This area is often very important to leaders when they are determining which training programs to keep and which to cancel. The evaluation takes place in the workplace post-training and is often fairly complex to determine. To effectively evaluate level 4, the company must examine the areas of measurement pre- and post-training and determine how the training participant's behaviour change led directly to a change in the

measurement. At this level of evaluation the focus shifts from the learner to the payoff to the organization.

For the purposes of my research, I examined Kirkpatrick and Kirkpatrick's (2005) level 2 evaluation in relation to the effectiveness of the Values Session in increasing the participants' understanding of Medcan's vision, mission, and values. I accomplished this by conducting focus group sessions pre- and post-training. The goal of the pre-session focus group was to gain an understanding of the participants' knowledge of Medcan's vision, mission, and values before their attendance at the Values Session. Then, once the employees attended the Values Session, I conducted the post-session focus group to determine whether their knowledge and understanding of Medcan's vision, mission, and values had changed.

CHAPTER THREE – RESEARCH METHODOLOGY

Introduction

This chapter will provide a detailed description of how I conducted this research. I will describe the selected tools, the methods, and the rationale behind these choices. The following research methodology will focus on answering the question, How does an experiential training program influence the understanding of corporate vision and values? I also used it to answer several sub questions: Prior to their participation, what do the participants understand about the use of experiential training, and what do they expect to gain from their participation? In addition, after their participation, how do the participants describe the experiential training experience, and what perceived value have they gained from their participation?

Research Approach

To gather anecdotal evidence and qualitative measurement for this study, I chose an action research approach. Stringer (1999) described action research as “the search for understanding in the company of friends” (p. 215). The premise is that if the research participants feel comfortable and have a personal connection with the researcher, they are more likely to provide honest and accurate feedback because they will have a greater commitment to the project.

I engaged study volunteers in focus group discussions to gather the required data to answer my research questions. The purpose of these personal discussions was to gain insight into the program participants’ thoughts and feelings and to record a first-hand description of their pre- and post-program experience. In the focus group setting I was able to build rapport with my research participants and work with them collaboratively to

understand their story, and I asked questions to gain greater insight into their responses and confirm my understanding of what they said.

Action research differs from traditional research methods in that it creates a “mutual intertwining” (Guba; as cited in Stringer, 1999, p. xiii) between the participants and the researcher, who act together as a collaborative team. Action research combines action, reflection, theory, and practice in a participative manner to attain practical solutions to the challenges of life and enhance the positive development of people and communities (Reason & Bradbury, 1996). Consultants often use action research to engage their clients as co-researchers to attain a more suitable solution to the problem at hand (Dick, n.d.). During my study I acted as a researcher, but I will use the data that I gathered as a consultant to help Medcan plan and implement more effective training sessions.

Action research, as with all research, starts with a question to be answered or a problem to be solved. It is, ultimately, a “search for meaning” (Stringer, 1999, p. 203). To accomplish this, action research directs that the traditional research subjects be actively involved in finding the answers. This design provides the research subjects—now participants—with a way to collectively clarify their problems and create new ways of seeing their current reality and the future they seek. By having the research participants so intertwined in the project, the researcher can gain a much more accurate understanding of the everyday experience of human interaction, thus allowing “the audience to understand more clearly the realities of people’s lives” (p. 207). This enables the research to be a participatory process that allows people to have a more direct influence over the significant issues that detract from their lives. Action research has this

impact because the conclusions are derived from the ideas that the people involved in the study generate. These ideas “make sense” (p. 211) in their homes, offices, and other social contexts of their lives.

I chose an action research approach because the data I was seeking would be most easily captured through active inquiry and would not lend themselves well to a quantitative approach. To gather the required data for this research, I used two primary data-collection tools: focus group discussions and personal interviews. The focus group sessions helped me to gain insight into the pre- and post-experience of the training session. The personal interviews provided further insight into the data from the focus group sessions and allowed me to investigate recommendations once I drew conclusions from the initial data. These interviews were a combination of face-to-face interviews, telephone interviews, and e-mail discussions. A qualitative approach allowed me to document the participants’ experiences through their own words and reflections and to gain deeper insight into areas that each participant considered personally important. Ultimately, this has provided me and Medcan’s employees and leadership with a greater level of understanding from which to make future training decisions.

Project Participants

In the act of conducting qualitative research, I did not select from a large population with the intention of creating generalizations across a larger population; my study volunteers were from only my sponsoring organization, Medcan. This meant that I had only a relatively small population from which to draw, and I did this purposefully to gain the greatest insight into my research topic (Glesne, 1999), which was the Medcan employee experience. I used a “typical case sampling” (Patton; as cited in Glesne, 1999,

p. 29) method to illustrate what is typical and normal within Medcan and which is more “illustrative than definitive” (p. 29).

The participants in this study were comprised of recently hired Medcan employees and employees with various lengths of tenure at Medcan. The study participants represented various roles within the company and included people from the following departments: administration, finance, sales, marketing, medical, case management, and department management. Within each of these departments I had volunteers from various hierarchical levels, including leadership, management, and team member, who provided a cross-section of the organization and various points of view. When I had collected and analysed the data, I felt that they presented a detailed and accurate portrait of how these employees at Medcan viewed the Values Session.

For my first focus group session I asked for volunteers from only those Medcan employees who had not yet attended one of the Values Sessions. The purpose of this was to gain a pre-session view from these people and learn their preconceived ideas of the session and experiential training. This limited me to 17 recently hired employees, most of whom had worked at Medcan for six months or less and from whom I would ask for volunteers. These people participated in a Values Session on May 4, 2006; I therefore conducted my first focus group session prior to the May 4 Values Session. From this group of 17 potential study volunteers, 4 people attended my pre-session focus group.

I also collected data from Medcan employees who had previously attended a Values Session. This provided me with a much greater number of potential volunteers, but did not produce many more volunteers than the first group. From a population of 110 employees, 6 volunteered to participate in this study.

Shaun Francis, my sponsor and the president of Medcan, was also involved in this study as a participant. Mr. Francis assisted me in analysing the collected data and provided direction for the second set of interviews.

Data-Gathering Tools

I used two main research techniques during this study: focus group discussions and personal interviews. I could have stopped with only one technique, but Glesne (1999) advised that “the use of multiple data-collection methods contributes to the trustworthiness of the data” (p. 31). The focus group discussions were designed to enable me to uncover general themes, and the personal interviews would provide me with clear direction and recommendations to deal with the issues brought up in the focus group discussions. In this manner the people who are most directly affected by the Values Session were able to provide their insights and recommendations for future sessions.

The focus group format that I chose to use is a type of interview conducted in a group setting that has a series of focused and specific questions. This technique allowed me to explore each participant’s understanding of the Values Session and the values they perceive they have received from their participation. This provided me with an accurate and in-depth understanding of the participants’ pre- and post-program experience and the value that the participants and Medcan as a company derived from this session (Powell & Single, 1996).

I chose a focus group approach because it would provide a relaxed setting for the participants to interact and would produce a high level of information in a short period of time (Morgan & Spanish, 1984). This research technique facilitated the participants’

ability to help each other to formulate their thoughts and validate what they had experienced.

I chose my second data-gathering technique, personal interviews, for two reasons. First, the personal discussion would allow me to gather a greater depth of information from each participant. I would engage them in a focused discussion, and they would not face the challenge of competing for time with other participants. It would also elicit a purely personal response and not just agreement with what others had said. Second, I chose this method to respect the participants' time and to access them at a time that was convenient for them. This was intended to create an atmosphere that was less polluted with competing priorities. Although in the development phase of this research the personal interviews seemed to be a valid option, they proved difficult to put into practice for reasons explained in chapter six of this report.

I also utilized observation and experience to enhance my understanding of the interview data and to help me formulate my interview questions for the pre- and post-session focus groups. Glesne (1999) explain that "the experience of learning as participant observer often precedes interviewing and is the basis for forming questions" (p. 69). I have had a great deal of interaction with Medcan employees in the past and have had an opportunity to observe employees during past Values Sessions and in their work environment. This previous understanding and my participation in the Values Sessions assisted me in formulating the appropriate questions to gather the data that I required from the pre- and post-session focus groups.

Once I had collected the focus group data, I sorted them into themes based on each question. The similarity of the questions for the pre- and post-session focus groups

provided me with an accurate picture of employee experience. From here, I conducted personal interviews.

I interviewed and had a discussion with my sponsor, Shaun Francis, to review the data and to gain his insight. Because his job of president of Medcan is to guide the developmental direction of the company, I was seeking his guidance in the future direction of the Values Session.

Once Mr. Francis offered direction, I conducted interviews with the study participants to gather their recommendations on how to follow this direction. I sent each volunteer an e-mail to outline the focus of our next interview based on the direction that the Values Session would take in the future. In this e-mail I also requested an in-person, telephone, or e-mail interview to discuss their recommendations.

Study Conduct

This section will explain the process that I followed in conducting this research. I will first provide an overview of the steps that I took and then explain each step in detail. My goal is to provide a clear description of this research so that it may be replicated within Medcan or another organization with a similar research goal in mind.

General Project Overview

After securing Medcan as my sponsor, I spoke with Shaun Francis, president of Medcan, to determine the goal and focus of this research. Although I already had an idea of where my interests were, Mr. Francis was able to inform me on what would be of value to Medcan. Through this discussion we determined the exact focus of this research.

I then connected with the Medcan HR director, who assisted me in sending an e-mail invitation (Appendix A) to all new Medcan employees. I requested that they

respond directly to me to ensure as much confidentiality as possible. These research volunteers then attended the first of two focus group sessions.

Subsequently, I sent a second e-mail invitation (Appendix B) to all Medcan employees. Once again I requested that the volunteers respond directly to me. These people then attended a second focus group session. Once I had collected the data from both focus group sessions, I analysed them, sorted them into themes, and developed a conclusion statement. I took this information to Mr. Francis to gain his insight and to determine a course of direction for the training session based on the information that I had collected. Once we determined a direction, I connected with the research participants in a personal interview to solicit their recommendations.

Detailed Project Overview: Focus Group 1

I e-mailed the first invitation letter directly only to new Medcan employees who had not yet attended the Values Session. The HR director assisted me in sending this letter because I did not have access to Medcan employee e-mail addresses. In the letter I requested that interested persons respond directly to me. Once I had obtained my research participants, I e-mailed them about a meeting time and location for the first focus group session.

The goal of the first focus group was to attain a pre-session understanding of the participants' knowledge of the Values Session and the use of experiential training in this session. When the research participants arrived at the designated meeting, I introduced myself, my connection with Medcan, and the focus of my research. I asked each participant to keep the information discussed in the focus group confidential and to sign an informed consent form (Appendix C), which I explained to them. I reported that I was

bound by Royal Roads University's ([RRU] 2004) ethics policy to maintain confidentiality, but that members of the group might choose to breach that confidentiality. I further explained that I would use all of the information from this study to complete my master's thesis and, with their consent, for projects outside this scope. When the volunteers signed the informed consent forms and I collected them, I began the focus group session.

