Rethinking Client Service: Implementing a Servant Leadership/Choice Theory Model within CMHA, Kamloops Branch

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EXECUTIVE SUMMARY

Introduction

Appropriately meeting client need within the services of a non-profit organization continues to be a challenge. The complexities of meeting client needs is the result of numerous factors. Organizations tend to define and prioritize client needs from an organizational perspective (e.g., Crane-Ross, Roth & Lauber, 2000; Gibbons, Bedard & Mack, 2005) or focus on physical and practical needs at the expense of interpersonal and relational needs (Rosenheck & La, 1997; Sun, 2012). Working with diverse clients and employees adds to the complexity as does the ongoing struggle of adequate organizational training.

These and other factors are the reasons why the Canadian Mental Health Association (CMHA), Kamloops Branch has attempted to create a Servant Leadership/Choice Theory model of client service that not only defines client needs but promotes client need always being at the forefront of its client service. CMHA, Kamloops Branch acknowledges that there however are gaps in the current working of the model. This led to the following research questions which this project attempts to answer:

- What deficits currently exist in CMHA, Kamloops Branch’s training plan that hinders staff’s capacity to meet CMHA’s priority outcome of meeting client need within this client service model?
- How can CMHA, Kamloops Branch more effectively train employees in its Servant Leadership/Choice Theory model of client service?
- What specific tools need to be implemented to improve CMHA, Kamloops Branch’s training?

Methodology

The project uses a qualitative methodology with the goal of critiquing CMHA, Kamloops Branch’s current use of its Servant Leadership/Choice Theory model of client service and providing options for moving forward in its use. Methods used included an extensive literature review on key areas such as Servant Leadership, Choice Theory, employee training and learning and client service; a semi-structured interview with the organization's Executive Director; and a web-based questionnaires that targeted employees within CMHA, Kamloops Branch's emergency shelter program. The findings from each are analyzed and compared and inform the subsequent sections of the report.
Findings and Analysis

In reviewing the literature, the researcher was unable to find instances of a combined Servant Leadership/Choice Theory model of client service. However, the literature did present useful information to define and describe both Servant Leadership and Choice Theory and potential points for conglomerating them into an effective client service model. The literature review also provided insight into the role of employees and training in effectively meeting client needs within any client service model.

Results from the semi-structured interview and web-based questionnaires provided a wealth of insight and resulted in a number of key findings. CMHA, Kamloops Branch has not effectively grounded its client service model in strong theoretical and empirical evidence. There is a lack of organizational clarity in defining both Servant Leadership and Choice Theory, in delineating key Servant Leadership competencies and Choice Theory’s needs categories and in how to join the two components together to effectively meet client need. However, employees do have some behavioural capacity within the model and in particular in meeting the four needs categories through behaviours linked to Servant Leadership. Employees also have insight into when their behaviour negatively impacts clients. These capacities are linked to the specific role that employees play within the shelter system, however linkages to the client service model are not being clearly met. Problems exist within employee training, learning and evaluation which are likely factors in these gaps. But employee buy-in for the model is there, providing a leverage point for CMHA, Kamloops Branch in moving the model forward.

Recommendations

With the project objectives and findings in mind, 2 recommendation areas were outlined. These include:

1. CMHA, Kamloops Branch Adopt an Integrated Servant Leadership/Choice Theory Model of Client Service.
2. CMHA, Kamloops Branch Design and Implement a Comprehensive Training Plan for its Servant Leadership/Choice Theory Model of Client Service.

Direction for each recommendation is provided to CMHA, Kamloops Branch to help guide the next steps in improving the effectiveness of the agency's Servant Leadership/Choice Theory model of client service.
Future Research

While CMHA, Kamloops Branch sees its Servant Leadership/Choice Theory model of client service as an appropriate choice for meeting the needs of its clients, an assessment of the approach from the clients' perspective may be appropriate. Other leadership approaches and perspectives on human needs could potentially complement the approach as well. Innovative training possibilities and performance evaluations are other areas for consideration.
CONTENTS

ACKNOWLEDGEMENTS .................................................................................................................. II

EXECUTIVE SUMMARY ............................................................................................................... III

INTRODUCTION .................................................................................................................................. III

METHODOLOGY ............................................................................................................................ III

FINDINGS AND ANALYSIS ........................................................................................................... IV

RECOMMENDATIONS .................................................................................................................... IV

FUTURE RESEARCH ..................................................................................................................... V

1. INTRODUCTION ......................................................................................................................... 9

1.1 PROJECT OBJECTIVE .................................................................................................................. 9

1.2 THE ISSUE .................................................................................................................................. 10

1.3 CURRENT CHALLENGES .......................................................................................................... 11

1.4 RATIONALE ............................................................................................................................... 11

1.5 REPORT ORGANIZATION ......................................................................................................... 12

2. BACKGROUND .......................................................................................................................... 13

2.1 CLIENT INFORMATION ............................................................................................................. 13

2.2 CONCEPTUAL FRAMEWORK .................................................................................................. 15

2.3 RESEARCH QUESTION AND OBJECTIVES ........................................................................... 19

3. LITERATURE REVIEW ................................................................................................................ 20

3.1 CHOICE THEORY AND SERVANT LEADERSHIP: AN OVERALL UNDERSTANDING .............. 21

3.2 DEFINING NEEDS AND THE FIVE NEEDS CATEGORIES ......................................................... 22

3.3 SERVANT LEADERSHIP COMPETENCIES ........................................................................... 26

3.3.1 Competency ....................................................................................................................... 26

3.3.2 Greenleaf and Spears’ Vision of Servant Leadership Competencies .................................. 26

3.3.3 Other Key Competency Frameworks ..................................................................................... 29

3.3.4 A Calling: The Link to Competencies .................................................................................. 32

3.3.5 Servant Leadership Competencies: Key Themes ................................................................. 32

3.4 THE INSTITUTION AS SERVANT ............................................................................................. 33

3.5 SERVANT LEADERSHIP AND CHOICE THEORY: LINKAGES .............................................. 34

3.6 THEORY TO PRACTICE: KEY ISSUES .................................................................................... 34

3.7 EFFECTIVE CLIENT SERVICE: THE EMPLOYEE FACTOR .................................................... 35

3.8 CLIENT SERVICE: THE ROLE OF TRAINING AND ORGANIZATIONAL CULTURE IN SUCCESS OUTCOMES ................................................................. 36

4. METHODOLOGY ......................................................................................................................... 39

4.1 RESEARCH QUESTION ............................................................................................................. 39

4.2 RESEARCH DESIGN .................................................................................................................. 39

4.3 METHODS ................................................................................................................................ 39

4.4 SAMPLE .................................................................................................................................... 41

4.5 RECRUITMENT .......................................................................................................................... 42

4.6 DATA COLLECTION ................................................................................................................... 42
7.2.1. Establish Consistent Orientation Materials and Process for New Employees across CMHA, Kamloops Branch .................................................................74
7.2.2. Build Concrete Structure and Clarity into CMHA, Kamloops Branch’s Training Program .................................................................74
7.23 CMHA, Kamloops Branch Build in Concrete Training Evaluation ..................................................................................................................76

8.0 CONCLUSION ..........................................................................................................................77

9.0 REFERENCES ..........................................................................................................................78

10.0 APPENDICES ..........................................................................................................................85

