

WALK IN MY FOOTSTEPS: A TEMPLATE FOR NEW EMPLOYEE ORIENTATION and JOB SHADOWING

Prepared by:

Alicia Bragdon, R.S.

Health Environmentalist
Woodford County Health Dept.
229 North Main Street
Versailles, KY 40383
Phone: (859) 873-9114
Fax: (859) 873-7238
aliciar.bragdon@mail.state.ky.us

Clayton Horton, R.S.

Senior Health Environmentalist
Green River Dist. Health Dept.
1600 Breckenridge Street
Owensboro, KY 42303
Phone: (270) 852-5571
Fax: (270) 926-9862
clay.horton@grdhd.org

Sharon Burke

Director, Home Health
Green River District Health Department
P.O. Box 309
Owensboro, KY 42302-0309
Phone: (800) 928-7123
Fax: (270) 926-9862
sharon.burke@grdhd.org

Mark Reed, R.S., MPA

Food Manufacturing Supervisor
Kentucky Food Safety Branch HS2E-C
275 East Main Street
Frankfort, KY 40601
Phone: (502) 564-7181
Fax: (502) 564-6533
mark.reed@mail.state.ky.us

Lisa Daniel, MPA

Program Administrator
HIV/AIDS Branch
Kentucky Department for Public Health
275 East Main Street HS2C-A
Frankfort, KY 40621
Phone: (502) 564-6539
Fax: (877) 353-9380
lisa.daniel@mail.state.ky.us

Veronica Stallings

Director of Finance
Green River Dist. Health Dept.
P.O. Box 309
Owensboro, KY 42302-0309
Phone: (270) 686-7747
Fax: (270) 926-9862
veronica.stallings@grdhd.org

Project Mentors:

J. David Dunn, MPH, Sc.D., R.S.

Director
School of Health and Human Services
AC 201 B
Western Kentucky University
1 Big Red Way
Bowling Green, KY 42101-3576
Phone: (270) 745-6395
Fax: (270) 745-7073
david.dunn@wku.edu

Angela Woosley, RN, BSN

Community Health Planning Spec.
Green River Dist. Health Dept.
P.O. Box 309
Owensboro, KY 42302—0309
Phone: (270) 852-5571
Fax: (270) 926-9862
angela.woosley@grdhd.org

EXECUTIVE SUMMARY

An examination of the state-administered personnel system for Kentucky local health departments reveals that each health department should include the employee receiving a handbook pertaining to the LHD operational procedures and guidelines, as stated in the Administrative Reference for Local Health Departments. However, no template for a standardized manual exists. “Walk in my Footsteps,” a two-part concept, seeks to develop a uniform employee orientation and job-shadowing model for use by Kentucky local health departments.

The templates created in this project are designed to assist and encourage local health departments to initiate their own “customized” employee orientation manual, and an in-house job-shadowing experience which can conceivably be effective for all employees—not just specifically new hires. The goals of this change masters project are to (1) develop an adaptable employee training manual template that meets all regulatory requirements and includes necessary information for new hire orientation; and (2) to develop an employee job-shadowing template for health professionals to use as a guide, in leading both new hires and “seasoned” employees alike, through a job-shadowing experience. The objectives of this project, once implemented, are to (1) help address a perceived internal identity crises; (2) to improve the local health department employee’s understanding of the overall functions of the department as a public health institution; (3) to increase the professional success, job satisfaction, and productivity of public health professionals within the local health department; (4) to promote cohesion and a spirit of mutual cooperation, trust and respect among local health department employees; and ultimately, (5) to help strengthen the field of public health through the professional growth and retention of local health department employees.

The methodology exercised to achieve our objectives included examination of existing employee manuals, researching statutes and regulations, and correspondence between group members and mentors. The resulting project includes an orientation manual template and a job-shadowing template.

This project embraces one of the ten essential public health services—that of assuring a competent public and personal health care work force (Rowitz, 2001, 95-96). Participant gains are likely to include increased self-confidence, heightened “inside” knowledge of the organization, a greater sense of personal worth, and greater employee knowledge, skills, and abilities.