To focus the session I engaged the group in a guided discussion by asking a series of questions:

1. What is your understanding of the objective of the Values Session?
2. What do you expect to gain from your participation in this session?
3. What is Medcan's vision?
4. What are Medcan's values?
5. What is your understanding of an experiential training program?

I designed question 1 to create a baseline understanding of how employees at Medcan viewed the Values Session. Because none of the research participants in the first focus group had yet attended a session, I could obtain this information only through discussions with other Medcan employees who had attended a session in the past. This would provide me with an anecdotal description of how they perceived the session within the Medcan culture.

Question 2 examined the personal goal of each research participant. They already had some information on what the session involved and what the intended objective was, and they could express their personal objectives in attending the session. This would

allow me to determine whether the employees were attending the session for the same reason that it had been designed.

Question 3 helped me to gain a baseline understanding of the level of knowledge of new employees on Medcan's vision. Simply, do they know it or not?

Question 4 was similar in design with respect to Medcan's values. My objective was to determine new Medcan employees' level of knowledge on Medcan's values.

Question number 5 provided me with a baseline understanding of how Medcan employees perceive an experiential training program. Because experiential training is a relatively common tool used within many corporations, I concluded that, even though the research participants had yet to attend this particular experiential session, they most likely had participated in an experientially based training session in the past. If they had not, they would have heard of the technique and formulated an opinion about it. I believed that this question could provide insight into how a more general corporate audience would view experiential training programs.

I captured the main themes from each of the questions on a flipchart that I placed in view of all of the participants so that they could confirm my interpretation and transcription of what they had said. At the end of the session I reviewed each question and the themes that I had captured and asked for modifications or further thoughts. Through this process I validated the information that I had captured.

I e-mailed the second invitation letter to all Medcan employees who had attended the Values Session in the past. The HR director assisted me in sending this letter because I did not have access to Medcan employee e-mail addresses. In the letter I requested that

interested persons respond directly to me. Once I had obtained my research participants, I e-mailed them a meeting time and location for the second focus group session.

Detailed Project Overview: Focus Group 2

The goal of this second focus group was to attain a post-session understanding of the participants' knowledge of the Values Session and the use of experiential training in this session.

When the research participants arrived at the designated meeting, I introduced myself, my connection with Medcan, and the focus of my research. I asked each participant to keep the information discussed in the focus group confidential and to sign an informed consent form (Appendix C), which I explained to them. I reported that I was bound by RRU's (2004) ethics policy to maintain confidentiality, but that members of the group might choose to breach that confidentiality. I further explained that I would use all of the information that I gained from this study to complete my master's thesis and, with their consent, for projects outside this scope. Once the volunteers had signed the informed consent forms and I had collected them, I began the focus group session.

To focus the session I engaged the group in a guided discussion by asking a series of questions:

1. What benefit did the Values Session provide to you personally and to Medcan teams in general?
2. How would you describe the experiential training approach?
3. What is Medcan's vision?
4. What are Medcan's values?

5. Do you feel you have a better understanding of how you can live Medcan's values? Please explain.
6. Do you feel that your participation in the Values Session has enhanced your level of commitment to and engagement with Medcan? Please explain.

I designed question 1 to gain an understanding of the value of this session to the participants. From here I could determine whether the actual benefit was the same as the intended value.

With question 2 I sought an understanding of how the participants viewed and would describe an experiential training program. As a practitioner of this technique, I have a predetermined definition of experiential training. I often feel that this definition is the same as the participants' definition, and this question would determine whether this assumption is correct.

Question 3 would reveal whether the participants had a greater understanding of Medcan's vision post-session than they did pre-session. This question was critical because I originally designed the session to introduce Medcan employees to Medcan's new vision.

Question 4 would determine whether the participants had a greater understanding of Medcan's values post-session than they did pre-session. This question was critical because the session is called the Values Session and was originally designed to introduce Medcan employees to Medcan's new values.

Question 5 examined the participants' direct application of their learning from the Values Session. I wanted to know whether they had a better idea now of how to translate

Medcan's vision and values into actions and behaviours than they did before they attended the session.

Question 6 sought to determine whether Medcan's provision of this training session and their participation in it enhanced their commitment to and engagement with Medcan in any way.

I captured the main themes from each of the questions on a flipchart that I placed in view of all of the participants so that they could confirm my interpretation and transcription of what they had said. At the end of the session I reviewed each question and the themes that I had captured and asked for modifications or further thoughts. Through this process I validated the information that I had captured.

Detailed Project Overview: Data Analysis and Direction

Once I had collected the data, I examined each question independently. I looked at the responses and created a themed statement for each question and an overall conclusion statement based on the themes that emerged from each question. I then e-mailed them to the research participants for validation. When they had validated all of the themed statements, I took them to Mr. Francis to share the findings with him and to discuss future direction for the Values Session.

Upon meeting with Mr. Francis, I presented the data that I had translated into themed statements and a conclusion statement. We discussed the data and what it meant for the Values Session and then decided upon a direction for the future of the Values Session.

Detailed Project Overview: Participants' Recommendations

Once we determined this direction, I e-mailed each research participant the results of this discussion and asked them to participate in one final interview to elicit their thoughts and recommendations on how the Values Session could be modified to meet the stated direction. I met with each research participant in a telephone or in-person interview or through e-mail if necessary. I took notes of our discussion, transcribed them, and returned them to the participants for validation. Once validated, I used this information in the recommendations section of this report.

Data Analysis

To create meaning from the collected data, I examined each question independently and summarized all themes in a conclusion statement, which allowed me to examine each question in depth and then to determine a theme from the participants' responses. When I had examined all of the questions, an overall theme emerged.

To create themes, I highlighted important words in the responses to each question from the flipchart notes. After reading through the responses, I built a statement that encompassed the highlighted words and the overall theme from the responses to each question. I then e-mailed this statement to the research participants and sought their verification. Once I received it, I accepted the themed statements from each question as data.

When I completed the themed statements, I once again highlighted important words. These words emerged in a pattern on several different topics. I then wrote a sentence for each topic and formed it into a conclusion statement that provided an overall

view of the Values Session experience. When I e-mailed this statement to the research participants, they validated it.

Subsequently, I presented these compiled and analysed data to Mr. Francis, and we discussed the meaning of the data and how they reflected the Values Session. The main focus of our discussion was whether the stated program objectives were congruent with the participants' stated experience and value. We then discussed the future direction of the Values Session. Based on Medcan's overall vision, we determined the Values Sessions' focus for the future.

I presented this direction to the research participants to gather their responses and recommendations. Again I compiled the information and themed it similarly to the data that I collected from the focus group questions. I then validated it and will discuss it in chapter four of this report.

Ethical Issues

During this action research project I interacted directly with the participants to record their thoughts, feelings, actions, and interactions. As a result of this close connection, it was critical that, as a researcher, I ensured that I followed ethical practices during my research. Several people and institutions were involved in this research, and I was therefore responsible to all. They included RRU, my sponsor, Medcan Inc., and the training participants from Medcan.

I conducted this research while adhering to RRU's (2004) Research Ethics Policy and RRU's (2000) Policy on Integrity and Misconduct in Research and Scholarship, which is based on the eight guiding principles outlined in the Tri-Council policy statement (Canadian Institutes of Health Research, Natural Sciences and Engineering

Research Council of Canada, & Social Sciences and Humanities Research Council of Canada, 2005). This policy statement includes respect for human dignity, respect for free and informed consent, respect for vulnerable persons, respect for privacy and confidentiality, respect for justice and inclusiveness, balancing harms and benefits, minimizing harm, and maximizing benefit. The policy provided clear guidelines as I conducted this research.

Ensuring free and informed consent was critical to maintain trust and open communication throughout this research. I gave all of the participants an informed consent form that I fully explained to them. I informed them about the focus of my research and my connection with Medcan. We spoke about confidentiality and the importance of not disclosing personal names or statements outside the research room. I explained that they were free to opt out of any stage of the research process at any time, without penalty, and that I would remove their contributions from the collected data upon request. With this full disclosure, everyone who chose to become involved in this research did so with informed consent.

Because of human nature and past experience, aspects of this research might have had the potential to make the participants feel vulnerable. Although, to my knowledge, this did not occur, I maintained a close watch over my interactions with the research participants to avoid potential situations in which they might feel vulnerable. For this reason I reminded all of the research participants that they were free to opt out of the research at any time.

To ensure the research participants' full commitment and disclosure, I guaranteed their privacy and confidentiality as far as possible within my control. I included this

statement in the informed consent form that all research participants read and signed. I held myself to the highest standards in this respect and asked all participants to do the same.

The need to respect human dignity guided each and every interaction during this research. I examined every interaction and every piece of information that I gave the research participants to ensure as much as possible that there was nothing that they could misconstrue as offensive. I also did my best to create an open relationship with all participants with the intention of making them feel comfortable in speaking to me about any potential issues that may have arisen.

I did not expect that this research would be unjust in any way; however, once again it was important that I be aware of this possibility at every stage of the research to avoid it. To accomplish this, I ensured that I included all participants in all sections of this research if they requested that I do so, provided that their participation was appropriate for the given stage.

I made every attempt to create benefit and value from this research and to minimize any harm. I began this study with the knowledge that a potential result of action research is change and that not everyone involved would consider this change positive. Therefore, I will attempt to include in the change process those who will be affected by the change.

I was also cognizant of my personal biases during the conduct of this research. I began this research with a history in experiential training and previous experience with Medcan. I designed the Values Session and have facilitated it for many Medcan employees. Because of these factors it was crucial that I remain neutral in receiving and

reporting the data and ensure that I presented an unbiased front to make the research participants feel comfortable in telling me what they thought about the program.

CHAPTER FOUR – RESULTS AND CONCLUSIONS

Introduction

This chapter will present the data that I collected to form the basis of this research. I collected the data from pre- and post-focus group sessions and personal interviews. The following results and conclusions are based on research into the following question: How does an experiential training program influence the understanding of corporate vision and values? I also used the collected data used to answer several subquestions: Prior to their participation, what do the participants understand about the use of experiential training, and what do they expect to gain from their participation? In addition, after their participation, how do the participants describe the experiential training experience, and what perceived value have they gained from their participation?

This chapter will present the findings from each phase of the research separately, and, based on these findings, I will present the conclusions at the end of the chapter.

Project Findings

Focus Group 1

The first focus group was open to Medcan employees who had not previously participated in a Values Session. The goal of the first focus group was to attain a pre-session understanding of the participants' knowledge of the Values Session and the use of experiential training in this session.

In all, 17 individuals fit into this category, all of whom were new employees at Medcan. Their range of tenure varied from two weeks to four months. Of the 17 possible participants, 4 volunteered to be a part of this research.

