# Avoid Having Your Day in Court

HRD relationships are potential sources for numerous lawsuits. To which kind of legal actions are you most vulnerable? Learn to take precautions now, before you're asked to tell it to the judge.

By JAMES K. McAFEE and LAWRENCE S. COTE

Embarking on your new career as a free lance trainer, you run your first ad: "Be a word processing operator or type as fast as one." Ten bright-eyed and bushy-tailed trainees file in on the first day having prepaid their $250 entry fee. At the end of the five-week course, one student who types no faster than he did when he arrived in your classroom looks at you with tearful eyes and says, "But you promised . . ." Two days later, you hear from his lawyer. A suit has been filed charging you with fraudulent misrepresentation. Why didn't you see it coming?

Time in court as a defendant in a liability suit is at best unpleasant and time consuming. Malpractice suits abound in our increasingly litigious society. Recently, even a college basketball referee was sued for making a bad call.[1] Although the suit was dismissed as frivolous, it highlights the increasing vulnerability of professionals.

Most educational malpractice suits have been similarly unsuccessful, yet courts and legislatures are beginning to express a change in attitude. Heightened by the clamor for educational improvement, specific demands for accountability may increase the educator's time in court. Although most material written on malpractice and liability in education has been directed toward the education of children, there is no reason to believe that those who educate and train adults will escape easily.

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Courts traditionally have taken a broad view of what constitutes education. In fact we know that the Buckley Amendment,[2] while providing privacy rights primarily in elementary and secondary education, has also been applied to postsecondary programs. In addition, much of the education of adults is conducted by nongovernmental agencies which do not enjoy the protection of state immunity and other such defenses. The issue of professional liability for educators and trainers is a bomb waiting to explode—one for which preventive measures are imperative.

What are the general conditions under which liability occurs? We will consider these and each of the six potential causes of action as they apply to individuals who instruct adult learners in college classrooms, corporate and institutional training centers or adult programs in public schools. More importantly, we will conclude with a discussion of preventive measures that may reduce the liability of the trainer and his or her employer.

## Conditions required for liability

In order for an allegedly injured party to seek compensatory damages from an instructor or his employer, at least four elements must be proven.[3] First, the plaintiff must show that the defendant (instructor/employer) had a duty or owed a standard of care that, if adhered to, represented the minimum required to protect the learners from unreasonable risk. Second, the plaintiff must show that the instructor/employer failed to act according to that standard. Third, there must be a causal connection between the (in)action of the instructor and the resulting injury. Finally, there must be actual damages.

If any of these four elements is missing, a suit may not be prosecuted successfully. This is especially important where malpractice is concerned. In many malpractice (but not negligence) cases courts have held that there is no clear, recognizable standard of duty in educational matters. Thus educators cannot be held liable for breach of duty.[4] In certain areas of adult instruction such as medical training and the fire service, there are comprehensively articulated standards; instructors in those areas are more likely to be prosecuted successfully.

## Situations of potential liability

■ Injury in the classroom—*negligence*. Liability for injury to a student during class has been well articulated in the courts. Numerous instructors (including a chemistry professor) have been sued successfully for failure to "protect" students.[5] The instructor is viewed as the supervisor in the classroom and is responsible for minimizing risk to students. If students are injured due to the instructor's action or the failure of the instructor to take action, a successful suit is likely. However, much training involves potentially hazardous situations and trainees may assume some of the burden of risk (e.g., firefighters, chemists, petrochemical workers). Yet, the instructor may not expose students to risks that go beyond that required to accomplish the legitimate goals of training.

For example, a fire service instructor would be inviting a legal action if he or she required students to climb a ladder during an electrical storm. Obviously such an activity exposes the student to unnecessary risk and provides no benefit beyond training under less threatening conditions. Liability for negligence would result due to the action of the instructor. Similarly, an instructor who fails to warn a student of potential danger is negligent for his or her inaction, such as the welding instructor who fails to describe the perils of welding without adequate eye protection. Not only is an instructor required to provide this instruction, but liability may result from a subsequent injury because of the failure to enforce the wearing of protective gear.