APPENDIX A: CONSENT FORM - CMHA EXECUTIVE DIRECTOR ..........................................................................................................................85
APPENDIX B: RECRUITMENT MATERIALS - INVITATION TO COMPLETE SURVEY ..........................................................................................88
APPENDIX C: INTERVIEW QUESTIONS FOR EXECUTIVE DIRECTOR ..................................................................................................................92
APPENDIX D: ONLINE QUESTIONNAIRE ..........................................................................................................................95
APPENDIX E: KEY DELIVERABLES ..................................................................................................................100

FIGURES, TABLES AND LISTS

Figure 1: CMHA, Kamloops Branch Programming .........................................................................................14
Figure 2: CMHA, Kamloops Branch Ideal Approach to Client Service ........................................................................16
Figure 3: CMHA, Kamloops Branch Current Approach to Client Service ........................................................................17
Figure 4: CMHA, Kamloops Branch Approach to Client Service: From Abstract to Concrete .........................18
Figure 5: Servant Leadership/Choice Theory Model of Client Service: Literature Review Parameters ..................20
Figure 6: Choice Theory Needs as related to the Quality World ..............................................................................23

Table 1: Sipe and Frick’s (2009) Seven Pillars of Servant Leadership ............................................................31
Table 2: Key Servant Leadership Frameworks Synthesized ..................................................................................33
Table 3: Linkages between the Literature Review, Project Deliverables and Methodology ..................................40

List 1: Greenleaf’s Initial Servant Leadership Competencies ..............................................................................26
List 2: Robert Spears’ Conceptualization of Greenleaf’s Servant Leadership Characteristics ..........................27
1. INTRODUCTION

Across the non-profit world, organizations grapple with the issue of how to appropriately meet client need within their services. As a non-profit organization, the Canadian Mental Health Association (CMHA), Kamloops Branch has attempted to tackle this issue by creating what it describes as a Servant Leadership/Choice Theory model of client. Servant Leadership argues that great leadership stems from being a servant first, by putting other people's needs above all else, thereby allowing others to grow and succeed (Greenleaf, 1977). Good Servant Leaders not only have an attitude of servitude but employ key value-based competencies within a Followership approach that enhances the capacity and desire for others to grow and succeed. The relational component between the Servant Leader and Follower is central to the leadership model. A relationship must exist, on some level, between Leader and Follower for the conditions of servitude to be possible. Choice Theory suggests that individuals have five specific needs that they are continually trying to meet (Glasser, 1998). People have individual lenses for how to best meet each need and these lenses drive their behaviour. Most people mistakenly believe within their lenses that their behaviour and reactions are shaped by things outside themselves, when in reality, people have a high level of internal control and choose everything they do. Individuals must be made aware of this and responsibility for individual choice must be placed back on the individual by helping them understand this reality and the impact it has on meeting their needs.

Servant Leadership and Choice Theory, when combined, can potentially provide a pathway to meeting client need that promotes the client being at the centre of all thinking and behaviour within an agency. Choice Theory provides insight into client needs through the five needs categories and the capacity to place responsibility on clients to meet their own needs while Servant Leadership reminds employees that their needs are secondary and outlines the means to facilitate client growth through a Followership approach within specific competencies that staff can employ to help clients recognize and meet their own needs.

1.1. Project Objective

The purpose of this report is to investigate the current operationalization and implementation of Servant Leadership and Choice Theory in client service and training at the CMHA, Kamloops Branch. Recommendations for a training model that would
effectively heighten employee understanding and capacity to implement these theories will also be made.

The study is distinctive and relevant for three key reasons: a) it examines an approach to client service that is unique to CMHA, Kamloops Branch b) it attempts to provide practical parameters to an abstract approach to client service c) it provides considerations for non-profit agencies attempting to turn theory into practice.

1.2 The Issue

In 2008, CMHA, Kamloops Branch hired a new Executive Director who determined that a new approach to client service was necessary, one that would serve the needs of CMHA, Kamloops Branch’s vulnerable and often marginalized clientele and that would ensure client needs were always at the forefront of staff’s work. Rooted in his own training and professional experience, the Executive Director promoted the use of what he eventually termed a Servant Leadership/Choice Theory model of client service within the Kamloops branch.

Servant Leadership is defined as an approach whereby great leaders serve first to ensure that people’s highest priority needs are being served so they can become “healthier, wiser, freer, more autonomous, more likely to become servants themselves” (Greenleaf, 1977, p. 27). Greenleaf, considered to be the founder of Servant Leadership, stressed the capacity to empower the least privileged in society.

Choice Theory complements Servant Leadership by emphasizing individual choice in everything we do and places responsibility for one’s choices on the individual (Glasser, 1998). It argues that as human beings, we are much more in control of our lives than we perceive ourselves to be. Therefore, the goal is to get individuals to understand why they make the choices they do and how they act relationally with others to have their needs met.

CMHA, Kamloops Branch's Executive Director argued that this model had the capacity to instill in staff a focus that remained solely on client needs so there was never a doubt in staff’s minds about who they were to serve and what behaviours encompassed that servitude. In the Executive Director’s own words,

“as opposed to supporting me looking good or the organization looking good or the program being successful, whatever the arbitrary signs of success are, it has to be about, in this instance and for these reasons, what’s good for this client or this group of clients
and that has to be the motivation that drives things” (D. Sage, personal communication, February 17, 2013).

1.3 Current Challenges

Although CMHA, Kamloops Branch has attempted to adopt this approach within its shelter program, and very sparingly in other organizational areas, the Executive Director still sees staff having difficulty in effectively implementing the model and thus identifies a lack of capacity to appropriately meet client needs (D. Sage, personal communication, February 2013). One issue appears to be a disconnect between staff’s understanding and implementation of the model. Some staff can abstractly describe the overall client-focused model verbally, but few are able to concretely define the model’s parameters to include Servant Leadership competencies or Choice Theory’s needs categories. Moreover, many staff still struggle in their capacity to behaviourally implement the model. The opposite is true for other staff who have at least some capacity to implement the model yet are unable to verbally link their behavior and approach to client service to specific components of the model.

The Executive Director believes one cause for this lack of understanding is management’s incapacity to translate its own understanding of the approach into staff training (D. Sage, personal communication, February 17, 2013). As a result, the theories have not been operationalized into formalized training thereby leaving staff with few concrete guidelines for putting the Servant Leadership/Choice Theory model into practice. Furthermore, the Executive Director has acknowledged that formal training has been minimal. New shelter staff have historically had a short 1-hour orientation with the Shelter Manager or the Executive Director before commencing training shifts at the shelter and most learning of the client service model is done organically and on the job. There is no concrete training plan in place for teaching CMHA, Kamloops Branch’s client service model, adding to the overall problem. And while CMHA, Kamloops Branch believes its employees have at least a rudimentary understanding of the client service model, this has not been assessed. Therefore, the model remains abstract and intangible, resulting in inconsistent client service.

1.4 Rationale

The purpose of this report is to investigate CMHA, Kamloops Branch’s present application of a Servant Leadership/Choice Theory model of client service to determine the strengths and gaps in implementation as well as how the model can be better trained and used within client service. This report is important to CMHA-Kamloops Branch because it will
support the agency’s goal of heightening staff capacity to implement its Servant Leadership/Choice Theory model which it believes is effective in meeting the needs categories of love and belonging, freedom, power, and fun within a leadership approach that focuses on self-empowerment and self-determination. As a non-profit agency, CMHA, Kamloops Branch has a responsibility to its clients to ensure it adequately and appropriately trains staff within its client service model, thereby providing staff with the tools necessary to both meet client needs and ensure a client’s right to autonomy. From the CMHA, Kamloops Branch perspective, staff capacity to appropriately and adequately meet client needs within a Followership mind frame is essential and argues for the significance of this project.