This focus group session, which lasted approximately one hour, took place at the Medcan office in a private meeting. All volunteers were present, and I took notes on a flipchart. I will represent the participants throughout this chapter by using fictitious names to ensure anonymity.

The following themes emerged from each of the questions that I asked during the focus group session:

1. What is your understanding of the objective of the Values Session?
2. What do you expect to gain from your participation in this session?
3. What is Medcan's vision?
4. What are Medcan's values?
5. What is your understanding of an experiential training program?

Question 1 Theme: Team Building, Values and Secretive Experience

Several themes emerged from the first focus group question: What is your understanding of the objective of the Values Session? The study participants saw the Values Session related to team building, was a presentation of corporate values, and was a secretive experience.

Team building. The focus group participants felt that the Values Session was intended as a team-building event, the purpose of which was to encourage teamwork, trust, communication, collaboration, and support networks in a fun and motivational manner. This theme can be seen in comments such as the following: "I expect that this will be a team-building exercise that will give us an opportunity to build trust among co-workers who do not know each other well" (Sally); "I have been to sessions like this before. They are intended to help us work better as a team and to increase levels of trust"

(Jim); “Through having fun together we will enhance our level of communication, trust, and teamwork” (Susan); and “The Values Session is designed to be a rah-rah event to increase teamwork and trust” (Dave).

Values. Because of the title *Values Session*, many of the study participants assumed that it would involve a presentation of Medcan’s values. Not everyone saw this in a positive light, and based on past experience, some thought that it might lead to a less than exciting experience. This theme is evident in the following comments: “I think much of the session will be a lecture-based presentation about the company values, and it may be a little boring” (Dave); “I thought the Values Session was maybe created for your [my] master’s research and was a presentation of how values play a part in corporate life” (Susan); and “It’s called a Values Session; it’s about Medcan values” (Jim).

Secretive experience. All of the participants agreed that there was little available information about the purpose and content of the Values Session. They felt that this was purposeful and that they were required to keep their experience a secret once they had participated in the session. This theme can be seen in comments such as the following: “It seems almost like a cult. Nobody will tell me anything about it except that I will like it and that it is difficult to explain” (Jim); “Everyone told me that that they could not tell me what it was about, but that I would have fun” (Sally); “I was told that it was about Medcan values, it was fun, that I should keep an open mind, and to dress casual” (Dave); and “I don’t really know anything about it. I was told I would find out when I get there” (Susan).

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up the study participants' understanding of the Values Session prior to their attendance:

The Medcan Values session is a fun team-building experience designed to enhance trust and teamwork while introducing employees to Medcan's values. The best way to experience this session is to go with little prior knowledge of the day's events or content.

I then e-mailed this statement to the study participants for verification for accuracy.

Question 2 Theme: Medcan Values and Team Spirit

Two main themes emerged from the second focus group question: What do you expect to gain from your participation in this session?. The study participants felt that they would learn more about Medcan's values and feel more like a team.

Medcan's values. Based on the title of the session, the study participants all felt that the session had to be related to corporate values and that they would therefore emerge from the session with a greater understanding of those values, their source, the reason for their existence, and their meaning. This theme is revealed in comments such as the following: "I hope I learn the Medcan values. I have seen them, but don't remember them and want to know more about where they came from and what to do with them" (Sally); "I want to learn how the Medcan values affect me and the work I do" (Jim); "I hope to learn how I can use the Medcan values to be a better team player and to provide better customer service" (Susan); and

I have read the Medcan values, but don't really know how they fit into the job I do. I hope to better understand how I can use the values as a tool to make Medcan a great place to work and a place where our customers feel we are doing everything for them we can. (Dave).

Team spirit. All of the study participants reported that they do not often feel part of a larger Medcan team. Each department interacts as a mini silo, and even though interconnected departments interact, this connection does not create the feeling of belonging to one big team. The participants felt that they interacted well within their own department, which often resulted in high performance, but that this did not translate into a team feeling beyond their department. This can be seen in the following comments: “I hope to meet others outside my department and to build a sense of team with them. That way, if I have a question for a different department, I will have a contact to talk with”; (Sally); “Through this day I hope that I walk away knowing more about Medcan and what we do, and I want to feel positive about my role in creating this” (Susan); “I want to have a fun day away from the office and to get to know more people from work” (Dave); and

I am new here and have not had a chance to get to know too many people, or even what the other departments do here. I hope to learn more about Medcan and the people here and to start to feel like I am part of the team. (Jim)

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up what the study participants hoped to gain from their attendance at the Values Session: “When I attend the Values Session I hope to learn more about Medcan’s values, what they mean, and how I can use them to create a greater feeling of team among all Medcan employees.” I then e-mailed this statement to the study participants for verification for accuracy.

Question 3 Theme: Lack of Clarity of Medcan Vision

One main theme emerged from the third focus group question: What is Medcan’s vision? The volunteers who participated in this first focus group session were unclear

about Medcan's vision. They were also confused about the difference between a mission and a vision statement, and some reported that they had seen different vision statements but did not know which one was current. This theme is evident in the following comments: "I'm not sure what our vision is. I think it is Keeping Busy People Healthy, but I'm not totally sure" (Sally); "I think it might be 'The premier preventative health company in North America'" (Jim); "I don't know" (Susan); and "It is something about first- or world-class customer service" (Dave).

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up what the study participants considered Medcan's vision: "The Medcan vision is to keep busy people healthy while providing world-class customer service." I then e-mailed this statement to the study participants for verification for accuracy.

Question 4 Theme: Lack of Clarity of Medcan Values

One main theme emerged from the fourth focus group question: What are Medcan's values? The volunteers who participated in this first focus group session were unclear about Medcan's values. They were also confused about the difference between mission and values, and most could not explain the difference. All felt that they had seen them, but they did not remember them because there were too many. This theme can be seen in the following comments: "I know there are a bunch of them. I think one is to provide the best patient care possible, but I could be wrong" (Sally); "I think many of them relate to customer service and providing a positive patient experience" (Jim); "One of them is related to ethical behaviour and conduct, which is obviously very important in our field of work, but I could not quote it" (Susan); and "Medcan is always trying to stay

on the leading edge of technology and diagnosis, so I know one of them is related to cutting-edge innovations and technology” (Dave).

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up what the study participants considered Medcan’s values: “The Medcan values relate to customer service, patient care, excellence and innovation, and ethical behaviour; but we cannot recite any of them word for word.” I then e-mailed this statement to the study participants for verification for accuracy.

Question 5 Theme: Nontraditional Approach, Activity Based, Case Studies, Silly Games, Not Relatable, and Run-On

Six main themes emerged from the fifth focus group question: What is your understanding of an experiential training program? Three of these themes can be considered positive and three as negative in nature or cautionary.

The three positive themes that emerged through the first focus group session were that the program is not a traditional approach, that it is activity based, and that it involves case studies. Overall, the participants were looking forward to the experiential nature of the session. They had heard positive comments about it from others who had already participated, and all had participated in an experientially based training session that had gone well at some time in the past.

Not a traditional approach. The study participants unanimously identified an experiential training program as nontraditional. They believed that a traditional training program utilizes a lecture-based approach, workbooks, and PowerPoint presentations; whereas an experiential training program does not. This theme is revealed in the following comments: “An experiential training program is active. We won’t be sitting

around a meeting room listening to someone telling us what is right and what we should be doing” (Sally); “It will not be a textbook-based training. We won’t do a lot of reading and a lot of talking. We will learn through experiencing different team challenges” (Jim); “An experiential training program usually takes place outside and is fun. It is not like a standard training session with books, reading, and lecture” (Susan); and

It’s kind of like an Outward Bound course. People are placed in challenging situations based on a scenario, and they need to figure out how to solve the problem. We will then talk about why we did the things we did and what it means about our level of teamwork. (Dave)

Activity based. All of the volunteers from the first focus group session felt that the main identifying feature of an experiential training program is that it consists of a series of activities as a teaching vehicle. They felt that experiential training is active and physical in nature, that it usually takes place outdoors, and that it involves challenging and sometimes risky activities. This theme is illustrated in the following comments: “The ones I have been involved with in the past have presented a bunch of activities and challenges that we had to overcome as a team” (Sally); “Experiential training programs take place outdoors, are fun, and involve a bunch of team games” (Jim); “It’s going to be fun and active and will likely involve activities that make us think outside of the box and that are somewhat physical” (Susan); and “They usually consist of a bunch of team games that look at how we communicate, trust one another, and solve problems” (Dave).

Case studies. Several of the study participants felt that an experiential training program would involve the examination of case studies. Case studies are often used to present a real-world or fictional situation that the training participants are required to examine and discuss. From this they either determine what actions they would take or

discuss the positive and negative actions of the people involved in the case study example. This theme is evident in comments such as the following: “I think we may look at real-life cases and learn from them. It will be a case-management type of training as opposed to theory-based training” (Sally); and “It should be pertinent to our field of work at Medcan, present real-world cases, and be directed to goals that we will have at work” (Jim).

The three potentially negative themes that emerged from this question were that the program involves silly games, is not relatable, and is run-on. The participants were all concerned that the session be of value to them. They are very busy people and did not want to waste their time in a training session that did not relate to them and had no obvious work-related application. The participants made most of these comments with a humorous undertone, but I sense some real concern in them. They could have resulted from a negative past experience, from a story that they had heard about a past experience, or from a lack of concrete understanding that created a cautious mindset.

Silly games. The research participants were somewhat concerned that some experiential sessions might involve silly games and that these sessions might be “hokey” if they are not conducted properly. Some had been involved in or had heard about experiential training sessions that involved camp games that, although they were fun and entertaining, had no relevance to their everyday lives. This theme is revealed in the following comments: “As with any training I hope this is not a waste of time. I especially hope it is not silly and makes us do a lot of embarrassing stuff” (Sally); “I think experiential training can be pretty ‘hokey’ if it is not done well” (Jim); “I have done it before when it has been like a team Olympics thing, and it was a little silly. I wondered

what value it had beyond being fun” (Susan); and “I hope it’s not a bunch of camp games. My son has a great time at camp, but I’m beyond that” (Dave).

Not relatable. All participants were concerned that the session relate to them and their developmental needs. They did not want to participate in a training program that was fun, but had no relevance to their work or personal world. They considered this type of program recreational or entertaining and did not equate it with a training experience. This theme is illustrated in the following comments: “I think fun team-building sessions can be great, but if this is going to be a training session, it has to have relevance to what we do and make us better at it” (Sally); “If it does not relate to what I do, I would feel it is a waste of my time” (Jim); “I want it to be work related and not just about having fun. I am relatively new here, and I want to really learn how to do things right” (Susan); and “I am a little afraid that an experiential training session will not provide any concrete information on topics that are important to me, such as problem solving, conflict resolution, and change management” (Dave).