■ Injury outside the classroom caused by poor or incorrect instruction—*malpractice/negligence*. Liability in this instance is considerably more difficult to establish. Such a situation might exist if a newly hired and trained mental health worker is

injured by a patient. In this case the supervisor could be held liable for failure to inform the worker of the nature of the patient. The in-service training instructor could be liable as well for failure to teach the worker how to deal with dangerous clients. Assignments of liability to the latter professional would be appropriate, especially if courses offered by that instructor or agency included such instruction by policy or tradition. Thus, a standard of care and a duty would have been established by precedent.

■ Injury to a third party caused by poor or incorrect instruction—*malpractice/negligence*. In this more complex situation, attributing "proximate cause" to the instructor would be difficult. "Educational malpractice" has been treated as an untouchable issue by courts until as recent as 1976.[6] The few cases heard by the courts in the past decade have been either dismissed or decided in favor of the defendant.

But most malpractice suits have contended general damages rather than physical harm. Courts (especially dissenting judges) have indicated that there are situations in which intervention would be likely. They include cases where a recognized standard of care exists and a casual connection can be made between the (in)action of the instructor and the damage that results from the actions of a present or former student. Such a situation would exist, for example, when a patient in a hospital is injured by improper medication administered by a worker. If the errors in administration were attributable to improper instruction (e.g., failure to inform and test) during in-service training, then the instructor might be liable for contributory negligence.

Liability might also occur in the case of an instructor who endeavors to teach fellow employees about the care and use of fire extinguishers but fails to teach them of the dangers involved in reloading extinguishers. An extinguisher explodes and an employee is injured. Is the instructor liable? Probably so, because without his instruction it isn't likely that employees would have used the extinguisher. With proper instruction and evaluation, odds are the accident would not have occurred.

The latter point is extremely important. If dangerous activities are involved, then the instructor must evaluate the performance of the students. [See "Warning: Workers at Risk, Train Effectively," p. 51] In so doing, the instructor is able to document that a later error in the former student's performance did not result from his failure to instruct properly because the student did possess, at the time, the necessary skills or knowledge.

■ Misrepresentation of qualifications of the benefit of training—*fraudulent misrepresentation*. Although this appears more vague than the previous three, there has been at least one related case in which a student was awarded $3,969 in damages based on a successful claim of fraudulent misrepresentation on the part of the teaching institution. The student alleged that the school had misled him regarding his aptitude for computer programming and the certainty of obtaining a high-paying job.[7] Similar results might occur when an HRD consultant enters an organization and instructs staff in an area in which he is unqualified.

■ Improper supervision of interns/trainees—*negligence*. Colleges, corporations, instructors and field super-


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visors must be wary of this problem. According to Kapp (1984) trainees are viewed as "unlicensed lay persons"[8] (p. 143) and any client receiving services from a trainee rather than a licensed (or certified) professional must be informed of the trainee's status. Thus, if an organization uses the services of psychology student interns, it must in turn inform its clients.

Such a situation would occur when an organization provides counseling to employees who have drug, alcohol or other problems. Perhaps the director of the counseling program has agreed to supervise psychology students who will assist him with the program. In order to minimize liability, several conditions must be met. First, clients must be informed of the trainees' status and may elect to reject any therapy. Second, there must be a formal agreement which details the responsibilities of the organization, the college and the field supervisor. Third, there must be specific guidelines for controlling the quality of the trainees' work. Finally, the task completed by the trainee must be documented and directed by the field supervisor.[9]

■ Improper communication—*breach of confidentiality or defamation.* Causes for legal action may include libel (written communication), slander (oral communication) or breach of confidentiality (written or oral). An instructor acquires a great deal of information about students. This is true in college classrooms, adult education classes, corporate and public employment training programs and in HRD consulting. An instructor may be required to communicate to others about the performance of trainees. The Buckley Amendment and the courts have outlined the rights of students insofar as that information is concerned. It is imperative that instructors realize that the Buckley Amendment also provides access to educational records for students at all levels. Therefore the instructor must take care that information placed in files is not libelous (i.e., untrue, bringing about disgrace or causing damage to the student).[10] In addition, the instructor must restrict oral communication, revealing information only to those who have a legitimate right to it such as the student's supervisor in an in-service situation. The communication must be factual and free of malice.