The finished template included in the manual contains essential employee-related issues and programs. Some examples include internal and external chains-of-command, insurance, and confidentiality statements. The job-shadowing instrument provides a guide to lead employees and trainers through the job-shadowing experience, as well as providing a tool for program evaluation.

This change master’s team is excited about the possibilities of a standard orientation manual and a job-shadowing program, as the two relate to both employee retention efforts and a greater sense of professional identity. As such, the authors of this document recommend that future KPHLI scholars consider as their change masters project, actual implementation and follow-up on the hybrid model presented here.

WALK IN MY FOOTSTEPS: A TEMPLATE FOR NEW EMPLOYEE ORIENTATION and JOB-SHADOWING

Background and Introduction

Certainly, it can be argued that the first place for improvement is from within—specifically from within our local county health departments which are quite frankly situated on the “front lines” of public health practice—by ensuring a well-trained and competent work force. As Rowitz (2001) contends in his text, “Despite the efforts to promote public health, the public still does not understand the nature of the field (400).” “It is clear,” the author states, that among the general public “there is general ignorance about what public health practitioners do (401).” While this is undeniably true, one must also question how we can expect to address this external identity crises when, even in our own local health departments, a number of employees—new hires in particular—lack an understanding of precisely what the different in-house disciplines do and at the same time fail to see exactly where they themselves fit into the overall matrix.

As Gordon (1998) warns, “We may all think we know what public health is, but our definitions vary widely.” “And if we can’t agree on the nature of the field,” he continues, then “we shouldn’t be surprised if the public and our political leaders do not understand and adequately support public health.” In sum, argues Gordon, having “lost sight of the meaning and primacy of public health...Many health departments suffer from blurred vision syndrome...[and] have become causes in search of an identity.”

Quite simply, it is the premise of this change master’s group that such internal identity crises exist within local county health departments and that the development and implementation of a job-shadowing program—a variant of the mentoring concept—is an effective way to address this issue. This change master’s project also aims to address the inequities which exist in terms of new employee personnel manuals by creating a template to assist and encourage many of the smaller, independent health departments across the state to produce their own “customized” employee orientation manual. Such a document would serve as a single-source, one-stop reference for the new employee in terms of employment-related policies. The anticipated consequences of this two-tiered project, if fully implemented, is likely to include increased employee job satisfaction and the retention of valuable employees.

Organizationally speaking, potential gains from program implementation are likely to include improved cohesiveness among local health department personnel, a well-rounded workforce, a realization of the organization as a public health team, and because of greater employee satisfaction, lasting employees. Participant gains are likely to include increased confidence, increased “inside” knowledge, a greater sense of personal worth to the organization, rejuvenation, and increased knowledge, skills, and abilities. Given the win-win nature of mentoring—and in this case job-shadowing—Rowitz (2001) argues that *public health leaders* [emphasis added] seek to create an environment within their respective agencies that is conducive to mentoring (325), embrace continuing education, and foster learning opportunities among their employees (333). In sum, Luna & Cullen (1995) explain that “Mentoring is useful and powerful in

understanding and advancing organizational culture, providing access to informal and formal networks of communication, and offering professional stimulation to both junior and senior” personnel. These and additional gains are discussed in greater detail in the literature review.

Given the current public health identity crisis and the fact that, perhaps due to pay and other considerations, qualified applicants are not necessarily knocking down the doors of local health departments for employment applications (Roederer, 2001), such an investment only makes sense. Such an investment also fits neatly into the related ideal of succession planning which recognizes that “leaders and their colleagues cultivate the best people for the future today (Richards, 1997).” Simply stated, innovative approaches along the lines of job-shadowing and learning groups are needed to assist public health as an institution address its capacity for future leadership.

Consequently, in the absence of a standardized template, there exists a hodge-podge of training/orientation programs across the state with some obviously better than others. Particularly among health departments with no tangible orientation or personnel manual, employees may experience a sense of misunderstanding about the job, the organization, and specific personnel-related matters. The benefits of a tangible document are many and include the fact that it can be used as both a documentation and legal tool, as a mechanism for recruitment, a tool to promote organizational transparency, and as an employee support mechanism (Nelson, 2002).