Run-on. The participants referred to an activity that produces the desired result, but continues to go on and on as *run-on*. Some felt that many experiential training programs evolved from youth-based programs and did not take into account the ability of adults to grasp meaning from a situation faster. This theme can be seen in comments such as the following: “I have been involved in really long scenario-based programs before that required me to play a game for hours. I got the point in the first twenty minutes and did not feel I needed to keep playing” (Jim); “Once I get it, I’m ready to move on. I don’t want to learn the same lesson a million different ways” (Susan); and “I think that

sometimes all the activities can be basically the same. The objective may be different, but the lesson is the same. I hope there will be more variety” (Dave).

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up how the study participants described an experiential training program:

Experiential training is a nontraditional form of training that involves learning through doing rather than learning through reading or talking. Experiential sessions are comprised of a series of fun and active initiatives that may take place outdoors and have relevance in helping us understand how we interact together.

I then e-mailed this statement to the study participants for verification for accuracy.

Focus Group 2

The second focus group was open to all Medcan employees who had previously participated in a Values Session. The goal of this second focus group was to attain a post-session understanding of the participant experience.

Approximately 110 individuals fit into this category. Of these, 6 volunteered to be a part of this research and participated in my second focus group interview. Three of these volunteers had also participated in the first focus group session, and their participation would produce pure feedback because they had not had an opportunity to supplement the knowledge that they gained from the Values Session with knowledge that they gained while back at work.

This focus group session, which lasted approximately one hour, was held at the Medcan office in a private meeting. All of the volunteers were present, and I took notes on a flipchart. The participants are represented throughout this chapter by fictitious names to ensure anonymity.

The following themes emerged from each of the questions that I asked during the focus group session:

1. What benefit did the Values Session provide to you?
2. How would you describe the experiential approach?
3. What is Medcan's vision?
4. What are Medcan's values?
5. Do you have a greater understanding of how you can live Medcan's values?
Please explain.
6. Do you feel that your participation in the Values Session has enhanced your level of commitment to and engagement with Medcan?

Question 1 Theme: Team Building, Customer Service, Medcan Information, and Pre-Package

Several themes emerged from the first focus group question: What benefit did the Values Session provide to you? The study participants felt that the value of the session was related to team building/customer service, Medcan information, and the pre-package.

Team building/customer service. The focus group participants felt that the Values Session provided a great opportunity to build a strong team that resulted from the development of personal relationships that created an at-work support network and their greater understanding of team evolution and dynamics. The participants also reported that the session highlighted the importance of customer service for internal and external customers. This theme is revealed in the following comments: "I am new to the team and do much of my work alone. This session helped me to feel part of the team" (Dave); "Even though I know many people at Medcan, this session made me feel closer to them

as a team. We had a powerful experience together, and I believe our relationship has changed because of it” (Amanda); “I always felt that we worked well together as a team and that we did not have any real performance or relationship issues, and this session reinforced this belief. It also made us stronger as a team” (Jane); and

Since I am pretty new at Medcan, I did not know anyone outside my department. The Values Session allowed me to meet people from many different departments and to learn how they fit into the Medcan team. I now feel I have contacts to answer questions that are beyond my scope of knowledge. . . . I feel we are a much stronger team because of this session. (Sally)

This session really made me focus on how I interact within a team, to question why I do what I do and how I do it. As a result, I think I know how to be a better team member and how to build a stronger team with the people I work with. (Jim)

It all comes down to customer service, and not just who we traditionally see as our customers; we need to focus on pleasing internal as well as external customers. This session highlighted this for me. I knew this before, but had never really thought of it this way. (Sarah)

Medcan information. Everyone who attended the Values Session reported leaving with a much greater understanding of the history of Medcan and the direction in which the company was heading. This helped them to better understand the company’s vision and values. The participants also indicated that they understood the health care industry better after the session. Much of this learning occurred during Mr. Francis’s presentation. This theme is evident in the following comments: “Because of the Values Session I know much more about Medcan and our values. I have a little more insight into where they came from and how they will play into the future of the company” (Sally); “I did not know who else was out there and how Medcan was different. This has helped me to differentiate what we do and to give me a clearer focus of what I need to do” (Jim); “I didn’t really know much about the Medcan values before this session. I still don’t think I

know them as well as I should, but this was a great start. It needs to be somehow continued on a daily basis” (Sarah); “The session did a good job to reinforce our values, but it did not go far enough. We need more exposure if we really want them to become a part of our lives” (Dave); “Shaun’s [Mr. Francis’s] session was interesting. I learned about the Canadian health care field and how we fit into it. This will help to give me a better vision of what I need to do in the future” (Amanda); and “I knew the Medcan values before this session, and I don’t think I know them any better now; however, I do now understand what they mean and how they translate into actions and behaviours” (Jane).

The pre-package. This was not a direct benefit of the session, but rather a detraction. The participants complained that the pre-package contained more reading than necessary and questioned whether all of it was necessary or related, especially because little of it was discussed during the session. They also questioned the overall theme of the pre-package and whether it reflected the real intentions of the session. This theme is illustrated in the following comments: “I felt there was too much reading before the session. I did not have time to read it all and felt bad. I was also worried I may be questioned about it” (Sally); “When I looked at the pre-information, I was unsure what the focus of the session would be. It ended up quite different than I expected” (Jim); “When I saw the package I thought I was in for something really tough and scary. I was a little hesitant to go” (Sarah); “I found the reading mostly interesting, but I am unsure how they all relate to me and my job at Medcan” (Dave); and “The reading was more than I could do. I thought it may relate to my participation and success in the session, but was relieved to find that it played only a small part in the session” (Amanda).

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums the benefits of the Values Session to the participants:

Through my attendance at the Values Session I feel I am better connected to my teammates and have built some strong relationships outside my department. I also feel I know much more about Medcan history, values, and vision. I did, however, find the pre-package difficult to read and questioned the theme presented.

I then e-mailed this statement to the study participants for verification for accuracy.

Question 2 Theme: Hands-On Experience

One main theme emerged from the second focus group question: How would you describe the experiential approach? The study participants described the experiential approach to training as a hands-on experience that gave them an opportunity to learn more about themselves, their group dynamics, and the skills and tools being discussed.

Hands on. The participants agreed that experiential training involves active participation and not passive observation. It is not based on a traditional classroom lecture-based model, but may include more traditional components. The participants described it as a laboratory in which they could experiment and learn about teamwork and leadership. This theme is illustrated in the following comments: “It is a hands-on session, and the main focus is on building trust and relationships through activity” (Sally); “The experiential approach presents an activity or team challenge that, through the doing of the activity, solidifies the learning” (Jim); “It is a hands-on experience and not a classroom lecture” (Sarah); “It provided an experience or challenge that the team must struggle through in order to be successful in the end. This is where the learning and insight come from” (Dave); “The team collectively learns through a trial-and-error

experience” (Amanda); and “We learn through doing. We work together as a team to discover a solution and then analyse how we interacted” (Jane).

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up how the participants described an experiential approach to training: “An experiential approach to training involves team activities that take place outside a normal classroom environment. Through these activities the team gains insight into their group dynamics and enhances their learning and application of relevant tools and skills.” I then e-mailed this statement to the study participants for verification for accuracy.

Question 3 Theme: Lack of Clarity of Medcan Vision

One main theme emerged from the third focus group question: What is Medcan’s vision? The volunteers who participated in this second focus group session were still unclear about Medcan’s vision, but they were able to narrow it down to a couple of options. They were still confused about the difference between a mission and a vision statement, and some lamented that there were still competing vision statements and that they did not know which was the real one. This theme can be seen in the following comments: “I still think it is Keeping Busy People Healthy, but it could be related to customer service as well” (Sally); “Keeping Busy People Healthy” (Jim); “To be the number one customer service company in Canada, but Keeping Busy People Healthy also could be it” (Sarah); “Keeping Busy People Healthy” (Dave); “I’m pretty sure it is Keeping Busy People Healthy” (Amanda); and “Keeping Busy People Healthy” (Jane).

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up what the study participants considered

Medcan's vision to be: "The Medcan vision is to Keep Busy People Healthy while providing world-class customer service." I then e-mailed this statement to the study participants for verification for accuracy.

Question 4 Theme: Need for Additional Clarity of Medcan Values

One main theme emerged from the fourth focus group question: What are Medcan's values? The volunteers who participated in this second focus group session were clearer about Medcan's values, but they were unable to list them all. The Values Session seemed to have had a positive influence on their recognition and retention of the values, but they were still a long way from listing all seven as they are written. This theme is revealed in the following comments: "They focus on customer service, but I can't remember them all. I know one is that we will make a difference with our clients" (Jim); "I know 'we are empowered and respect each other' and 'we are ethical'" (Sarah); "'Rewarding our shareholders and being innovative' is also in there" (Dave); "I think all of the ones I know have been listed. I don't know if they are all there or if some are missing" (Amanda); "There is one more about serving our community and volunteering" (Jane); and

I feel I know what they are and know where I have seen them at work, but I still struggle to list them all. The ones I know are "We practice excellence and innovation," "We serve the community," "We are ethical." (Sally)

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up the study participants' knowledge of Medcan's values: "The Medcan values relate to customer service, patient care, team empowerment, excellence and innovation, serving our communities, rewarding our

shareholders, and ethical behaviour; but we cannot recite any of them word for word.” I then e-mailed this statement to the study participants for verification for accuracy.

Question 5 Theme: Reinforcement and Temporary Enhancement

Two main themes emerged from the fifth focus group question: Do you have a better understanding of how you can live Medcan’s values? Please explain. These two themes are related to reinforcement and temporary enhancement. The participants understood Medcan’s values better, but because of their busy work environment, they found it difficult to decide how to incorporate the values into their daily lives and sometimes even forgot to even think about them. The values became a subconscious part of their interactions, and they did not think of them consciously to direct their behaviours and actions. The participants considered this enhancement temporary because of a lack of reinforcement and the fast-paced environment in which they worked.