1.5 Report Organization

This report is organized into eight sections. Section 1 introduces the issue as it relates to the project objectives and provides contextual insight for the reader. Section 2 provides background information on the client, the conceptual framework as well as the research question and objectives. Section 3 outlines relevant literature related to Servant Leadership, Choice Theory, client service, employee characteristics and performance, as well as training and organizational culture. Section 4 provides an overview of the research methodology and discusses limitations and ethical considerations. Section 5 outlines key findings from both the online questionnaire and interview data. Section 6 discusses and analyses the findings and attempts to link the findings to the literature as well as to the specific needs of CMHA, Kamloops Branch. Section 7 presents recommendations for training and, finally, section 8 summarizes the study and outlines further research areas for CMHA, Kamloops Branch.
2. BACKGROUND

Founded in 1918, The Canadian Mental Health Association is one of the oldest national, charitable organizations in Canada as well as the oldest national mental health charity in existence (Canadian Mental Health Association, Kamloops Branch, 2012). Across the country, over 135 CMHA branches provide mental health services to more than 100,000 citizens (Canadian Mental Health Association, 2014). Each branch is locally run and a distinct legal entity, determining which programs to operate within the specific and unique needs of the singular community (Canadian Mental Health Association, Kamloops Branch, 2012). However, the CMHA adheres to one mission statement: to "promote the mental health of all and support the resilience and recovery of people experiencing mental illness. CMHA accomplishes this mission through advocacy, education, research and service" (Canadian Mental Health Association, 2014).

2.1 Client Information

CMHA, Kamloops Branch formally transitioned from the Nicola Achievement Centre to a CMHA branch in 1992 (Canadian Mental Health Association, Kamloops Branch, 2012). Since that time, CMHA Kamloops Branch has expanded its programming to include several programs (see Figure 1):

- A 35-bed co-ed low-barrier emergency homeless shelter that provides accommodation and support to men, women and children that are homeless or at risk of homelessness
- Clubhouse programs in Kamloops and Merritt for adults with a diagnosed mental illness. The goals of the program include providing stability and competence and allowing members to participate as fully as possible in the community;
- Support services including:
  - Bounce Back, Reclaim Your Health program that provides coping skills and strategies for those struggling with mild to moderate depression and anxiety;
  - Consumer Facilitation Fund that allocates funds to consumers, their families and agencies for projects and undertakings that promote self-fulfillment and mental well-being;
- Low-income housing for seniors, individuals with a diagnosed mental illness, and those in early recovery;
- Public education programs including:
  - Mental Health First Aid training which provides individuals with hands-
on practical skills to support people showing signs of mental illness
- Living Life to the Full program which introduces the five principles of cognitive-behavioural therapy and helps individuals understand their feelings and how to cope with them.
CMHA, Kamloops Branch serves Kamloops and surrounding areas including Ashcroft, Barriere, Cache Creek, Chase, Clearwater, Douglas Lake, Lillooet, Lytton, Logan Lake, Merritt, and all First Nations communities and reserves in this geographical area (Canadian Mental Health Association, Kamloops Branch, 2014). The agency has a total of 20 full-time employees, 8 part-time employees and another 21 casual staff that served over 5000 different individuals over the 2014-2015 fiscal year. It has a total operational budget of $2,356,763.20 with $1,492,265.04 of the existing budget allocated to the co-ed emergency shelter program and early recovery housing units.

The significance of CMHA, Kamloops Branch’s programs to the community is evident when one considers that shelter attendance for the 2014-2015 fiscal year was 90% or 11,497 beds used. Moreover, 728 different individuals accessed the shelter and of those, 490 individuals self-identified having issues related to substance misuse. When one considers that CMHA's focus is on mental health issues including substance use, these numbers demonstrate the high level of vulnerability and marginalization of the CMHA, Kamloops Branch clientele.

2.2 Conceptual Framework

There are key influences surrounding the researcher’s interest and involvement in this project. First, the researcher was an employee of CMHA, Kamloops Branch for over seven years and the Shelter Manager for over five years and witnessed firsthand the difficulties the agency had in its attempts to implement a Servant Leadership/Choice Theory model. There were moments in which staff demonstrated complete clarity for this model; however, the norm tended to lean toward staff struggling with how to approach clients within this model thereby leading to inconsistent and often ineffective client service. As with most non-profit organizations, the issue for CMHA, Kamloops Branch is client service and determining how best to meet client need. While many visions of client service exist, CMHA, Kamloops Branch envisioned an empowerment approach in which clients direct their choices and behaviour and the service provider is a facilitator of that process. Numerous theories could inform these goals within a client service model but Servant Leadership and Choice Theory were seen by CMHA, Kamloops Branch as providing the impetus for clients to understand how to effectively meet their own needs and take control of their own lives. This potential is the reason the Executive Director believed that a combined Servant Leadership/Choice Theory approach to client service is the most relevant approach for CMHA, Kamloops Branch as it allows its vulnerable and marginalized clientele to move away from service provider
dependence toward individual empowerment and success. This however would only be possible through client service that stemmed from intentional employee training and learning, a clear organizational culture, and delineated tasks for the shelter worker within a deliberately designed shelter environment (See Figure 2).

**Figure 2: CMHA, Kamloops Branch Ideal Approach to Client Service**

However, moving theory to practice presents its challenges, particularly within a non-profit agency that is limited in both financial and human resources. As is the case in many agencies, CMHA, Kamloops Branch introduced its Servant Leadership/Choice Theory model of client service despite the following (See Figure 3):

1. no formal assessment of whether the agency's definition and understanding of Servant Leadership and Choice Theory align with empirical research and literature
2. no concrete definitions or operationalization of Choice Theory's needs categories and key Servant Leadership competencies
3. no clear approach to meshing Servant Leadership and Choice Theory within client service
4. an informal approach to training the Servant Leadership/Choice Theory model of client service
5. no formal assessment of staff understanding of and capacity to implement a Servant Leadership/Choice Theory model of client service

![Diagram]

Figure 3: CMHA, Kamloops Branch Current Approach to Client Service

When the researcher began the Master of Arts in Community Development program, the Executive Director approached her about conducting the program’s final project on CMHA, Kamloops Branch’s Servant Leadership/Choice Theory client service model, understanding agency success with the model required a research-based approach. Effectively bridging theory into practice necessitates the capacity to empirically understand the linkages between theory, concrete behaviours and the outcomes one is looking for (See Figure 4). To allow for this possibility, theories need empirically researched constructs that are practically defined by specific behaviours and that can be linked to specific outcomes; the context of the agency needs to be clearly delineated and outlined through an empirical assessment; and the interplay of the two needs to be considered within a clear research framework that allows gaps to be assessed and that provides a means for moving forward. With these considerations in mind, the research questions and objectives were outlined.
We knew there would be challenges, specifically because the researcher at the time worked for CMHA, Kamloops Branch within an authority position. Moreover, the Executive Director was clear that the research goal would be to determine how to better train and implement the Servant Leadership/Choice Theory model; how to operationalize theory into practice. The model in and of itself was not to be assessed for its validity in meeting client need. Furthermore, only shelter employees were to be included due to their exposure to the model as other programs did not receive exposure with any level of significance.