The idea is to create somewhat of a uniform personnel manual template that local health departments can “customize” for their own in-house use. In assembling the template, the team faced the daunting task of creating a uniform tool that could be utilized “across the board” by health departments as a checklist for what should be included in a personnel manual, while at the same time allowing some flexibility for customization—all this without creating an overly burdensome or cumbersome document.

Project Description

“Walk in my Footsteps,” a two-part concept, seeks to develop a uniform employee orientation and job shadowing instrument for use by Kentucky local health departments. The templates created in this project are designed to assist and encourage local health departments to initiate both (a) their own “customized” employee orientation manual, and (b) an in-house job-shadowing experience which can conceivably be implemented for all employees—not just specifically new hires.

The orientation manual template aims to address the deficiencies that exist in terms of new employee personnel manuals by creating a guide that contains all mandated information, plus additional orientation tools. The document will be in a format in which will allow the individual health departments or districts across the state a means to tailor the manual to suit their own unique agency needs. Once refined, such a document would serve as a single-source, one-stop reference for the new employee in terms of employment-related policies.

A guide for the implementation of a job shadowing program, a variant of the mentoring concept, was developed to familiarize the new hire with each branch or functional discipline within the health department. The job shadowing component

includes both interactive and shadowing sessions which allow the participant to engage in a cross-sectional learning experience which cuts across a number of disciplines and professions within the health department. To determine if project objectives are being met, an evaluation tool will also be included.

Goals/Objectives

The goals of this change masters project are to (1) develop an adaptable employee training manual template that meets all regulatory requirements and includes necessary information for new hire orientation; and (2) to develop an employee job shadowing instrument for health professionals to use as a guide, to lead new hires through a job shadowing experience.

The long-term objectives of this change masters project, once implemented, are to (1) help address the perceived internal identity crises which cuts across various disciplines among local health department personnel; (2) to improve the local health department employee's understanding of the overall functions of the department as a public health institution; (3) to increase the professional success, job satisfaction, and productivity of public health professionals within the local health department; (4) to promote cohesion and a spirit of mutual cooperation, trust and respect among local health department employees; and ultimately, (5) to help strengthen the field of public health through the professional growth and retention of local health department employees. It is the opinion of this group, that both templates should be implemented in conjunction, to achieve all project objectives.

Methodology

Although the original focus of this team's change masters project was initially centered around developing a job-shadowing model or template, a December 2002 meeting with Robert Nelson of the state's Local Health Operations Branch provided the impetus for making this a two-tiered project. As explained by Nelson, no standardized employee orientation/personnel manual currently exists which has as its purpose to serve as a guidance document for what should be included in such manuals.

The methodology exercised to achieve our objectives included examination of existing employee manuals, researching statutes and regulations, collective personal experiences of group members, and correspondence between group members and mentors.

Orientation Manual:

The first task in the development of a standardized personnel manual was to determine the minimum mandatory training that local health departments are required to provide for new employees. This information was obtained from the Administrative Reference for Local Health Departments, and relative Kentucky statutes and regulations. The second step was to review existing training manuals to determine what additional information should be required. Personnel-related manuals from the following public health agencies were selected as primary examples: The Woodford County Health Department, The Kentucky Cabinet for Health Services, and The Barren River District

Health Department. Examples of branch services and local policies and procedures were obtained from these sources. The final step was to compile and arrange the information in a meaningful, user-friendly format. The final template is presented as a MS Word document.

Job-Shadowing Instrument:

To assemble a tool for job shadowing, a detailed outline of branch services, job titles and job duties was initially compiled. However, due to the inherent variability between local health departments and job duties, the group elected to instead prepare a guidance document rather than a step-by-step template. Information for the job-shadowing instrument was obtained from correspondence between co-workers and the collective personal experiences of group members.