Reinforcement. The study participants were unanimous in stating that they understood Medcan’s values more and could envision how they would translate into some actions. However, they felt that they needed more visible reinforcement in the workplace for two reasons. First, they needed to be exposed to the values on a regular basis if they were to truly memorize them; and second, if the values were not evident constantly in everything that Medcan did, the employees would feel that the company did not support the values and that, therefore, they were not required to do so either. This theme is demonstrated in the following comments: “I know what they mean, even if I cannot recite them all. If I were to learn them, I would need more exposure to them. Perhaps a desk-top card or something like that would help” (Sarah); “I think I would learn them better with more exposure. I know they are on the Web site, but having a

poster or something like that would also help me” (Amanda); “I need to see that the values are important to others and that they are doing something about it. If nobody else seems to care, there is not much incentive for me to” (Jane); and

When I left the Values Session I felt I had a much better understanding of who Medcan was and my role there. I also felt I understood the Medcan values and knew how they would help me to do my job better. But once I got back to work, I found I could not remember all the values without looking them up, and since I don’t have a lot of free time, I find this difficult to do. (Sally)

I feel I know our values pretty well, but if they are not reinforced visually and through actions, I will begin to slip as well. I need to know they are important to Medcan and that everyone feels the same way. (Jim)

Even though I feel I know our values better, I still need more examples of how I can live them. Maybe if we had departmental or team meetings to discuss how the values related to our team or department, we could develop specific actions and behaviours that would represent the values for us. (Dave)

Temporary enhancement. Everyone involved in the Values Session reported leaving the session on a high emotional level. They all believed that they were better employees and team members than when they arrived. They had been inspired to look at all team and personal interactions differently and to do their part in creating a high-performance team environment. However, once back at work, they found that this “high” began to fade as a result of the realities of the work environment. Many contended that maintaining this enhanced level of performance requires internal reinforcement and consistent team training. Nobody expected the high level of performance to last forever, but they felt that it could be sustained longer and at a higher level with continued focus. This theme is illustrated in the following comments:

When I left the session, I felt I had developed a strong relationship with the people I participated with. Once back at work, however, I did not have a chance

to see these people, and the relationship began to fade a bit. It would be good if there were some way to stay in contact with the people from my session. (Sally)

I had the opportunity to really get to know the people on my program through the coat-of-arms exercise and the high ropes. It would be great if I had this same experience with the people I work with every day. The great sense of relationship I had when I left the program was not the same as the relationship I had with my direct team members. (Jim)

When I first got back to work, I tried to think about the values and how I could use them to be better at work, but as time went by I thought about it less and less. Without any direct reinforcement or having them tied to my performance review, they slowly faded into the background. (Sarah)

When I left the program I was on a high. I felt really good about myself and the Medcan team. I was communicating better and working in a more deliberate way. But I soon found I fell back into my old habits. I wish I knew how to keep it up. (Dave)

I always felt that the values were present, even if I did not know exactly what they were. I think I still do everything basically the same as I did before, but I have a greater awareness of what role I play in the success of Medcan. (Amanda)

Since the Values Session seems to be a bit of a secret, nobody told me what to expect when I return and what I am supposed to do. People do not want to spoil the surprise of the activities, and I think this may suppress some of the other stuff as well. (Jane)

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up how the study participants understood and turned Medcan's values into action:

I have a greater understanding of Medcan's values after the program, but I am still a little unclear on how to turn them into action. I am afraid that if I do not use them immediately after the session, I will begin to lose my focus on them and go back to interacting the way I did before I attended the session.

I then e-mailed this statement to the study participants for verification for accuracy.

Question 6 Theme: Enhanced Commitment

One main theme emerged from the sixth focus group question: Do you feel that your participation in the Values Session has enhanced your level of commitment to and engagement with Medcan? The participants all felt that the session enhanced their level of commitment to and engagement with Medcan. However, they suggested that there was a greater increase in commitment to their team and each other than to Medcan as a company. This theme can be seen in the following comments: “Yes, I do think I am more committed to Medcan than before. I see it as part of an ongoing commitment to the team, and this makes me feel that Medcan cares about me and my development” (Sally); “I think the session reinforced the importance of customer service for both internal and external customers. This made me feel better about Medcan because I felt that the leadership team cared about this” (Sarah); “I think the session reflects upon the people more than upon Medcan. I was glad Shaun [Mr. Francis] was there. It showed that as president he supported us and our development at Medcan” (Amanda); and

I do feel an enhanced commitment, but I think it is more towards my co-workers than to Medcan. Medcan is a company that is made up of people, and if I feel more committed to them, then I guess I will also feel more committed to the company. (Jim)

I feel I am part of a stronger team because of the session, and everyone wants to be a part of a strong team. I think I would be less likely to change jobs if I felt I was already on a great team. (Dave)

It was a wonderful opportunity, but I wonder if some people take it for granted. I mean, most companies do this type of thing, and many people just expect it. I don't know if this might impact upon how seriously they take it. (Jane)

Upon reviewing the themes that emerged from this question, I developed the following conclusion statement that sums up whether the Values Session enhanced the

level of commitment to and engagement with Medcan: “Yes, the session definitely enhanced my level of understanding, commitment, and engagement to Medcan. However, it reflected more upon the people than the company.” I then e-mailed this statement to the study participants for verification for accuracy.

Personal Interviews

I hoped that the personal interviews would lead to recommendations based on the revised focus of the Values Session. For this reason, I have included the data from these interviews in chapter 5.

Data Analysis and Direction

Once I identified and validated the themes from each of the two focus group sessions, I presented the data to Mr. Francis through e-mail and telephone conversations. We discussed the meaning of the data and how they reflected the Values Session. The main theme was that the session was no longer meeting the original objectives of the program.

When the Values Session was first designed, its purpose was to introduce the entire company to the revised company vision and values and to place a developmental focus on team interactions. This was accomplished through a roll-out to all employees.

Over the last two years the program had evolved into something different than its original concept. The vision and values are still present, but because the session is now used as an orientation for new employees, the content has changed to include a stronger emphasis on Medcan’s history and place within the Canadian medical system. This addition has diminished some of the emphasis on the vision and values.

I suggested that we had two choices: (a) If the original objectives and theme of the session were to be the current focus, then the session content had to change to reflect this; and (b) if the current content was in line with the objectives of the program, then perhaps the title of the session needed to change to more accurately reflect this. Upon further discussion, my sponsor decided that the current content accurately reflects the goals and objectives that Medcan hoped to achieve through the Values Session. The title of Values Session would remain, but the meaning would change to reflect what Medcan values in teamwork and client service and not focus as directly on the Medcan values.

Mr. Francis stated in an e-mail:

I think we should continue to call it the Medcan Values Session but I will put more emphasis on “Making a difference every day with our clients, each other, and ourselves.” This is a summary values statement which I have started to use which I think will be easier to remember. I think our session covers this statement quite well.

This new focus will provide direction in modifying future Values Sessions. I will incorporate the modified values statement into future sessions and revise other material and the general outline to achieve this new focus.

Project Conclusions

This section will explain my research conclusions based on my original research questions. I arrived at these conclusions after careful examination of the collected data and through discussion with Mr. Francis and all of the study participants. I will examine each of my research questions independently and present my conclusion and my reason for this conclusion.

Conclusion 1: There is a Positive Influence on the Participants'

Understanding of Medcan's Vision and Values

My first conclusion is based on my main research question: How does an experiential training program influence the understanding of corporate vision and values?

As demonstrated in the focus group sessions, I have concluded that this particular experientially based training session has had a limited, but positive influence on the understanding of Medcan's company vision and values. However, this has resulted from the content and facilitation of the session and not necessarily the format. Experiential training in itself will not create the desired results, but the content and facilitation of the session will.

Based on the participants' descriptions of the session as *fun, exciting, challenging, educational, engaging, and motivational*, I have concluded that they enjoyed the experiential format. They reported that the session helped them to better understand Medcan's company vision and values through the integration of experiential activities and the vision and values content. However, the participants suggested that the session enhanced team development to a greater degree than it enhanced the understanding of the vision and values, which is reflected in the following conclusion statement: "Yes, the session defiantly enhanced my level of understanding, commitment, and engagement to Medcan. However, it reflected more upon the people than the company."

This research conclusion also supports the findings of Alliger and Janak (1989), Bronson et al. (1992), Priest and Lesperance (1994), Biseda et al. (2004), and Bretz and Thompsett (1992), who reported positive correlations between experiential training and participant learning and development.

*Conclusion 2: Pre-session: There Is No Clear and
Unified Description of Experiential Training*

My second conclusion is based on the subquestion, Prior to their participation, what do the participants understand about the use of experiential training, and what do they expect to gain from their participation? Based on the conclusion statement,

Experiential training is a nontraditional form of training that involves learning through doing rather than learning through reading or talking. Experiential sessions are comprised of a series of fun and active initiatives that may take place outdoors and have relevance in helping us understand how we interact together,

and because each participant described it differently, I have concluded that these participants did not have a clear or unified understanding of experiential training. Nor did they have unified expectations from this session.

In generalizing, I have concluded that the participants described experiential training as action based but that their definition of action based was different. This means that an experiential session would include team and personal challenges, activities, games, simulations, or case studies.

I have concluded from this study that the participants expected to achieve a greater level of team performance and to build stronger relationships through their participation in an experiential training session.

*Conclusion 3: Post-session: The Participants Saw
the Experiential Session as Positive*

My third conclusion is based on my subquestion, after their participation, how do the participants describe the experiential training experience, and what perceived value have they gained from their participation?

I have concluded that post-session the participants in this study saw their experience in this experiential session as very positive. Words such as *valuable*, *fun*, and *memorable* sum up the general consensus of the participants.

The participants identified the main benefit of their participation in this session as the development of a stronger team, which is reflected in the conclusion statement:

“Through my attendance at the Values Session I feel that I am better connected to my teammates and have built some strong relationships outside my department.” Through this session the participants felt that they built new relationships and enhanced existing ones, while at the same time enhancing their ability to communicate, problem-solve, and interact with others.

This research conclusion also supports the findings of Alliger and Janak (1989), Bronson et al. (1992), Priest and Lesperance (1994), Biseda et al. (2004), and Bretz and Thompsett (1992), who all reported positive correlations between experiential training and team development.

Scope and Limitations of Research

The findings of this research are applicable only to Medcan and cannot be generalized to other organizations in the same or similar industries. Within Medcan, the conclusions of this research cannot be generalized to all employees, but the information gathered can be used as a sample to guide future training sessions.

Because of the relatively small number of research participants, this study represents only their views and perceptions. Although it can be assumed that they presented a somewhat common voice, their views must be taken as only a sample. This sample can be used to modify the Values Session, but there must be continuous follow-up

to determine whether the changes that are implemented as a result of this research have had a positive or negative impact on future Values Sessions.

This research complements the research on experiential training and the power of company vision and values, but the data that I collected and the conclusions that I have drawn cannot stand alone. This research must be considered only one view, and other studies must be examined to gain a thorough understanding of the current trends in this area.

As the researcher in this study, I also need to reflect upon my influence over the data that I collected. I have been involved in the Values Session since its inception, I was involved in the original design and have facilitated all Values Sessions to date, and I have interacted with most Medcan employees over the last few years. Although I feel that the study participants offered honest and accurate feedback, I must be aware that they might have presented biased views. They might have felt compelled to provide positive feedback because of our previous interactions and my involvement as the Values Session facilitator.

CHAPTER FIVE – RESEARCH IMPLICATIONS

Introduction

The following chapter presents my recommendations based on this research. The goal of these recommendations is to enhance the current Values Session. I will outline the study participants' recommendations and those that I have developed based on my learning through this research. I will then outline a detailed plan to implement each of the recommendations, the implications of not implementing the recommendations, and what will be required from a leadership standpoint to achieve the goal.