From the beginning, the project has taken on a qualitative study approach to answer the research questions. A key research goal is helping CMHA, Kamloops Branch prioritize its training focus on how staff can meet client needs, something the literature argues most agencies spend too little time on (e.g., Crane-Ross, Roth & Lauber, 2000; Gibbons, Bedard & Mack, 2005; Rosenhack & Lam, 1997). This study has attempted to provide a non-profit organization insight into the effectiveness of its current training practices as well as provide useful tools for enhancing staff’s capacity to effectively meet client needs.
2.3 Research Question and Objectives

With CMHA, Kamloops Branch’s objectives in mind, the research questions and objectives were defined. With an understanding that the client wanted the research to begin from the standpoint of its Servant Leadership/Choice Theory model, the following research questions were decided upon:

- **What deficits currently exist in CMHA, Kamloops Branch’s training plan that hinders staff’s capacity to meet CMHA’s priority outcome of meeting client need within this client service model?**
- **How can CMHA, Kamloops Branch more effectively train employees in its Servant Leadership/Choice Theory model of client service?**
- **What specific tools need to be implemented to improve CMHA, Kamloops Branch’s training?**

Specific deliverables were outlined including:

1. Concretely defining Servant Leadership and its Competencies
2. Concretely defining Choice Theory and its Five Needs Categories
3. Assessing staff’s current understanding of a Servant/Leadership Choice Theory model of client service
4. Assessing the gaps between the literature and CMHA's understanding of both Servant Leadership and Choice Theory
5. Defining CMHA’s current training approach practices
6. Creating a training plan to better train staff within a Servant Leadership/Choice Theory model of client service
7. Increasing the Agency’s overall capacity to meet client need

This project is very practical in nature. It attempts to shift a theoretical framework into an applied model of client service, one that is both teachable and trainable. A key goal is to build on existing literature and provide a means to integrate the two models into an enriched approach to client service.
3. LITERATURE REVIEW

An extensive literature review was conducted throughout the research process. The main source of the literature review was the University of Victoria online library that provided the researcher with access to articles on scholarly databases including Google Scholar, Social Sciences Index, JSTOR and others. Keywords for the searches included: “servant leadership”, “choice theory”, “leadership styles”, “learning organization”, “client need”, “client service”, “employee-client relationship”, “non-profit learning”, "employee characteristics and performance", "non-profit training", and "organizational culture and learning". Sources were also found by examining the reference section within the articles found online. The researcher also researched appropriate scholarly books for the project and while used minimally, a small number of relevant books were included within the literature review.

Figure 5: Servant Leadership/Choice Theory Model of Client Service: Literature Review

The objective of the literature review was to explore the existing literature and provide capacity to solidly ground the research questions and create a methodology that would appropriately inform the research questions (see Figure 5). It begins with an overall theoretical perspective of Choice Theory and Servant Leadership and then provides a micro-analysis of the categories and competencies within Choice Theory and Servant
Leadership to help frame the means for moving theory into a practical client service model. The literature review explores the role of employee characteristics; training; and organizational learning and culture to determine how to tie client service to appropriate, effective training and employee learning.

3.1 Choice Theory and Servant Leadership: An Overall Understanding

No research exists on the specific use of a combined Choice Theory/Servant Leadership model in non-profit organizations to help guide CMHA’s implementation of its approach. However, it is useful to outline what both approaches are exclusive of each other. Choice Theory argues that human beings perceive their world and choose behaviours based on a reality that exists within their own minds (Glasser, 1998; Walter, Lambie, & Ngazimbi, 2008). All behaviour is defined as "total behaviour" which is comprised of four components: acting, thinking, feeling and physiology (Glasser, 1998; Walter, Lambie, & Ngazimbi, 2008; Wubbeldon & al., 2004). People have direct control over acting and thinking and indirect control over feelings and physiology. People actively decide on certain actions and thoughts which then result in feelings and physiological reactions. All behaviour originates from within; external stimuli is merely information which a person may or may not choose to act upon (Glasser, 1998; Wubbeldon & al., 2004). Human beings can and do choose almost everything they do, think, act, and feel; an understanding of this reality allows humans to be in greater control of themselves and their lives than most believe possible (Glasser, 1998). This insight provides people opportunity to both choose goals and make changes in their lives.

Choice Theory argues that people need only be in control of themselves rather than attempting to control others (Glasser, 1998; Walter, Lambie, & Ngazimbi, 2008; Wubbeldon & al., 2004). Understanding that we, as human beings, have the capacity for internal control and motivation inhibits the need to participate in external control of others and the notion of ownership, something theorists suggests is abundant without a clear understanding that individuals are in control of themselves. People need to stop trying to control others or force them to do what they believe to be right for the other individual as this pattern is merely a false means of having one's own needs met and is destructive to all parties involved. When linking that to service provision, staff and agency therefore must not fall into the trap of telling or directing client behaviour. Rather, service providers’ goal is to allow clients to determine the answer to this fundamental question: “how can I figure out how to be free to live my life the way I want to live it and still get along well with the people I need?” (Glasser, 1998, p.5).

This thinking connects well with Servant Leadership's goal of meeting others’ highest priority needs by setting aside one’s own needs to serve others and allowing them to
become healthier, wiser, freer and more autonomous (Greenleaf, 1977). Greenleaf stressed the essential role that servant leadership could play within institutions, including non-profit agencies, who work with marginalized and vulnerable clients. Greenleaf contended that good servant leaders and institutions should be able to pronounce that their servitude helped to benefit the least privileged in society. In what has been argued to be his credo (Robert K. Greenleaf Centre of Servant Leadership, 2015), Greenleaf (1977) stated:

“This is my thesis: caring for persons, the more able and the less able serving each other, is the rock upon which a good society is built. Whereas, until recently, caring was largely person to person, now most of it is mediated through institutions – often large, complex, powerful, impersonal; not always competent; sometimes corrupt. If a better society is to be built, one that is more just and more loving, one that provides greater creative opportunity for its people, then the most open course is to raise both the capacity to serve and the very performance as servant of existing major institutions by new regenerative forces, operating within them” (p.62).

Other researchers have supported Greenleaf’s assessment of a good servant leader. For example, Page and Wong (2000) contend, like Greenleaf, that the servant leader serves others by helping them develop and by promoting their well-being for the greater good and common goals. In keeping with Greenleaf’s idea of institution as servant, Russell and Stone (2002) contextualize servant leadership within an organizational model, suggesting that the goal of the worker is to position himself as a worker and wholly fulfill the needs of others. Parolina (2005) has added to the conversation by commenting that not only does servant leadership value and develop people; it builds a relational and authentic community and shares leadership. Rude (2003) states that his assessment of Servant Leadership definitions espouses defining servant leadership as “distancing oneself from using power, influence and position to serve self, and instead gravitating to a position where these instruments are used to empower, enable, and encourage those who are within one’s circle of influence” (p. 6). Thus, the literature is rich with Servant Leadership definitions that provide both an individual and organizational lens for servitude, while maintaining Greenleaf’s initial focus.