Consider the following: A consultant is hired by the XYZ corporation to train secretaries on newly acquired word processing equipment. One secretary has great difficulty in learning proper operation of the equipment. During a lunch break, the consultant strikes up a conversation with a supervisor in the manufacturing department. While describing his training, he mentions the secretary and refers to her as "incapable of learning." The consultant has committed several infractions. First, here is a breach of confidentiality. There was no legitimate purpose for this communication since the supervisor was not the secretary's boss. Second, it is slanderous. Had the consultant made a factual statement (that she was unable to do ABC process after two hours of instruction) he would have been guilty of only breach of confidentiality.

It would appear that errors in communication and negligence that lead to injury are the cases most likely to result in awards against the trainer. There is a history of litigation in these areas.


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# Defense Strategy

If a law suit arises, there are several defenses possibly available to trainers and organizations:

- Sovereign immunity—applies only to governmental agencies, depends on state law and is fast eroding in courts across the country. In essence it prevents private citizens from suing the government.
- Statutory immunity—applies to specific actions of specified individuals/groups. The immunity is specifically by legislative action.
- Assumption of risk—applies when trainees are voluntary and know the risks involved in training (e.g., rescue workers, police or firefighters). It does not provide protection when injury occurs due to negligence.
- Contributory negligence—applies when the action of a trainee results in part in his own injury. It does not provide total defense if the instructor's actions also contributed to the injury.
- Charitable immunity—applies to agencies or individuals who are engaged in work that is essentially charitable/nonprofit (e.g., CPR instructors for Red Cross). It only applies in states with appropriate legislation.

Malpractice in education is a recent concept. It is, however, in the minds of many educators and training professionals, fertile ground for aspiring attorneys.

### Protections and remedies

There are many actions instructors or organizations may take in order to reduce the likelihood of legal action as a result of educational wrongdoing. Some are common sense, others require some understanding of the law as described.

Several precautions are safety related. Instruct and test all students in the safe operation of equipment. Maintain written learning objectives and document each training session. [See "Warning: Workers at Risk, Train Effetively," p. 51]. Regularly check equipment to see that it is in good condition and enforce the use of protective clothing. Don't leave your class unattended while they are engaged in a potentially dangerous task.

Make sure your trainees are fit for the task. Require proof of recent physical exams prior to involving students in strenuous activity. Adapt programs to the needs of handicapped students. Remove intoxicated students who may endanger themselves and others.

Be honest with your class. If interns are used, make sure they are identified, supervised and trained. Provide students with a written description of the course and your expectations. Do not oversell the course or misrepresent your qualifications.

Finally, respect student privacy. Do not discuss one student with another, unless he or she has a legitimate right to the information. In reporting student progress, convey only facts. ("Mr. ____________ obtained a score of 6 out of 10," not, "Mr. ____________ performed at a mediocre level.")

**Errors in communication and negligence that lead to injury are the cases most likely to result in awards against the trainer**

Approximately 1200-1300 suits are brought against educators each year.[11] In addition, countless suits are brought against individuals/groups who are not formally educators but whose mission is teaching. One concerned the parent of an EST trainee who charged the trainer with negligence in the death of her son, claiming that he had died as a result of emotional stress. Causes for litigation broaden daily and absolute protection is impossible. But as one writer has stated simply, the best protection available to education and training professionals ". . . is to act in good faith as a reasonable man would act under all the circumstances."[12]

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agers demands a more integrated, individualized process that provides job assignments, role models and other workplace "events" that develop key management competencies. It is based on observations of how successful managers learn best: through the challenges, hardships, victories and role models (both desirable and undesirable) of their own work environment.