Project Recommendations

This section presents the study participants' and my own recommendations to enhance the value of the Medcan Values Session.

Once I had determined, in consultation with Mr. Francis, the future direction of the session, I sent an e-mail to each of the study participants to inform them of the conclusions and the Values Sessions' future focus. In this e-mail I asked for their recommendations to meet this new focus and any general recommendations that would help the session to be of more value to them. The areas on which I asked them to focus were the pre-session information, the session follow-up, Medcan's vision, Medcan's values, the session's application, and their commitment to Medcan. I wanted to elicit their thoughts as participants in the session because they viewed it through a different lens than I did as the facilitator. Of the six study participants whom I approached for recommendations, two responded.

I also include my personal recommendations in this section, which I will present to Mr. Francis, and we will determine how to work them into future Values Sessions.

*Participant Recommendation 1: Sally: Include a Clear Statement
of Vision and Values in the Pre-session Information*

The following is the feedback from Sally, who participated in both focus groups.

Pre-session information: Sally recommended that Medcan include a clear statement of the vision and values in the pre-session information to form a baseline of understanding, that the pre-reading be concise and relevant to the session, and that a brief history be added that includes the focus, goals, and development of the session.

Follow-up: Sally recommended that the team convene one month, three months, and six months after the session to talk about what they learned at the event, what they have learned since, how the session might have been different from what they expected, how successful they think they are in living the values, and how they think Medcan can better live the values. This session will allow Medcan to gain insight into how the new hires feel that the organization is living its vision and values.

Medcan vision: Mr. Francis gives an excellent talk on Medcan history and vision during the Values Session, and Sally had no recommendations on this theme.

Medcan's values: Sally recommended that each of the experiential activities be linked to one of Medcan's values and that each value and its direct application to the workplace be discussed.

Session application: Sally recommended that some form of extra credit be offered to anyone willing to present at the town hall meetings on how he or she is living Medcan's values. This could even be a mandatory assignment for all Values Session participants.

Commitment to Medcan: Sally recommended that the values learned in the Values Session be lived so that commitment comes naturally. She felt that Medcan does an excellent job of providing teambuilding training, social events, and other team events that build commitment; and she reported that employees constantly talk about having enjoyed the Values Session and about the other team events that Medcan offers, which makes working for Medcan unlike working for any other company.

Participant Recommendation 2: Jim: Provide Participants With a Greater Understanding of the Values Session Prior to Their Attendance

The following is the feedback from Jim, who participated in both focus groups.

Pre-session information: Jim recommended that the participants be informed about the Values Session before it takes place to better prepare them and allow them to gain more from the session. He felt that the participants had been kept “in the dark” about the session, which limited their expectations personally and from the session.

Follow-up: Jim had no suggestions for the session follow-up.

Medcan’s vision: Jim felt that Mr. Francis offered thorough insight into Medcan’s history and how the company vision was created.

Medcan’s values: Jim saw the Values Session as an excellent introduction to Medcan’s values and reported that the action plans helped to relate them to daily action. Jim recommended that these values be lived in the workplace every day to reinforce the company values.

Session application: Jim recommended that, after the program, the action plans developed during the session be followed up to ensure that the participants are actually doing something with what they have learned.

Commitment to Medcan: Jim felt that just by attending the Values Session, his commitment to Medcan had increased. The session introduced him to many new people and confirmed the quality of the people whom Medcan hires.

I have developed the following recommendations through careful consideration of the direction of the session, the current content, and how I perceive the participants' experience. I have based these recommendations on the feedback from the focus group sessions. My goal is to enhance the areas that are already producing positive results and to transform any negative aspects of the program into positive value.

The areas that I have identified for recommendations are the pre-session information, the session follow-up, Medcan's vision, Medcan's values, the session's application, and commitment to Medcan.

Researcher Recommendation 1: Pre-session Information Needs Enhancement

The participants in the focus group session identified this area as requiring some modification. They had little understanding of what the Values Session is and why they were requested to participate and complained that the pre-package contained too much reading and did not clearly convey the focus and objectives of the session. For this reason, I recommend that the pre-session information package be reviewed and revised and that further measures be put into place to ensure that the participants in this session attend fully aware of what the session involves, why they are attending, and what they can expect to gain from their participation.

Researcher Recommendation 2: Continued Follow-Up Is Required

Many of the participants commended that the momentum begun at the session needs to be maintained. I recommend that the participants have access to two post-

session follow-up support structures. The first is a meeting with their direct supervisor to discuss their learning from the Values Session and to develop and follow up on an action plan; the second would involve a team meeting with all of the participants from a specific Values Session. The team could continue their team development, discuss learnings and challenges, or work on specific projects. Not only will this build strong team relationships, but it will also reinforce the importance of teamwork and the learning that took place at the Values Session.

Researcher Recommendation 3: Medcan Vision Clarification

A company vision can be an extremely powerful tool or just a collection of meaningless words; the difference is in how the vision is used. Medcan's vision could present an excellent opportunity for Medcan leaders to guide its development as an organization and the interaction of internal teams and customer service. Medcan is currently on this path and is realizing success. However, as with anything, even success can be improved upon.

I therefore recommend that Medcan continue to focus on using its vision to guide the development of the company, decisions, and all internal and external interactions. First, Medcan must clarify its vision and convey it to all team members on a regular basis. They also need to know how to translate the vision into performance and results. For a vision to be effective requires that the team members know what it is, why it exists, what the intended results are, and how to translate it into action; and, ultimately, they need to care enough to do something about it. I recommend that the what, the why, and the how be explained in the Values Session as well as in all interactions at work.

Ensuring that team members care about the vision is another challenge. Medcan needs to earn commitment and loyalty from each employee, and this can be achieved in part through the Values Session and other training events, but most directly through the way in which Medcan leaders interact with their teams by creating a clear leadership model that emphasises the importance of team member-leader relationships (Buckingham & Coffman, 1999).

Researcher Recommendation 4: Medcan Values Clarification

As with a company vision, the company values can also be a powerful tool, or they can provide little benefit. Once again, this depends on how they are presented and recognized. Medcan's values as they currently exist are proving to be too long and complex for employees to remember and translate into at-work behaviours and actions. For this reason I recommend that the values be simplified into a brief statement of three or four core values that can be tied directly to daily work roles, behaviours, and actions.

Researcher Recommendation 5: Take-Away Application Required

Take-away refers to a direct application of the take-away learning from the Values Session. This requires a plan. Although the current Values Session contains an action planning section, this section is not emphasised, and there is no post-program follow-up to determine whether the action plan was implemented or had the desired effect. I therefore recommend that this section of the Values Session be revised to provide a more clear and structured opportunity for take-away learning and application.

Researcher Recommendation 6: Focus on Commitment to Medcan

Ultimately, a sense of loyalty results in commitment. As the participants in the focus group sessions reported, the Values Session had a positive effect on their

commitment to Medcan. However, they believed that they were more committed to their co-workers than to Medcan as a company. If Medcan wishes to attract and retain world-class talent and to inspire them to perform at a high level, I recommend that the area of commitment be addressed. Medcan must identify the areas that impact commitment and devise a plan to enhance these indicators.

Researcher Recommendation 7: Team Maintenance Required

Team maintenance refers to the ability of the team to retain a high level of performance and to continue the personal relationships that began during the Values Session. This would benefit Medcan by enhancing the longevity of the learning from the Values Session. I recommend that Medcan examine all available options to maintain the performance level of its employees. This includes conducting an audit of the existing training programs, examining the external options that are available but not currently being used, and determining what employees want and need in the area of training.

Organizational Implications

In this section I will analyse the process required to implement the recommendations outlined in the previous section. I will examine each of the seven recommendations and suggest implementation strategies. The seven areas are pre-session information, follow-up, Medcan's vision, Medcan's values, take-away, commitment to Medcan, and team maintenance. I will also discuss the role of leadership in the implementation process and the implications if these recommendations are not implemented.

I am making the following recommendations based on the study participants' suggestions combined with my personal experience with Medcan, the Values Session,

and the field of organizational development. These recommendations are intended to provide a starting point for improvement. Once I present these recommendations to Mr. Francis and the Medcan leadership team, I will continue to work with them to determine the best methods to continually enhance the Values Session and all future development programs at Medcan.

Pre-Session Information

All of the participants in this study contended that there was not enough pre-session information and that it was confusing. To help participants to gain a better understanding of the focus of the Values Session and why they are being requested to attend, I have developed the following recommendations.

Pre-session information meeting: Convene a pre-session meeting that all participants will attend. The Medcan president, the HR director, or another person on the executive leadership team should lead this session. The objective will be to clearly identify the focus of the session and why it was developed. This will have the added benefit of showing leadership support for the session and helping the participants to understand what to expect and how the session will relate to their work.

Manager's meeting: I recommend that each participant have a private meeting with his or her direct supervisor to develop specific areas of development and learning for the participant. They could select specific competencies on which the employee would work and then evaluate his or her performance and learning in this area. An action plan could be developed with timelines and learning objectives, which could be followed up at a future date to assess the employee's development.

Pre-package: The pre-package consists of a title page, a logistics page, a welcome/orientation letter, a map to the location, and two articles for pre-reading. The title page asks the participant if he or she is ready for a challenge. Although there is certainly challenge involved in the session, it should not be the main focus. The photograph that forms a backdrop for this page also elicits a strong emotional response, which is good, but the image does not portray teamwork and leadership. I recommend that this photograph be replaced with an image that focuses on team development and values and that the text support this focus as well. If a suitable image cannot be found, I recommend that the title page be left with no image at all.

The logistics page provides information on the session's location and timing, transportation, attire, requirements, and objectives. This page is also backed by several images and text that once again elicit an emotional response, but this time in a more positive light. Although these pages do not have an overtly negative impact on the pre-package, I would recommend that Medcan seek images and text that can more strongly support the objective and image of the Values session. All logistical information is acceptable with the exception of the session objectives, and this information will need to be changed to more closely reflect the current focus of the session.

The welcome letter is well written and reflects the focus and objectives of the session, and rewriting is not necessary; however, the font is difficult to read and does not reflect a professional and serious training session. I recommend that it be changed.

The information on the map and in the directions is accurate and well presented. I make no recommendations for change in this section.

The prereading includes two articles: “Putting the Service-Profit Chain to Work” (Heskett, Jones, Loveman, Sasser, & Schlesinger, 1994) and “Clueing in Customers” (Berry & Bendapudi, 2003). They are both excellent articles, but not all of the information is relevant to Medcan employees or to the Values Session. The intent of the articles is to help readers to understand their role in creating a successful company with a high level of customer service. Although this intent is valuable, perhaps there are shorter articles that express the same message, or these articles could be culled to present only the essential message. I also recommend another option: Present the articles for post-session reading to be followed up on at a future team meeting. Regardless of the route that is chosen, I recommend that there be some reference to these articles at the session. This will help to tie them in and to demonstrate that creating a successful business based on exceptional customer service is of paramount importance to Medcan.