3.2 Defining Needs and the Five Needs Categories

While Servant Leadership speaks about the importance of meeting others’ highest priority needs, as an approach it does not clearly outline what these needs are. Choice Theory, on the other hand, outlines five specific needs categories: survival and reproduction, which is linked to physiology and instinct; and love and belonging; power;
freedom; and fun which are considered to be psychological needs (Glasser, 1998; Glasser, 1984; Walter, Lambie, & Ngazimbi, 2008; Wubbolding & al., 2004). Glasser (1988) contends that human beings are genetically programmed to try to satisfy all five needs categories. However, people envision needs differently due to specific lenses that they have learned about how best to meet their needs within each needs category. These lenses combined portray what Choice Theorists describe as the Quality World (see Figure 6) (Cameron, 2009; Glasser, 1998; Walter, Lambie, & Ngazimbi, 2008; Wubbolding & al., 2004). "This small, personal world, which each person starts to create in his or her memory shortly after birth and continues to create and re-create throughout life, is made up of a small group of specific pictures that portray, more than anything else we know, the best ways to satisfy one or more of our basic needs" (Glasser, 1988, p. 44-45).

Figure 6: Choice Theory Needs as related to the Quality World

What these pictures usually portray fall into three categories including the people someone most wants to be with; the things people most want to own or experience; and the systems of belief that govern people's behaviour (Glasser, 1998). The goal at any given time is to close the gap between the lens of what a person wants in his or her Quality World and what the person perceives he or she is actually getting from the outside world at any given time (Wubbolding et al., 2004). Relationships in particular are key to one's Quality World outlook (Glasser, Walter, Lambie & Ngazimbi, 2008). There are often contradictions between our Quality World lenses, those pictures of how we ideally get our needs met, leading to discomfort and difficult choices that may lead to regret as
one need is met at the expense of another need (Cameron, 2009). But at any given time, all behaviour is an individual's best choice to satisfy one or more of the needs categories within their Quality World lens.

Survival is described by Glasser as “the desire to work hard, carry on, do whatever it takes to ensure survival, and go beyond survival to security” (p.31). All people require shelter, water, and food and reproduction for life to continue (Lujan, 2015). Glasser contends that humans become aware, early on in life, of the need to survive and attempt to act in ways they believe will build up longevity.

The need for love and belonging suggests that we attempt to keep love going throughout our lives through numerous relationships and means (Glasser, 1998; Glasser, 1984; Lujan, 2015). Glasser (1998) purports that most individuals tend to have little difficulty meeting the need for belonging in friendships. Issues do seem to arise, however, once love becomes part of the equation. The need for love often leads to the creation of unhealthy relationships and behaviours in the name of love, particularly in sexual and family relationships, as people have unrealistic expectations of how others are supposed to fulfill their love and belonging needs. This is linked to the false belief that someone else controls our needs and how we feel as well as the expectation that people must act how we want them to for our needs to be met adequately. As a whole, it is the management of love and belonging that overly determines healthy or unhealthy functioning (Lujan, 2015).

The need for power extends to people gaining meaning from life when they feel in control of their environment (Lujan, 2015). People want power for the sake of power but also at varying degrees and with varying motives (Glasser, 1998; Glasser, 1984). For example, some want more power despite already having ample levels of power and will do whatever it takes to get more, even at the expense of others, including those close to them. Others gain power by working for the common good through achievement that raises the bar for others but does not necessarily take power away from them. Yet others at a minimum want to be heard, to have someone pay attention to them. This extends back to our lenses for the Quality World and how we define our needs being met (Cameron, 2009; Glasser, 1998; Walter, Lambie, & Ngazimbi, 2008; Wubbolding & al., 2004). Glasser (1998) stressed that, by itself, power is "neither good nor bad. It is how it is defined, acquired and used that makes the difference" (p.38). Those in positions of power often define reality and in doing so, often create or perpetuate situations or practices that are harmful to those with less power. This leads to greater emphasis on external control and the external world. Yet Glasser argues that within a Choice Theory ideology, people can learn that meeting one's power needs does not require wielding
power over others; quite the opposite is true as coercion is unnecessary to meet one's own power needs in society or within a relationship. Creating understanding that there is actually more power in getting along with others than trying to dominate them is a key goal within Choice Theory.

When explaining the need for freedom, Glasser (1998) states, "what we want is the freedom to choose how we live our lives, to express ourselves freely, associate with whom we choose, read and write what satisfies us, and worship or not worship as we believe" (p.12). There is a strong need for independence, to live uninhabited lives (Lujan, 2015). Glasser (1998) goes on to contend that people want to be creative, to make their own choices, to be able to satisfy their own needs without infringing on the rights of others. It is when this right is taken away that individuals tend to fight for their right to freedom (Glasser, 1998; Glasser, 1984). This is linked to external control, something attached to the need for power. The golden rule of do unto others as you have others do unto you is considered critical for satisfying both one's need for freedom and others' need for freedom (Glasser, 1998). People must be aware of their own attempts to dominate others if they want their own need for freedom to be met (Lujan, 2015).

The need for fun is connected to laughing, enjoying life, getting along with others, and learning (Glasser, 1998; Lujan, 2015). Fun is seen as especially important because learning occurs best when people are having fun (Glasser, 1998; Glasser, 1984). Glasser also considers laughing and learning to be the foundation of successful long-term relationships. Hence the need for fun, as encompassed by these characteristics, is a key ingredient in sustaining healthy human interactions and the capacity for growth. There is however another side to fun. People's unique Quality World lens for fun may be linked to behaviours that hurt themselves or others (Lujan, 2015).

According to Choice Theory, all human beings strive to have these five need categories met. However, there is overlap and linkages between the categories, creating continual internal and external conflicts. For example, the need for love emphasizes the want for relationships. Yet within relationships, individuals continually seek some level of power, thereby impeding the love and sense of belonging within that relationship (Glasser, 1998, p.37-39). Trying to balance and negotiate meeting our own needs often creates an externalized focus and belief that we are not in control of our own behaviour (Glasser, 1998). This can lead to the perception that as an individual, we are merely reacting to the external world instead of being in control of ourselves (Glasser, 1998; Glasser, 1984; Walter, Lambie, & Ngazimbi, 2008; Wubbolding & al. 2004). And in all relationships, Quality World lenses for how to ideally meet individual needs will compete, thereby setting up the conditions for control and coercion and behaviour that is perceived by the
other party as harmful to themselves or others (Lujan, 2015). The goal of Choice Theory therefore is to provide individuals with insight and tools to take back control of their lives and behaviour.

3.3 Servant Leadership Competencies

While Choice Theory provides an overview of human needs categories and how such needs are both met and negotiated within relationships, Servant Leadership and its key competencies suggest an avenue for facilitating the promotion of internal drive amongst those who struggle most with it. Training employees to contextually employ specific competencies to heighten this possibility would be fruitful.

3.3.1 Competency

According to Thach and Thompson (2007), a competency is defined as “an underlying characteristic of an individual that is causally related to effective and/or superior performance in a job or situation” (p.359). The servant leadership literature is vast and rich in competencies and frameworks. Over the past 40 years, numerous competency frameworks have been designed and researched, with both similarities and stark differences (e.g., Barbuto & Wheeler, 2006; Dierendonck, 2010; Laub, 1999; Russell & Stone, 2002; Sipe & Frick, 2009; Spears, 2004, Sun, 2012). As many as 46 Servant Leadership characteristics have been identified although there tends to be similarity and overlap amongst some of characteristics (e.g., Laub, 1999; Nandram & Vos, 2010; Russell & Stone, 2002; Sendjaya and Cooper, 2008; Spears, 2004).

3.3.2 Greenleaf and Spears’ Vision of Servant Leadership Competencies

As a starting point, we should acknowledge Greenleaf’s ideas about what specific attributes constitute a good servant leader. In his initial work, Greenleaf (1977) abstractly outlines various areas for consideration as outlined in List 1.