In his controversial 1971 article, "Myth of the Well-Educated Manager," J. Sterling Livingston laid some of the groundwork for "events"-based management development. "Many crucial managerial tasks are not taught in management education programs but are left to be learned on the job, where few managers ever master them because no one teaches them how. . . what takes place in the classroom often is miseducation that inhibits their ability to learn from their experience. Commonly, they learn theories of management that cannot be applied successfully in practice, a limitation many of them discover only through the direct experience of becoming a line executive and meeting personally the problems involved."[2]

Reg Revans, in his work on action learning, emphasized managers' need to learn from direct experience, where "one has something to lose by making a mistake, as well as something to gain from finding a workable solution. Exercises that involve no emotional threat teach only how to work on exercises that involve no emotional threat."[3]

When writing about transfer of learning, David Casey objects convincingly to management coursework: "If management were less of a whole-person activity and more of an intellectual activity, courses would work because the transfer would be from one cognitive activity to another. . . Transfer of learning from one whole-person experience to the next whole-person experience can only be achieved by a learning model which accepts the trauma of real management action for what it is—a bewildering and punishing assault from all sides on a person's mental, emotional, physical, and even moral capacities at the same time."[4]

## Nice work, if you can get it

The debate is not merely one of dueling methodologies. Dissenters argue that the content of traditional management education is irrelevant at best, Livingston's "miseducation" at worst.

What *should* a manager be able to do? Plan, control, staff, organize and direct are the time-honored quintet of management competencies. "None of the above" or "It depends" may be better answers.

"The mix of knowledge and skills that distinguishes successful managers depends on the set of circumstances," according to Carl Long, acting manager of management education for Mobil Oil Corporation. "It's a situational thing. Someone who manages successfully in the military may not succeed in a small, rapidly growing company like Apple Computer."

Long says managers need to be more sensitive to their environment, so that learning becomes a daily, on-the-job process, one more valuable than "learning abstract concepts at a five-day meeting away from their environment."

Likewise, British management scientists John Beck and Charles Cox call for the development of learning-to-learn skills—"metaskills" is the term they use—that help managers cope with a rapidly changing world. Managers should be made more sensitive to their own learning and development processes, say Beck and Cox, so that every experience becomes a learning experience.[5]

A five-year study of successful managers conducted by Harvard Business School Professor John P. Kotter found a "rather large gap" between the conventional notion of management functions, tools and systems and the actual behavior of effective managers. The gap is a churning moat of uncertainty, ambiguity and the "diversity and volume of potentially relevant information," as well as the "difficult human environment." Successful managers bridge the gap—figuring out what to do and getting it done—through subtle, complex techniques of "agenda setting" and "network building."[6]

Agenda setting involves developing both general and specific, loosely connected goals and plans that address long-, medium- and short-term responsibilities. Network building is a continual process of developing cooperative relationships among those people the manager believes are necessary to satisfy the agenda.[7]

A report on the study published in *Harvard Business Review* describes a successful manager's typical day as a series of seemingly random, reactive, disjointed activities, behavior that runs counter to our image of the disciplined, to-do-listed management success story. The effective managers were "adept at grasping and taking advantage of each item in the random succession of time and issue fragments that crowd [their] day[s]."[8] In other words, effective managers are skilled at getting people to accomplish what needs to be done, *in an actual business environment.*

"Management training courses, both in universities and in corporations, probably overemphasize formal tools, unambiguous problems, and situations that deal simplistically with human relationships," Kotter writes. He cites time management and "how to run meetings" seminars as examples of programs "based on simplistic conceptions about the nature of managerial work."[9]

Kotter also objects to university-based programs' emphasis on formal quantitative tools: "All evidence suggests that while they are sometimes relevant, they are hardly central" to effective managerial performance.[10]

As a turncoat from Harvard Business School, that bastion of analytical management techniques, Kotter is in good company. J. Sterling Livingston was a professor of business administration there when he wrote the following:

**It was the kind of job, not its subject matter, that helped managers learn most.**

"Preoccupation with problem solving and decision making in formal management education programs tends to distort managerial growth because it overdevelops an individual's analytical ability, but leaves his ability to take action and get things done underdeveloped."[11]

Livingston said the ability to solve problems and make decisions is "respondent behavior," and managers must excel in "operant behavior"—finding problems and opportunities, initiating actions and following through to attain desired results—that must be acquired through direct personal experience on the job.[12] "Guided practice in real business situations is the only method that will make a manager skillful in identifying the right things to do."[13]

Livingston claims managers can learn

another critical aspect—their own personal management style—only through "firsthand experience on the job."[14] He claims studying management theory is worthless, that a manager "cannot become effective by adopting the practices or the managerial style of someone else . . . What all managers need to learn is that to be successful they must manage in a way that is consistent with their unique personalities."[15]

If the requirements for successful management are so contingent on the individual and his or her circumstances, can we trust any generic model of management knowledge and skills?