Essential Public Health Services

#8: Assure a competent public health care workforce

This project, with its emphasis on new employee orientation and socialization, is most clearly aligned with essential service eight—that of assuring a competent public health workforce. To elaborate, the new employee orientation template to be utilized by local health departments is intended to serve as an aid in the design of a “customized” employee orientation manual for departments either lacking such a formal document, or for departments wishing to revise existing manuals. In addition, the proposed template for an in-house job-shadowing instrument resulting from this project can conceivably be implemented for all employees—not just specifically new hires. The case for a well-trained, competent public health work force is clearly articulated by the Institute of Medicine in *The Future of Public Health*. “A firm grounding in the commitment to the public good and social justice...gives public health its coherence as a professional calling,” the organization states (127).”

Public health leaders, Rowitz (2001) states, “have key roles in the delivery of all the essential services.” “With regards to development of a competent work force,” the author continues, “they build learning organizations based on systems thinking and support continuing education opportunities for the public health work force (92).” With this mandate of public health leaders in mind, a mentoring or shadowing program with its chief aim of personnel training and development, embraces one of the ***ten essential public health services***—that of ensuring a competent public and personal health care work force (Rowitz, 95-96).

In particular, a review of the literature notes three transitional occasions when organizational commitment to staff training and development is imperative: on the occasion of the new hire (a primary focus of this change masters project), during implementation of new technologies and other emerging developments or trends, and when individual job duties change (Make, 2002). Finally, this change master’s project, with its emphasis on cross-discipline training, is in harmony with the basic public health sciences skills section of the ***universal competencies for public health professionals*** which espouses that public health professionals have an “understanding [of] the historical

development and structure of state, local, and federal public health agencies (Turnock, 1997, 230).”

Results

Orientation Manual:

As evidenced by the finished template, any number of employee-related issues and programs were considered essential for inclusion in a uniform orientation manual. Goals and Philosophies of the local health department, the internal (including board of health) and external (local/state relationship) chain-of-command and reporting structure, and a number of agency-specific nuances (time, insurance, confidentiality statements, etc.) had to be considered. Likewise policies regarding promotions, sick time, workers compensation, and grievance procedures were also considered to be essential components of a uniform personnel manual. Legal and ethical requirements and obligations are also a necessity in such a document. Finally, job descriptions for senior health department staff (public health director, director of finance, etc.), as well as discipline-specific job descriptions must not be overlooked. To reemphasize, the task of assembling an orientation manual template which addresses, among other things, the above items, proved no small task. As such, it becomes easier to recognize why many local health departments have not created such a formal document.

The following is the Table of Contents from the employee orientation template.

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Job-Shadowing Instrument:

Our job-shadowing project is an instrumental/peer variant (Holbeche, 1996; Coldwell, 1998) of a formal mentoring program that include peers teaching peers, as employees from one discipline work along with employees from another discipline for a given time period as a means of fostering an appreciation of each other's job. In this respect, each employee, with perhaps the exception of the new hire, serves almost simultaneously as both mentor and mentee.

Job shadowing is simply the process of a person spending time with another individual or group of employees and observing them in the day-to-day activities of their jobs. The amount of time that is required for each job-shadowing experience will vary depending on the particular position that is being observed. Suggestions for these informal learning objectives for each discipline are described in the Job Shadowing Instrument section of the orientation manual.

A tracking form that is used to record the shadowing training is included in this section. This form provides a checklist of topics to guide the "shadowed trainer" during the session. For this program to be effective, it is essential that an opportunity for discussion and questions about the various functions of different departments is created

during and/or after the shadowing experience. At the conclusion of each shadowing experience, the employee should complete the Employee Orientation Shadowing Evaluation provided at the end of this section.

Creating a job-shadowing program need not require excessive additional administrative time. It simply requires the maintenance of a simple scheduling system (a calendar will do), a departmental contact list for shadowing, and the appropriate evaluation forms. A sample procedure will be included with both the New Hire Experience and the Existing Employee Experience.