<table>
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<th>Language and Imagination</th>
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<tr>
<td>Withdrawal</td>
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<td>Awareness and Perception</td>
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<td>Conceptualization</td>
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<td>Healing and Serving</td>
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List 1: Greenleaf’s Initial Servant Leadership Competencies
Greenleaf’s initial ideas about Servant Leadership remained intact throughout his work, although his ideas and explanations were expanded and solidified over time. Robert Spears (2004), the former Director of the Greenleaf Center for Servant Leadership, extracted 10 specific Servant leader characteristics from Greenleaf’s original writings (See List 2).

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<td>Healing</td>
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<td>Stewardship</td>
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<tr>
<td>Commitment to the Growth of People</td>
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<td>Building Community</td>
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**List 2: Robert Spears’ Conceptualization of Greenleaf’s Servant Leadership Characteristics**

*Listening* was deemed essential to being a good servant leader (Buckhardt & Spears, 2004; Greenleaf, 1977; Spears, 2004). In Greenleaf’s assertion, a “true natural servant automatically responds to any problem by listening first...true listening builds strength in other people” (p.31). Greenleaf implored people to ask themselves whether they were really listening and whether their attitude was one of truly wanting to understand (Buckhardt & Spears, 2004; Spears, 2004; Greenleaf, 1977). Greenleaf (1977) commented that “nothing is meaningful until it is related to the hearer’s own experience. *Meaning* requires that the hearer supply the imaginative link from the hearer’s fund of experience to the abstract language symbols the speaker has used” (p.32). Greenleaf suggested using few words and ensuring the message was being clearly received by the other party. He also suggested people ponder on the idea that silence may be a better alternative to words at times.

When considering *empathy*, Greenleaf (1977) argued that “the servant always accepts and empathizes, never rejects” (p.33). Greenleaf pointed out that this acceptance and empathy was for the person, not necessarily performance or effort. A good servant leader was able to have unconditional acceptance of the person but allowed imperfection of behaviour (Greenleaf, 1977; Spears, 2004). Greenleaf suggested that those who led with empathy and full acceptance of those they worked for would likely attain high levels of trust.
Servant leaders also recognize the potential for healing in others; to help make whole those they come in contact with (Greenleaf, 1977; Spears, 2004). A by-product of this was healing within the servant leader as well. Healing, consequently, becomes a reciprocal relationship. As Greenleaf points out, “there is something subtle communicated to one who is being served and led, if, implicit in the compact between servant-leader and led, is the understanding that the search for wholeness is something they share” (Greenleaf, 1977, p.50).

Awareness meant both general awareness and self-awareness for Greenleaf (Greenleaf, 1977; Spears, 2004). A good servant leader has to show willingness for new awareness and to permit sustained awareness during disturbances and discomfort. A servant leaders’ inner serenity is the mitigating factor to such disturbances, allowing the leader to face it and not seek solace. With this comes the capacity for servant leaders to “view situations from a more integrated, holistic position (Spears, 2004, p.14).

Leadership by persuation allows for change via “convincement rather than coercion” (Greenleaf, 1977, p.44). Positional authority is secondary and an effective servant leader need not attempt to use power to incite change.

Another servant leader characteristic, according to Greenleaf, is conceptualization. In Spears words (2004), “the ability to look at a problem from a conceptualizing perspective means that one must think beyond day-to-day realities...servant leaders must stretch their thinking to encompass broader-based conceptual thinking” (p.14).

Foresight was considered by Greenleaf (1977) to be the central ethic of leadership. Greenleaf defined foresight as “a better than average guess about what is going to happen when in the future. It begins with a state of mind about now...” (p.38). Foresight is the capacity to integrate the past, present and likely consequences for a decision for the future (Spears, 2004). It is linked to intuition, a sense for what Greenleaf termed the “unknowable” (Greenleaf, 1977), which Greenleaf initially considered a servant leader characteristic. Greenleaf articulated that in most decision-making, one rarely has all the information required to make an informed decision. There is often an information gap and good servant leaders were able to “bridge that gap by intuition, that is, a judgment from the unconscious process” (p.36). This necessitated creativity and discovery and the capacity to inherently feel patterns and generalize from previous situations.

Another characteristic espoused by Spears (2004) was stewardship. According to Spears, Greenleaf viewed everyone involved in institutions including CEOs, staff and trustees as holding institutions in trust for the greater good of society (p.15). The commitment above
all is serving the needs of others, particularly through the use of openness and persuasion.

*Commitment to the growth of people* is also deemed a servant leader attribute (Spears, 2004). Underlying this commitment is a belief that people have an intrinsic value and that all people are worthy of service and growth. Nurturing growth is crucial in all individuals one serves.

Lastly, building community is essential (Spears, 2004). The servant leader’s obligation is to determine how to build community among those within a given institution. As Greenleaf points out, “all that is needed to rebuild community as a viable life form for large numbers of people is for enough servant-leaders to show the way, not by mass movements, but by each servant-leader demonstrating his own unlimited liability for a quite specific community-related group” (Greenleaf, 1977, p. 53)

### 3.3.3 Other Key Competency Frameworks

Although Spears’ framework is the one most closely linked with Greenleaf, there are others. For example, Laub (1999) argued for six key components including valuing people, developing people, building community, displaying authenticity, providing leadership and sharing leadership. Sun (2012) adopts a more psychological approach, arguing for a servant identity that encompasses both a cognitive and behavioural disposition that guides the social and organizational behaviour of servant leaders. Some researchers promote the use of Servant Leadership solely in an organizational context but do include a belief in community building (e.g., Laub, 1999; Nandram & Vos, 2010; Spears, 2004) while others feel this offers little empirically. Some researchers also tend to emphasize the relationship between the leader and follower (e.g., Barbuto and Wheeler, 2006; Sendjaya & Cooper, 2008) over the rest of the field.

One influential framework linked to Spears and Greenleaf is Barbuto and Wheeler’s (2006) five-dimension construct framework specifically tied to organizational effectiveness. The five key traits include altruistic calling, emotional healing, wisdom, persuasive mapping, and organizational stewardship. Altruistic calling describes a leader’s “deep rooted desire to make a positive difference in others’ lives” (p. 318). Leaders are there to serve, put others’ needs ahead of their own, and work diligently to meet followers’ needs. Emotional healing is defined as a “leader’s commitment to and skill in fostering spiritual recovery from hardship or trauma” (p.318). Empathy and listening skills are essential to facilitate healing. Safety is paramount to promote people having a voice. Closely linked to Greenleaf’s notions of foresight and awareness, wisdom supports the idea of both awareness of what is going on around you and the capacity to
anticipate consequences. Persuasive mapping describes how leaders use sound reasoning and mental frameworks to conceptualize possibilities and opportunities. Lastly, organizational stewardship looks at the extent that “leaders prepare an organization to make a positive contribution to society through community development, programs, and outreach” (p. 319). Taking responsibility for the well-being of the community is central. Melchar and Bosco (2010) built on this model’s validity, arguing that wisdom, organizational stewardship and altruistic calling in particular were key factors to creating an organizational culture of servant leadership.