Follow-Up

As many of the participants advised, the momentum begun at the session needs to be maintained and their continued development supported. This could be achieved with two different support structures. I recommend that each participant attend a meeting with his or her direct supervisor to offer the leader an opportunity to engage in a coaching conversation with each of his or her team members. At this time the participant and the manager could develop a personal learning plan, an action plan, and a follow-up structure, which would provide the employee with guidance on his or her development and enhance the personal relationship between employee and manager.

I also recommend that the session participants attend a post-session team meeting at regular intervals throughout the year following the values session. The intent of this

meeting would be to continue to build the relationships developed at the session, to foster cross-departmental interaction, and to create opportunities for learning and collaboration. I recommend that this team be presented with a project or challenge to work on together or develop its own action plan for continued team and organizational development. This session could be moderated internally, or a Medcan leader or HR leader could take on this role. Not only will this build strong team relationships, but it will also reinforce the importance of teamwork and the learning that took place at the Values Session.

Medcan's Vision

As stated above, a company vision can be an extremely powerful tool or just a collection of meaningless words. If Medcan is to use its vision as a powerful tool to guide growth, decisions, and interactions, I recommend that it do so in a deliberate way. Medcan is currently on this path, but there are opportunities to enhance the current strategy. Some employees have identified ambiguity in the company vision. To rectify this, I recommend that Medcan definitively create a vision statement and announce it to all employees, along with an explanation of what it means, why it was developed, how to translate it into action and behaviour, and how it will be connected to their daily performance. The vision must then be used and discussed on a regular basis. Particular emphasis must be placed on translating this vision into performance and results. For a vision to be effective requires that the team members know what it is, why it exists, what the intended results are, and how to translate it into action; and, ultimately, they need to care enough to do something about it. I recommend that the what, the why, and the how be conveyed in the Values Session as well as in all interactions at work.

Ensuring that team members care about it is another challenge that can be addressed in part in the Values Session and other training events, but most directly through the way in which Medcan leaders interact with their teams (Buckingham & Coffman, 1999). It can also be accomplished by creating a clear leadership model that emphasises the importance of team member-leader relationships. All Medcan leaders should then be trained and their performance measured based on this model.

Medcan's Values

A company's values are similar to its vision in their ability to be used as a powerful tool. This, however, does not happen by chance, but rather by design.

Medcan is currently focusing on using its values to guide interactions and decisions within the company. However, this research has revealed an opportunity for enhancement. Medcan's values, as they currently exist, are proving to be too long and complex for employees to remember and translate into at-work behaviours and actions. For this reason I recommend that the values be simplified and tied directly to daily work roles, behaviours, and actions.

Once a new values statement is developed, I recommend that it be incorporated into the Values Session. The content, activities, debrief opportunities, and application transfer during the session will need to be modified to focus on this new statement.

Session Application

The take-away learning from the Values Session requires a plan before it can be applied directly. Although the current Values Session contains an action planning section, it is not emphasised, and there is no follow-up post-program to determine whether the action plan was implemented or had the desired affect. For this to become an

important section of this session, modifications are necessary. Often this section is rushed at the end of a session. I recommend that more time be built into the outline to accommodate this section and that each participant have a greater focus on the creation of applicable action plans. However, this is still not enough to ensure the application of the action plans; each action plan must be followed-up post-program in a joint meeting between the participant and his or her direct supervisor or with a coach from the HR department. The goal is to provide the participants with an incentive to execute their action plans and a support network to help them.

I recommend that a more deliberate debrief process be used during the session to enhance the application of the take-away learning. The focus of each debrief would be to create specific and tangible transfer to the workplace. These ideas need to be captured and documented in such a way that they are easy for the participants to access post-session. A post-session document could be sent to each participant. Once again, there must be a reinforcement system, or this document will be largely underutilized.

I also recommend that take-away tool cards be created and presented to each participant during the session. These cards would contain information on the relevant theory, skills, and models that are presented in the Values Session. This format provides a tool that the participants can easily access post-session to help them apply their learning from the session to their work.

Commitment to Medcan

Ultimately, a sense of loyalty results in commitment. As the participants in the focus group sessions revealed, the Values Session had a positive effect on their

commitment to Medcan. However, they believed that they were more committed to their co-workers than to Medcan as a company.

My experience and the research have led to my conclusion that two factors determine employee commitment and loyalty: motivation and inspiration. Motivation is an external influence that can include financial compensation, benefits, awards, and bonuses. Medcan offers them, but I have little insight into this. Inspiration is an internal process that is influenced by external events. People become inspired through relationships and values (Buckingham & Coffman, 1999).

If Medcan hopes to enhance employee commitment, it is best and least expensive to start with its leaders. As Marcus Buckingham discussed in his books *First Break All the Rules* (Buckingham & Coffman, 1999) and *The One Thing You Need to Know* (Buckingham, 2004), employees' commitment to an organization is directly related to their relationship with their direct supervisors. In this way, much of the employee commitment is to the people of the organization and not to the organization itself. Medcan leaders need to lead in a deliberate manner that enlists commitment from their team members through motivation and inspiration. To achieve this level of leadership, Medcan will need to create a leadership model to guide its leaders, and this model must be introduced, taught, and reinforced. Then Medcan will stand a good chance of enhancing employees' commitment to their leaders and indirectly to the organization.

Team Maintenance

Team maintenance refers to the ability of the team to retain a high level of performance and to continue the personal relationships that began during the Values session. Continued training and team meetings can support this. Jack Welch and Suzie

Welch (2005) stated that “training motivates people by showing them a way to grow, that the company cares and that they have a future” (p. 109). A continual training and development program will constantly expose Medcan employees to the skills, tools, and theory that will help them to achieve and maintain a high level of performance. To make this a reality and to ensure value from the training sessions, I recommend that this process start with an inventory of the training programs that would benefit Medcan employees and enhance their performance. This list should be generated by examining industry standards and world-class companies in the same industry and surveying Medcan employees and leaders. Then an audit should be conducted to identify the training programs that are currently available at Medcan and to whom they are available. They would include internally delivered sessions, externally delivered sessions that Medcan directly provides, and externally delivered sessions that it does not directly offer, but that qualify for funds from the training budget if an employee wishes to attend.

I recommend that a training catalogue or schedule be created to present the available training programs, some of which will need to be designed or outsourced, from which Medcan employees can select. They will need to consult with their supervisors or managers to choose appropriate training programs, and their decisions should be based on areas of need and a performance measurement tool used to evaluate whether the training is having the desired impact on performance.

To help the Values Session teams to maintain a connection, I recommend that team meetings be held. The value of this is in the diverse make-up of the teams. As Medcan grows, a natural evolution towards departmental silos will occur because of the expanding complexity of the work as more team members and departments are added. As

volume increases, team members do not have the same amount of time available to interact with co-workers from another department. Many of the research participants found value in these cross-departmental relationships.

These meeting can easily be scheduled as quarterly or more frequent events, and they can be held at Medcan over a lunch break if available time is limited. The content of these meetings could focus on purely social and recreational pursuits or on a specific learning, challenge, project, or case study. These meetings will help to maintain the cross-departmental connection and further nurture the relationships that began to form at the Values Session.

Medcan's implementation of any of the above-mentioned recommendations will require a deliberate and focused plan and commitment from the Medcan leadership team. If Medcan leaders intend to see change within their organization, they will first have to identify the new reality that they want to create. Without this vision it will be difficult to know what to do and what not to do. Once this vision is attained, the leaders will need to develop a specific and deliberate plan for implementation. All Medcan leaders must be committed to the plan and must present a united and synchronised front. If Medcan employees identify a lack of commitment from the leaders to the change, it is unlikely that they will accept it.

What are the implications if Medcan does not implement these recommendations? Currently, the Medcan Values Session is successful, Medcan is successful as a company, and it currently receives commitment and loyalty from its employees. If nothing were to change, Medcan would continue on its current course. Although this is not bad, it would mean that significant opportunities have been lost. Through the application of a

deliberate training and development process, Medcan stands to gain commitment and performance from its employees and will have a greater chance of maintaining its place atop its field.

Implications for Future Research

I conducted this study with a very small portion of the Medcan population, and it is therefore difficult to generalize the findings from this study across the whole employee population. It is also not possible to transfer the findings from this study to other organizations. Some generalizations may be drawn, but direct application is not possible.

This research has provided insight into the power of the Values Session for specific individuals at Medcan. Although there is an assumption that the participants from this study represented the view of all Medcan employees, it cannot be concluded that this is so. To gain greater insight into the value of the Values Session to Medcan and its employees, continued study of this session is required.

For future research I suggest an examination of the Medcan Values Session based on Kirkpatrick and Kirkpatrick's (2005) evaluation levels three and four. To make this research more valuable and to be able to generalize across the Medcan employee population, I suggest that participation in this study be a standard part of the Values Session for all employees. I am not suggesting that participation be mandatory, but making it an integrated part of the session makes it more likely that a greater number of participants will become involved. This would foster a greater depth of understanding of the session and direction on how to continually modify it to meet the changing needs of Medcan employees.

This study examined Medcan's vision and values, but it also presents an opportunity to further investigate the power and application of the company's vision and values. To date only a few individuals have focused on this area, and further research would assist trainers and leaders in utilizing these potentially powerful tools.

The underlying format for the Medcan Values Session is experiential in nature. This research examined how the participants experienced this approach, but it did not compare the experiential approach to any other training format. An examination of various training formats could enhance all training styles and increase the company's ability to draw the best applications from all of them to create a training session that offers the greatest opportunity for learning and application.

Although I have concluded that the participants enjoyed and learned from the experiential approach, I cannot conclude that it was the experiential approach that facilitated this learning. The success of any training program depends upon many factors, including the program design, format, content, and facilitation. This study speaks to only this particular program and must take into account the content, format, design, and facilitation of this program only.

CHAPTER SIX – LESSONS LEARNED

This chapter discusses the various learning points for me during this research. I will focus on learning that directly relates to the research and learning that focuses on my learner assessment plan. The objective is to solidify the learning in my mind so that I can conduct future research more effectively and to share my learning with other researchers and potential researchers.

I have broken this section down into several subtopics that represent areas in which I have learned and areas in which I see opportunities for future improvement. I do not expect that my learning has been unique, but I believe that it will add to the ability of other researchers and students to identify learning opportunities and to create a more productive research opportunity.

Project Sponsor

Finding a project sponsor was somewhat of a challenge for me. Early on I partnered with my initial sponsor and agreed upon a focus for this research, and I began to write my first research proposal. My sponsors then changed their minds regarding the focus, and I began to write the second proposal. The company then became involved in a hostile takeover, and the training department did not want to call attention to itself, fearing that the new owner could send it to the chopping block if it did not like what it saw. Whereas I saw this as an opportunity to prove the company's value, the sponsors saw it only as an opportunity to be more visible than they preferred. Therefore, they terminated our agreement.