Yes, according to Esther Lindsey of the Center for Creative Leadership, who participated in the center's extensive research on how executives learn, grow and change throughout their careers. When they interviewed fast-track executives to determine what knowledge, skills and characteristics contributed to their success, researchers found 16 "events" and 31 lessons learned from those events that led to successful management careers.

The 31 lessons can be grouped into four basic arenas in which effective managers must be competent:

- technical or business knowledge;
- people skills ("A tremendous array," according to Lindsey. "There's not just one interpersonal skill."):
- meeting the demands of assignments (accepting responsibility, making decisions, getting the job done);
- surviving hardships and growing as a result of them.

The kinds of events that taught these lessons, and how this information can be applied in the work place, will be discussed later in this article.

**Effective managers are skilled at getting people to accomplish what needs to be done in an actual business environment**

## Who comes first

If it seems difficult to separate what managers should know from how they should learn, it is. It is also difficult to separate what they should know from who they should be. Selection—putting the right individuals on management tracks—is critical.

It's common knowledge that not everyone can be a good manager, even those (perhaps especially those) who are most technically proficient. When technical specialists are called up to management ranks, they often cannot overcome their strong ego identification with technical competence and their need for independent responsibility, feedback and efficiency, conditions sorely lacking in day-to-day management.[16]

Many have written about how to help technical people make the transition to management, but some suggest we're trying to train people in untrainable qualities. "You may know what characteristics make a successful basketball player," says Mobil's Carl Long. "But you can't train someone to be tall. Nor can all tall people be good basketball players."

Mobil undertook an intensive study of petroleum engineers to learn the characteristics that distinguish successful career engineers from those who become successful managers. They developed a competency model, based on skill clusters, that helps recruiters in the selection process.

One cluster involves developing a network of information sources and being able to draw on them quickly. Another relates to the ability to analyze engineering principles creatively to solve problems and gain fresh insights—to consider reversing a principle to see what happens, for example. A third cluster concerns the interest and ability to influence and involve people.

Interestingly, when a group of experienced engineers were invited to suggest traits of a successful manager, their model differed significantly. They "grossly overestimated" the importance of technical knowledge, according to Long.

While technical excellence may not be the road of managerial success, most agree that a certain level of technical competence and business knowledge is essential. Hiring someone who does not know the business because he or she is a successful "professional manager" is risky, according to John Kotter. "Especially for large and complex businesses, this condition suggests that 'growing' one's own executives should have a high priority."[17]

## Creating events

If formal classroom management training has little value, and individual-driven, on-the-job development a great deal, is there any room for planned, structured management learning? Do we simply select as best we can for managerial traits, put the candidates on the job and let them develop?

Fortunately, a number of strategies exist for developing the knowledge and skills managers need, in their own environments. The Center for Creative Leadership's research points to the educational value for managers of specific kinds of events. Those responsible for management training can model developmental opportunities after these.

Four types of events were significant: assignments, other people, hardships and a catch-all category labeled "other events." The managers who were interviewed experienced these events fairly randomly and usually on the job, although some events that influenced work-place behavior took place in their personal lives.

The executives learned most from their assignments. Five kinds of assignments taught different lessons; it was the kind of job, not its subject matter, that helped managers learn most. A fix-it assignment, such as turning an ailing business around or cleaning up a troubled department, teaches lessons in building and using organizational structure and control systems, restructuring problems and making changes in product lines and reporting relationships. Such an assignment also can prompt the discovery that lateral relationships are critical, that a manager must be able to gain cooperation from people over whom he or she has no formal authority.[19]

A start-up assignment such as creating a business from scratch can teach managers what it means to stand alone, to take full responsibility, to take risks and persevere under adverse conditions.[20]

Assignments teach business knowledge, technical expertise, knowledge of the organization as a system and self-confidence, according to Esther Lindsey. But the self-confidence born of completing assignments successfully must be tempered by the humility learned from suffering "hardship" events; arrogance is a potential "derailing" characteristic identified by the study.