Dierendonck (2011) also attempted to synthesize the existing servant leadership literature and came up with the six characteristics of humility, authenticity, interpersonal acceptance, stewardship, providing direction, and empowering and developing people as they relate to organizations. Dierendonck uses Patterson’s (2003) definition of “the ability to put one’s own accomplishments and talents in a proper perspective” (p. 1233) to describe humility. Servant leaders understand they are not experts; others have useful information to help them. It is about modesty. Leaders put others’ interests first, and do not look for accolades for others’ accomplishments. Authenticity describes expressing oneself in ways that are consistent with one’s inner thoughts and feelings. Integrity and honesty are paramount. Interpersonal acceptance is linked to empathy as it is the ability to understand and experience the feelings of others and where they are coming from. One can let go of transgressions and forgive. Providing direction “ensures that people know what is expected of them” (p. 1234). Stewardship is the willingness to take responsibility for the larger institution and to do so within a servitude model over a control and self-interest model. Leaders are both caretakers and role models. Lastly, empowering and developing people is linked to enabling individuals but within a proactive, valuing perspective. “It is all about recognition, acknowledgement, and the realization of each person’s abilities and what the person can still learn” (p.1233).

Sipe and Frick (2009) designed a Servant Leadership framework directly linked to organizational outcomes and client service. Sipe and Frick provide what they term the Seven Pillars of Servant Leadership including Person of Character, Puts People First, Skilled Communicator, Compassionate Collaborator, Foresight, Systems Thinker, and Leading with Moral Authority. Each pillar encompasses three key characteristics as outlined in Table 1.

Sipe and Frick go beyond many frameworks by outlining what they argue are a set of concrete, observable competencies that can provide structure to an organization’s implementation of Servant Leadership.
Table 1: Sipe and Frick’s (2009) Seven Pillars of Servant Leadership

| 1. Person of Character | Makes insightful, ethical, and principle-centre decisions  
|                        |   • Maintains integrity  
|                        |   • Demonstrate humility  
|                        |   • Serves a Higher Purpose |
| 2. Puts People First   | Helps others meet their highest priority  
|                        |   • Displays a Servant’s heart  
|                        |   • is Mentor-Minded  
|                        |   • shows care and concern |
| 3. Skilled Communicator| Listens earnestly and speaks effectively  
|                        |   • demonstrates empathy  
|                        |   • invites feedback  
|                        |   • communicates persuasively |
| 4. Compassionate Collaborator | Strengthens relationships, supports diversity, and creates a sense of belonging  
|                             |   • expresses appreciation  
|                             |   • builds teams and communities  
|                             |   • negotiates conflict |
| 5. Foresight           | Imagines possibilities, anticipates the future, and proceeds with clarity of purpose  
|                        |   • visionary  
|                        |   • displays creativity  
|                        |   • takes courageous and decisive action |
| 6. Systems Thinker     | Thinks and acts strategically, leads change effectively, and balances the whole with the sum of its parts  
|                        |   • comfortable with complexity  
|                        |   • demonstrates adaptability  
|                        |   • considers the “greater good” |
| 7. Leads with Moral Authority | Worthy of respect, inspires trust and confidence, and establishes quality standards of performance  
|                              |   • accepts and delegates responsibility  
|                              |   • shares power and control  
|                              |   • creates a culture of accountability |
3.3.4 A Calling: The Link to Competencies

Greenleaf (1977) contended that Servant Leadership goes beyond competencies; that it is an internal calling, a way of being that leads to a conscious decision to serve. And many theorists agree with him (e.g., Barbuto & Wheeler, 2006; McGee-Cooper, 1998; Sipe & Frick, 2009; Wheatley, 1999). Ng and Koh (2012) suggest that this calling arises from the relationship between one's personality, value orientation and prior experiences with other servant leaders. Thus, not everyone is equally capable of becoming a good servant leader or of wholly meeting the requirement of internalized servitude. This calling is also linked by theorists to the capacity to be skilled in certain competencies including awareness (Greenleaf, 1977; McGee-Cooper, 1998; Spears, 2004), listening (Greenleaf, 1997; Sipe & Frick, 2009; Spears, 2004), complete and unconditional acceptance of others (e.g., McGee-Cooper, 1998; Stone, Russell, & Patterson, 2004) and a commitment to service for others’ greater good; and for something greater than oneself (e.g., Greenleaf, 1977; Sipe & Frick, 2009; Spears, 2004) to be at the forefront of servant leadership.

3.3.5 Servant Leadership Competencies: Key Themes

Patterson (2003) questions the capacity of Servant Leadership to become anything more than a theoretical concept due to disagreements among researchers on competencies. However, DiStefano (1988), Beazley and Beggs (2002) and Frick (1998) contend that discord and difference between some Servant Leadership competencies must exist if we are to recognize the individuality and individual experience of Servant Leaders and consider the role their personal journey has on them becoming a Servant Leader. Moreover, different competencies may be relevant to different Servant Leaders in different contexts and situations, providing much needed flexibility when serving the needs of complex, diverse individuals.

When considering the various frameworks and the literature as a whole and despite over 50 competencies being found within the literature, a number of simple themes present themselves that directly link back to Greenleaf’s initial work (See Table 2). First, there is understanding that a good servant leader must at the very least have a value system linked to the notion of servitude and followership, one that permits an individual to perhaps more easily participate in certain competencies. In keeping with Greenleaf’s (1977) initial ideas, communication and listening in particular is identified as an essential servant leader attribute (Barbuto & Wheeler, 2006; Dierendonck, 2011; Greenleaf, 1977; Laub, 1999; Sipe & Frick, 2009; Spears, 2004). Putting the needs of others above all else is also prevalent throughout the models, as is the attribute of committing to the growth of others. Empathy is also found within the majority of frameworks (Barbuto & Wheeler, 2006; Dierendonck, 2011; Greenleaf, 1077; Laub, 1999; McGee-Cooper, 1998; Sipe &
Frick, 2009; Spears, 2004; Stone, Russell, & Patterson, 2004). And the promotion of stewardship (Barbuto & Wheeler, 2006; Dierendonck, 2011; Greenleaf, 1977; Sipe & Frick, 2009; Spears, 2004) as well as the capacity for a level of foresight and awareness are dominant themes (Barbuto & Wheeler, 2006; McGee-Cooper, 1998; Sipe & Frick, 2009; Spears, 2004; Stone, Russell, & Patterson, 2004). Although there are numerous other themes linked to servant leadership, these key themes are found throughout the major frameworks.

Table 2: Key Servant Leadership Frameworks Synthesized

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<td>Listening</td>
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<td>Listening</td>
<td>Emotional Healing</td>
<td>Skilled Communicator</td>
<td>Interpersonal Acceptance Humility</td>
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<td>Empathy</td>
<td>Emotional Healing</td>
<td>Skilled Communicator</td>
<td>Interpersonal Acceptance</td>
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<tr>
<td>Putting the needs of others first</td>
<td>Followership</td>
<td>Values</td>
<td>Altruistic Calling</td>
<td>Puts People First</td>
<td>Humility</td>
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<tr>
<td>Commitment to the Growth of People</td>
<td>Potential for Healing in Others; Commitment to the Growth of People</td>
<td>Develops People</td>
<td>Potential for Healing in Others; Commitment to the Growth of People</td>
<td>Emotional Healing</td>
<td>Puts People First</td>
<td>Empowering and Developing People</td>
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<td>Stewardship</td>
<td>Stewardship</td>
<td>Builds Community</td>
<td>Organizational Stewardship</td>
<td>Leads with Moral Authority</td>
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<td>Foresight</td>
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<td>Provides Leadership</td>
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<td>Awareness</td>
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3.4 The Institution as Servant

Greenleaf (1977) was clear that Servant Leadership extended to institutions as a whole, not just leaders. Institutions have a responsibility to create a more just, equal society through servitude. Greenleaf (1977), among others (e.g., Laub, 2010; Parolini, 2005), suggest that leadership that produces an effect on society is created and designed through institutions. Servant leadership must run through both the leaders and the institution to solidify its capacity to serve those less fortunate and shift society in meaningful ways. It becomes piecemeal of the organizational culture and becomes valued and practiced by both leaders and their subordinates. Organizations that can create a culture of servitude can maximize the skill sets of both leaders and workers within the organization (Laub, 1999; Parolini, 2005). Patterson (2003) reminds us that a key component of servant leadership is the focus on the followers' needs over the
organizations' needs. The organization is merely the grounds for servitude; the organization's need must remain secondary.