Conclusions and Recommendations

This change master's team is excited about the possibilities of job-shadowing and learning groups as the two relate to both employee retention efforts and a greater sense of professional identity. Given the substantial amount of time the team invested in this particular project, it is the sincere wish of this team that future scholars will embrace this project and pick up where the team left off—and ultimately—see it to the implementation phase. As such, the authors of this document respectfully offer the following recommendations:

(1) That future KPHLI scholars consider as their change masters project, actual implementation and follow-up on the hybrid model presented here. In terms of the new employee socialization process, this should almost certainly include the production of a video-taped “welcome to the field” featuring our state’s top public health official—the Commissioner of Public Health—in a short motivational which both defines public health and, regardless of discipline or work assignment, attempts to explain why the employee “matters” in the context of the “big picture (Nelson, 2002, Personal Interview).”

While the group’s two-part instrument “Walk in My Footsteps: A Template for Employee Orientation” was completed on schedule, the team fell short of its ultimate goal of having a professionally recorded and edited video of the state’s Commissioner of Public Health “in-hand” by our April 2003 project deadline. In sum, two major obstacles conspired to hinder this particular aspect of our project—the state’s current budgetary crises/fiscal dire straits, and time constraints.

Certainly, in order for the full potential of this team project to be fully realized, steps should first be taken to complete the supplemental video as well as pilot this project at a select number of local health departments across the state. Should a formal survey find favorable results, additional resources should then be sought so that statewide distribution could occur.

(2) As part of the implementation process, future scholars might also consider the development and implementation of a more formal, long-term (six months to two years or longer) mentoring program and attempt to identify the specifics underlying the most successful mentoring models (Luna & Cullen, 1995).

(3) Although the elements of time and prior work commitments conspired to prevent this change master’s team from exploring a “public health-as-a-profession” recruitment model targeted at school-aged children, such exploration is warranted as a means to spark a young person’s interest in the field and to promote public health as a viable career option.

(4) Within the limits and constraints posed by both privacy and liability issues, the authors of this report would also encourage future KPHLI scholars to explore the implementation of a job shadowing program where the student can observe public health professionals at work. Such a program—possibly a “ride-along” project—should be especially promising for “showcasing” the environmental health discipline and the work of the public health environmentalist which includes restaurant and swimming pool inspections, rabies prevention, on-site sewage disposal, and environmental education.

One such novel approach is Oregon State University’s SMILE program which targets students through elementary, middle, and high-school and seeks to promote the pursuit of careers in the science disciplines. This approach emphasizes “hands on” projects between students and their mentors so that students can see the professionals at work (Neuman, Bloomfield, Harding, & Sherburne, 1999). An innovative job shadowing approach based on this model would certainly be one novel approach that we might take as a profession to make public health as a whole more visible and, as a consequence, a more appealing employment option for a future workforce. Such an approach would, in effect, serve as a recruitment tool which would have as its goal to encourage students of all ages to pursue a career in one of the many public health disciplines, including environmental health. Only time will tell, however, but the anticipated result of such an undertaking would be a work pool consisting of increased numbers of highly qualified college graduates purposefully choosing a public health discipline as a long-term career choice.

Leadership Development Opportunities

Alicia Bragdon: As a relatively new employee to public health, I am excited about the possibilities presented in this project. The “overwhelmed” feeling that a new employee experiences is still fresh in my memory. It is my belief that this project would ultimately lead to an improved work force by means of a complete orientation program. My only disappointment is that we did not have the opportunity to pilot this program in a local health department. It is my hope that future KPHLI change master groups will continue with this project, and pilot the program.

Sharon Burke, RN: As the director of a public home health agency, I am well aware of the fact that home health operates very differently than most of the rest of public health as well as the fact that home health is not considered “core” public health. For this reason I was very excited about my opportunity to participate in the Kentucky Public Health Leadership Institute, seeing it as a means to broaden my understanding of our public health system. KPHLI has done that and so much more. Not only do I have a better, though not perfect, understanding of public health as a whole, working with my change master and consulting groups, I have better insight into some specific programs offered by public health such as HANDS and Environmental Services. In addition, I have developed professional relationships that will prove to be beneficial well into the future.