Is this simply another version of job rotation? No, say the center's Michael Lombardo and Morgan McCall: "Rotating

managers just to expose them to law or finance or marketing (job content) is not as valuable to them as a diversity in their *types* of experience (job circumstances). Diversity teaches more than the repetition of one type of experience even when the repetition carries with it additional responsibility or exposure to a different division or business."[21]

The lessons learned by observing other people, especially the manager's immediate boss, are also influential. The process is different from mentoring; in fact, the study found overdependence on a single advocate another derailing characteristic. Instead, it is a gradual developing of the executive's management values through a variety of role models, both "good" and "bad."

The managers reported learning more intensely from observing "bad" bosses than "good," according to Lindsey. "When they saw a boss demonstrating desirable behavior, the managers tended to tuck the lesson away for future use. The lessons learned from a really bad boss—one who was observed failing to support his subordinates, for example—were far more potent. The managers reacted strongly and immediately, and years later, still used strong words like 'I vowed to be different' in describing the incident."

"Other people" events were often where managers first witnessed the derailment qualities and their destructive potential, and so learned to watch carefully for evidence of those tendencies in their behavior.

"Hardships" events tended to change the managers by giving them a depth of understanding and a need for introspection they may have lacked previously. These important lessons taught them humility, to value mistakes as well as success, to learn from them, but to move beyond them quickly and thoroughly.

According to Lombardo and McCall, "Sixty-six percent of the executives reported either missing promotions, being exiled to poor jobs, being demoted or fired, being caught in a major conflict with a boss, contributing to a business failure, or simply being overwhelmed by the enormity of the job."[22]

"We need to value negative situations," Lindsey claims. "They are important development grounds, really powerful shapers of people."

How much meaning do the experiences of fast-track executives have for lower level managers? The center recently extended its research to include lower and middle managers; the results thus far show that the same lessons apply. "Certain events drive certain lessons," says Lindsey.

How can human resource development professionals ensure that the right kinds of events happen to people? Interview the top managers in the organization to learn the events that shaped their success, and create similar development opportunities for the "ready-soons," says Lindsey.

"It takes managerial tasks to develop managers, and there often aren't enough management positions for all those with talent. But you can give non-management personnel assignments and exposure to role models to help them develop management skills now."

Lindsey notes that creating and moni-


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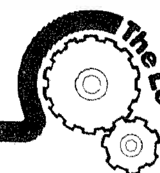


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**From Other Corners**

Many strategies apply the principles of events-based management development. Here are a few.

■ *The "ID" manual*—Marriott Corporation's Individual Development program for new hotel managers makes each participant responsible for his or her development. As explained by division training manager Jerry Goldstein, "ID trainees" are placed on a property for eight to sixteen weeks armed with a manual of tasks to be completed and signed off by appropriate coaching personnel. Informal mentoring occurs as trainees learn on the job in planned development events.

■ *The task force*—Managers and technical people with management potential collaborate on solving a problem or completing a task. Cross-skill development takes place as participants exercise internal consulting skills, analytical skills, oral and written presentation skills, team leadership skills and evolving managerial styles.

■ *The manager as developer*—A leader's orientation should be "how can each problem be solved in a way that further develops my subordinates' commitment and capabilities?" This is one of the principles of a leadership model presented by David L. Bradford and Allan R. Cohen in their book *Managing for Excellence: The Guide to Developing High Performance in Contemporary Organizations.*[27] Read the book, or its excerpt in the January 1984 issue of *Training & Development Journal*, to learn how it works.

■ *The simulation exercise*—Large-scale simulation exercises like the Center for Creative Leadership's Looking Glass present participants with dozens of problems, "not in the tidy array of a business school case study, but in the hectic disarray of a busy day's memos, meetings, casual conversations, phone calls and interruptions."[28] What simulations lack in real-work value, they make up in their telescoping of events and lessons into a few days' time. Trained debriefers help maximize the benefits of lessons learned.

toring such events offers an excellent appraisal opportunity: "Watch how potential managers react to a negative event, like a bad boss. Do they merely cope? Do they give up? Do they learn a lesson?"