I scrambled to find a new sponsor, and I began to write my third proposal. Fortunately, I have had very good support from this sponsor, and my research proceeded well.

Although this situation was beyond my control, I learned from it. Change is something that occurs on a daily basis. I decided that this change was beyond my influence and that I had to focus on the only thing over which I do have influence: myself. I knew that I had to accept this setback as learning and move on in a positive manner. I still have a relationship with my first sponsor and wish to continue to work together.

Research Focus

The RRU Master of Arts in Leadership and Training faculty continually reminded me to make sure that I had a narrow focus for my research to avoid its getting out of control. Although I listened to their advice, I did not understand the depth and wisdom of it until I became involved my research. Even at my proposal stage I did not fully comprehend how much I should narrow the scope. Once I began my research, however, it became crystal clear, and I quickly realized that I could not hope to attain all of the lofty goals that I had laid out in my proposal. This forced me to re-examine the goals and objectives of my research and to bring them into a more realistic and attainable format.

Data Gathering

Gathering data is obviously of great importance in conducting research; without data, there can be no research. In my proposal I determined that I would use focus groups and personal interviews to gather my data. This sounded very reasonable at the time, and the literature that I had been reading concluded that they were effective data-collection

methods. Unfortunately, this looked much better on paper than it did in application. I had a very difficult time in finding participants for my study, and a very small percentage of the potential population agreed to be a part of my study. I have concluded that this was a result of two primary factors: the type of data-gathering tools that I had selected and the fact that I was external to the organization.

Potential participants were reluctant to commit the time required to take part in the focus group and personal interviews. Even though I tried to reduce the barriers as much as possible by agreeing to hold the interview sessions in the participants' offices and being flexible with my time, this did not seem to positively influence my selection results. I concluded that my potential participants were very busy and did not want to take the time from their schedules to become involved in a study that they perceived as of little value to them.

This brings me to my second conclusion based on my being external to the organization. This means that potential participants had little personal connection to me and did not feel any responsibility to work with me on this project.

If I were to conduct this research again, I would try to engage potential participants through an e-mail-based survey, which I believe would result in a greater response and participation.

Another learning is related to my learner assessment plan, which guided my interactions and leadership throughout this project.

Ethics

Before beginning this project, I found it difficult to understand why I needed to focus on ethics. I believe that I am an ethical person and would not intentionally do

anything that could be construed as unethical. What I learned, however, was that I needed to think about ethics intentionally. Interacting with research participants is new to me, and without careful consideration, I could easily have made a mistake in this area. I needed to think about each and every interaction during this research and approach it in a deliberate manner with a predetermined plan and take any potential ethical issues into account.

Through this conscious interaction, I believe that I have acted ethically during this research. I am also now more attuned to ethical conduct in other aspects of my personal and professional life.

Communication Skills

Throughout this research I interacted with many new people for a purpose that was new to me. This meant that I needed to focus on both my oral and written communication skills if I were to gain the results I sought. I also needed to focus on my perceptions and assumptions when I received both oral and written information.

When I was the sender of information, I needed to take into account what information I intended to communicate, why I was communicating it, and to whom I was communicating it. Once I had considered these factors, I then needed to choose the appropriate method of delivery and select the appropriate words. If I did not follow this procedure, there was a good chance that my message would not be received or that it might be misinterpreted.

As a researcher I also received a great deal of information. In this role I had to be especially attuned to my perceptions, preconceived ideas, and assumptions. I had to be as objective as possible, lest I taint or skew the data.

As a researcher, I was taking a leadership role, and therefore I was setting the communications standard. If I communicated effectively with my research participants, it was more likely that they would communicate effectively with me.

Research and Inquiry

When I began this project I believed that I had a reasonable understanding of what it takes to conduct research. As I progressed, however, I found that there were many things that I did not know, did not understand, or had not thought about before. I had to immerse myself in this project and learn as much as possible in a short period of time. Although I do not profess to be a master researcher, I do believe that my ability in this area has grown greatly.

This skill development has played a direct role in my everyday work as a trainer and consultant. I am looking at clients' needs differently than I did before and conducting my needs-assessment and design phases more in line with a research project. This has allowed me to gain a greater depth of understanding of my clients' needs and to design a more appropriate program based on current research findings in the related area.

Systems Theory, Thinking, and Planning

While I conducted this research I had to consider all of the factors that could influence the data I gathered because they would directly affect the results and the conclusions that I drew from the research. Failing to do so would have resulted in inaccurate or incomplete information.

This has given me the insight to examine my client interactions in a different way. Not only do I look at my clients' current reality and training needs, but I also examine

their role in their larger system and other factors that influence the results that they are getting. This helps me to design an appropriate training program to meet their needs.

Organizations and Organizational Change

My intention in this research has been to examine the ability of the Values Session to meet the needs that Medcan has identified. I understood from the start that this would likely lead to some form of change within the session design, which would lead to change within the organization.

For this reason I had to be aware of how this change would affect me as the program designer and facilitator, the participants in the Values Session, and Medcan as an organization. I also had to be cognizant of the way in which I introduced the change that resulted from the conclusions in this research. If this change is not implemented properly, it could possibly fail, even if it is appropriate and well intentioned.

I am now in the process of beginning to introduce changes, and I am doing so in a very deliberate manner that takes into account the system within which Medcan and its employees operate and the communication style of everyone involved. Through this intentional approach I hope to achieve greater acceptance of the changes that I am introducing.

Leadership

Much of what I teach in my training programs focuses on leadership. Therefore anything that I can do to enhance my understanding and competency in this area is of benefit to me and to my clients. From this research I was able to gain a new appreciation for my leadership style and the styles of others. Because I was interacting with people in a new role, I had to think about my leadership style if I wished to achieve the results I

sought. This has led to the inclusion of new leadership theory and practice in the content of my training program. I have begun to investigate the ability of teams to self-lead and how leaders can create self-led teams, the goal of which is to create a team of proactive, self-reliant leaders.

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APPENDIX A – LETTER OF INVITATION TO POTENTIAL
RESEARCH PARTICIPANTS

I would like to introduce myself and invite you to be part of a research project I am conducting. This project is part of the requirement for a Master's Degree in Leadership and Training at Royal Roads University, and is being sponsored by Medcan Inc. under the direction of Shaun Francis. My name is **Scott Kress** and my background is as a team development trainer. I have been consulting with Medcan for the past three years and have led the "Values" session in the past. If you choose to participate in this study you will interact with me as a researcher before and after the "Values" session, and as a facilitator during the session.

Study Purpose: The objective of my research project is to explore *how the "Values" session influences the level of understanding of Medcan vision and values*. This opportunity will allow you to share your views, thoughts and experiences with colleagues, and will help identify what aspects of the Values session are most effective.

Role of Participants: Participants in the study will engage in two one-hour focus group discussion; the first at the end of April and the second in mid May. Themes will be identified from each focus group.

Confidentiality: All information in this study will be kept confidential and summarized in an anonymous format into themes. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand.

You are not compelled to take part in this research project. If you do elect to take part, you are free to withdraw at any time with no prejudice. Similarly, if you choose not to take part in this research project, this information will also be maintained in confidence.

Should you have any questions or concerns, please feel free to contact me at any time. If you would like to participate in my research project, please confirm your interest with me before **April XX, 2006** at:

Email: xxxxx@xxxxxxxxxxxxxxxxxxx

Telephone: xxx-xxx-xxxx

Sincerely,

Scott Kress

APPENDIX B – SECOND LETTER OF INVITATION TO POTENTIAL
RESEARCH PARTICIPANTS

I would like to introduce myself and invite you to be part of a research project I am conducting. This project is part of the requirement for a Master's Degree in Leadership and Training at Royal Roads University, and is being sponsored by Medcan Inc. under the direction of Shaun Francis. My name is **Scott Kress** and my background is as a team development trainer. I have been consulting with Medcan for the past three years and have led the "Values" session in the past. If you choose to participate in this study you will interact with me as a researcher before and after the "Values" session, and as a facilitator during the session.

Study Purpose: The objective of my research project is to explore *how the "Values" session influences the level of understanding of Medcan vision and values*. This opportunity will allow you to share your views, thoughts and experiences with colleagues, and will help identify what aspects of the Values session are most effective.

Role of Participants: Participants in the study will engage in two one-hour focus group discussion; the first at the end of April and the second in mid May. Themes will be identified from each focus group.

Confidentiality: All information in this study will be kept confidential and summarized in an anonymous format into themes. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand.

You are not compelled to take part in this research project. If you do elect to take part, you are free to withdraw at any time with no prejudice. Similarly, if you choose not to take part in this research project, this information will also be maintained in confidence.

Should you have any questions or concerns, please feel free to contact me at any time. If you would like to participate in my research project, please confirm your interest with me before **April XX, 2006** at:

Email: xxxxx@xxxxxxxxxxxxxxxxxxx

Telephone: xxx-xxx-xxxx

Sincerely,

Scott Kress

APPENDIX C – CONSENT FORM

Consent Form for Focus Group Participants

Royal Roads University, School of Leadership Studies
 Master of Arts in Leadership and Training
 Research Project: Experiential Training
 Researcher: Scott Kress

This research project is part of the requirement for a Master of Arts in Leadership and Training and is being sponsored by Medcan Inc. under the direction of Shaun Francis, President.

The learner concerned is **Scott Kress**; credentials with Royal Roads University can be established by telephoning Graham Dickson, Director of the School of Leadership Studies, Royal Roads University at (XXX) XXX-XXXX or Nancy Greer, Academic Lead, at (XXX) XXX-XXXX ext. XXX.

This document constitutes an agreement to take part in a research project, the objective of which is to examine *how the “Values” session influences the level of employee engagement and understanding of Medcan vision and values.*

The research will consist of two focus groups where dialogue on the topic of vision and values is foreseen to last approximately 1 hour per focus group and will take place in a private meeting room at the Medcan office. The dialogue questions will refer to the participants’ experiences and views on the “Values” training session. Although I will be present during the “Values” session no data will be collected at this time and there will be no identifiable difference between those participating in my research and those who are not.

Information will be transcribed onto computer and projected for all to see. The ensuing recommendations will be part of the final report. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand. A copy of the final report will be housed at Royal Roads University and will be publicly accessible.

Prospective research participants are not compelled to take part in this research project and participation in the “Values” session does not include mandatory participation in this research. If an individual does elect to take part, she or he is free to withdraw at any time with no prejudice. Similarly, if “Values” participants elect not to take part in this research project, this information will also be maintained in confidence.

By signing this letter, the individual gives free and informed consent to participate in this research project, and agrees to keep confidential any personal information shared during the focus group sessions.

Name: (Please Print): _____

Signed: _____

Date: _____