When I took my first position with the Green River District Health Department, I assumed, being part of a state wide system, there would be uniform policies, procedures and well established protocols for all aspects of my job. I was mistaken. Our Change

Master Project, Walk in My Footsteps, only proved to confirm my mistaken idea. As we worked to develop a shadowing project for public health, our project was forced to change focus on more than one occasion as we discovered the many differences between all the local health departments. Those differences, however, did serve to support our original premise that a better understanding of the various aspects of public health by **all** employees will not only serve to increase cohesiveness and understanding between employees, it will foster interdepartmental referrals/cooperation, thereby increasing our ability to meet the needs of the residents of our individual counties and districts. I am proud to have been a part of KPHLI and to have participated in a project that will serve to enhance our ability to carry out our mission.

Lisa Daniel: Being an employee of the Kentucky Department for Public Health and not of a local health department (LHD), where employees work in the trenches, the Kentucky Public Health Leadership Institute has provided me with new insight and appreciation for the LHD's involvement with members of their community. In my position, I work with individuals across the Commonwealth and am not afforded the opportunity learn the intricacies of a specific community the way LHD employees do. And, I envy their ability to do so. I truly enjoyed the occasion to interact with other public health professionals and hear their perspective on topics discussed at the summits.

The Change Master Project has been a unique learning experience for me. As the research began to take shape and reveal that no formal template for employee orientation exists, the group decided to broaden its objective to include a template as well as a guide to shadowing. And, although this decision increased the size of our project, and thus, increased our workload, I truly feel it was the right decision. Without the orientation template to follow, the shadowing instrument would simply be implemented with LHD's existing orientation program. At least with the development of the template, more uniformity now exists for LHD's to implement both pieces. I am honored to have been a KPHLI scholar and to have been part of this change master team.

Clayton Horton: I can not state emphatically enough what a wonderful opportunity it has been for me to participate in this year's class of the Kentucky Public Health Leadership Institute. The Leadership Summits as well as the other assignments provided me exposure to material and issues that I normally would not have received training on. I place even a greater value in the fact that KPHLI has provided me with a chance to interact with other public health professionals from around the state. What made this experience unique was the cross-section of different disciplines and the subject matter which upon we were allowed to interact.

Completing the change master project was as equally rewarding as the other aspects of the curriculum. I particularly enjoyed the dynamic we experienced as our group's project evolved from two separate ideas into a single direction. What resulted was different than either of the original concepts. However, what evolved out of the effort that the six of us exerted was a project that we were not only proud of, but a product that has potential to improve our profession.

Mark M. Reed: As a public environmental health professional whose heart is still “in the field” I have a profound respect for those on the “front lines” of public health—in particular those individuals serving at the local health department level. Regardless of discipline, these individuals are the “foot soldiers” of the profession who, on a daily basis, impact in a positive manner the health of their community through prevention-based services and inspectional activities. From the perspective of someone who’s “been there,” it is most frustrating to see these individuals do so much and receive so little formal recognition that what they do every day matters and impacts countless lives. With this in mind, I am most proud to have contributed to a change master project which has as its purpose both the retention and motivation of local-level public health professionals, and seeks to engender an in-house, local health department cross-discipline appreciation of each employee’s job duties.

Perhaps the highlight of this project has been the formulation of something tangible—a template for action—out of the diverse interests, personalities, and perspectives of our six team members. Over the course of a year, each of us in some small way—much like the overall goal of our project—gained an appreciation of the others perspectives and unique vision for the completed project. In return for each team member’s “give and take,” we were able to work successfully as cohesive unit. To my fellow team members as well as my fellow 2002-2003 Scholars, it has been both an honor and a pleasure to have worked with you and to have learned from each of you. Meeting, learning from, and networking with such a cross-discipline mix of unique and diverse personalities from across the state is surely the most outstanding feature of the Kentucky Public Health Leadership Institute.

Veronica Stallings : The KPHLI experience was valuable to me in several ways. The interaction and communication with varying disciplines exposed me to a variety of management issues and styles. The series lectures and presentations that included examples and interactions allowed me the opportunity to apply the material we were learning. The intensity of the sessions kept the group focused which aided in the learning experience, especially when the material was complicated. The small group sessions also assisted through encouraging communications and participation. The instructors were very knowledgeable, with the ability to transfer the knowledge to each participant regardless of background education and experience.

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