Two tools are being developed for applying the center's research: an executive inventory based on the 31 lessons, and a job-analytic tool that will help determine the core demands of a job and assess what lessons a manager can expect to learn from performing it. Both tools should be ready by the end of 1985, according to Lindsey.

"Eventually we hope to marry the two tools," she says. "We'll be able to look at the available assignments and determine who's best for that job—not who's most expert at the job's demands, but who stands to develop most from performing that job."

## Mentoring revisited

While the Center for Creative Leadership's research discounts mentoring as a mangement development tool, other evidence points to its effectiveness. In *The Mentor Connection*, Michael Zey argues convincingly for mentoring as a continual, events-based, on-the-job learning experience, and a less haphazard approach to the developmental strategy suggested by the center.

Among his points: Mentoring facilitates learning by observing superiors at work because it offers a "freeze frame" opportunity—the chance to stop the mentor in progress and ask, legitimately, why he or she chose a course of action.[23]

Zey says mentoring is superior to role modeling because a good mentor involves the protege in the decision-making process; role modeling becomes role participation, an actual trying on of the managerial hat rather than mere window shopping. "Role participation is as different from role modeling as on-the-job training is from textbook learning," Zey asserts.[24]

## Don't throw out the Bricker's

"Would my education rob me of what made me a good manager?" wondered one first-year Harvard Business School student who had already been a manager.[25] Some especially strident voices aside, most would admit that formal management training, whether in an academic or corporate setting, has some value. Many believe that soft U.S. productivity calls for skill-building in precisely the analytical areas—work-level forecasting, cost analysis, resource scheduling and allocation—that a few have damned. Classroom training can even offer some valuable templates for interpersonal skills such as performance feedback and coaching and counseling.

In fact, one of the "other events" valued by the Center for Creative Leadership's successful executives was formal coursework. They said participating in courses with other managers, especially those outside their company, gave them a chance to compare their knowledge and skills with others'. They said courses could be very valuable when timed to correspond with their developmental needs, when they could study a concept one night and apply it the next day in their own environment.

Survey results promising "a revolution in management training and development" were published in a recent issue of *Training & Development Journal.*[26] Such a revolution would certainly be bloodless, as the data showed survey participants calling for the same old topics, peppered with a few new information technology requirements, using the same old methodologies.

If nothing else, data like that publicized by the Center for Creative Leadership should make human resource development professionals rethink some of the old bromides.

"Too often, trainers know a set of characteristics for good managers and simply try to train people in them," says Carl Long. "They're like a coach who wants athletes with speed, stamina and agility, who trains players in those areas and then sends them out to play without describing the game they're going to play, without teaching them the rules of the game.

"We train managers in problem-solving, planning and organizing without ever putting them in context. We have no recognition of the game they're playing; we leave that entirely up to them."

Events-based management development helps train skilled managers who know the rules of the game.

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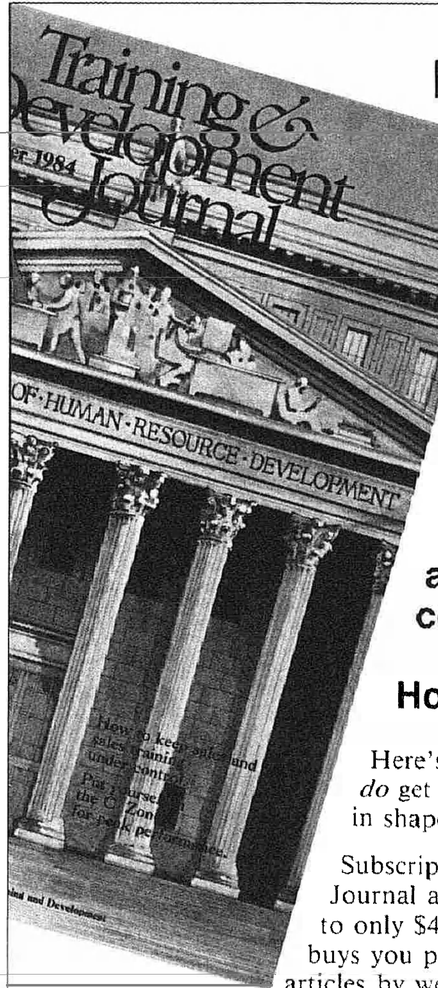


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