Spears' (2004) ten Servant Leadership characteristics were also seen as integral to the institution as servant. Buckhardt and Spears (2004) contend philanthropic institutions must make extra efforts within each characteristic to ensure the needs of the most vulnerable and marginalized are met. For example, non-profit organizations must work hard to take down barriers to real communication, listening and a commitment to the growth of those they serve.

3.5 Servant Leadership and Choice Theory: Linkages

Although Servant Leadership and Choice Theory are two distinct theories, there are key linkages between espoused Servant Leadership characteristics and meeting client needs. While servitude in meeting client’s overall needs is evident, meeting specific needs can be linked to attributable servant leadership qualities. For example, Ferch (2012) argues that the nucleus of servant leadership encompasses numerous characteristics including humour, love and the appropriate use of power which tie into Choice Theory. Patterson (2012) and Autry (2004) both promote the role of love in Servant Leadership work as a means of successfully helping others move forward. And other theorists either directly or indirectly link servant leadership characteristics to the four needs categories (e.g. Sendjaya, 2012; Lujan, 2015). Another key linkage is Bruce & Winston's (2005) argument of the role that power can have in either creating or diminishing organizational trust for individuals served.

3.6 Theory to Practice: Key Issues

When considering the two models, Choice Theory is rooted in a psychological model that lends itself to therapeutic techniques for changing behaviour (Glasser, 1998; Glasser, 1984; Walter, Lambie, & Ngazimbi, 2008; Wubbolding & al., 2004) while Servant Leadership is rooted in a specific leadership philosophy driven by key competencies that can be defined and described within a specific approach to service (e.g., Barbuto & Wheeler, 2006; Greenleaf, 1977; Laub, 2010; McGee-Cooper, 1998; Sendjaya & Cooper, 2008; Sipe & Frick, 2009; Wheatley). The literature on the two areas provide a useful starting point for determining the relevance of each model alone and combined to client service.

Literature from a variety of fields and backgrounds demonstrates that service providers tend to ignore both defining and prioritizing need from a client’s perspective, often resulting in incongruence between staff and client assessment of client needs (e.g., Crane-
Ross, Roth & Lauber, 2000; Gibbons, Bedard & Mack, 2005; Rosenheck & Lam, 1997). And other research has emphasized that service providers tend to prioritize physical and practical needs such as food, housing, clothing, and service access, with little regard for the importance of interpersonal and relational needs to overall client success outcomes (e.g., Rosenheck & Lam, 1997; Sun, 2012).

This supports Zuffery and Kerr’s (2004) argument that client experience and identity must be factored into all practice, policy and relationships with clients if service providers are to appropriately meet client need and adequately shift toward more client-focused practice. What has not been supported yet, however, is whether Choice Theory and Servant Leadership can be effectively implemented within an agency to mitigate some of these key issues non-profit and governmental agencies are facing around meeting client need. On the surface, however, this model appears to hold promise for mitigating some of these issues.

3.7 Effective Client Service: The Employee Factor

A key consideration in what creates effective client service within any organization is the impact of employees. Numerous factors related to employees are known to play a role in both organizational and client outcomes. One such factor is the link between individual employee traits and client service. King, George and Hebl (2005) attempted to link the Five-Factor Traits model to helping behaviour that helped the organization and operations run smoothly and found a correlation between helping behaviour and the specific traits of conscientiousness and agreeableness. As a whole, research does tend to demonstrate that employee traits and characteristics that mesh with a non-profit’s overall approach to service result in employee retention and meeting agency goals (e.g., Brown & Yoshioka, 2003; Kim & Lee, 2007). Furthermore, literature examining employee motivation for being in the non-profit field has demonstrated the importance of intrinsic motivation and the capacity to work with others as key to employee retention (e.g., Schepers et al., 2005; Buelens & Van den Broeck, 2007).

The employee-client relationship is also argued to be a factor in success outcomes. Benjamin (2012) stresses that most non-profit outcome measurements focus primarily on program activities completed thus omitting the relational components of frontline work. He asserts that non-profit agencies may not be capturing a real picture of the link between employee work and client outcomes and provides a few essential relational areas such as listening, being responsive to client need, and linking clients to services. The literature points to the need for more research that determines the direct links between employee performance and approach and meeting client need. For example,
Heintzman and Marson’s (2005) article points out that research has stressed the relationship between management performance and employee satisfaction but that the employee-client link still remains an area that is largely ignored. The article stresses a possibility between employee engagement and client satisfaction and promotes further research being done. Some newer research has also started to focus on the impact of relationship building between employees and clients for meeting client need. For example, a study by Chen and Ogden (2012) discussed worker’s relationship building with homeless individuals as a means of influencing motivation for stable housing. Creating what they defined as a nonauthoritative, humanistic approach, staff who followed client lead, related to clients in an informal manner and who were flexible were crucial to client success outcomes of housing and effectively meeting interpersonal needs.

3.8 Client Service: The Role of Training and Organizational Culture in Success Outcomes

A key factor in successfully meeting client needs within any client service approach is the capacity of employees to effectively work within a client service model. Heightening that possibility through intentional employee training of the client service model is essential. However, numerous factors need to be considered as an agency designs its training program including an ideology of prioritizing employee training. According to Wentland (2007), a commitment to putting employees first and developing high quality training programs that are linked to strategic objectives is impactful on meeting client need. Although Wentland links this approach to the for-profit realm, the same premise likely holds true in the non-profit world. Wentland (2003) also points out that training goals need to consider the balance between what training is actually required and organizational constraints linked to training including time, human, and financial resources. Thus, a realistic plan that offers high quality training with organizational constraints is the goal.

Designing a realistic organizational training plan however is only one factor. A second consideration is designing the conditions to enhance the potential that knowledge from the classroom translates into new workplace behaviours, something research suggests is often a challenge (Ford, 2009). Employers tend to overemphasize their capacity for training information and its subsequent transfer into practice by employees. Thus, agencies need to implement techniques that can help with retention such as providing a reasonable amount of training/knowledge; realistic expectations for material retention; active training experiences; and follow-up sessions that reinforce training. Evaluation through pre- and post-learning activities is also helpful. Such ideas were reinforced by Groff’s (2006) study of a female-oriented non-profit that demonstrated similar findings on
the role that reinforcement and post-assessment evaluation can have in shifting behaviour.

Individual versus group training also needs to be considered. While benefits can be found in both, one study from the United Kingdom found the individual learning practices (ILP) were substantially more relevant within the non-profit sector whereas team learning practices were more significant in the for-profit sector (Birdi, Patterson & Wood, 2007). This suggests the need for both a structured group plan but also training that directly feeds into individual needs and strengths.

Individual investment may also be relevant within both hiring and training. For example, Groff (2006) found learner investment in the training process is key to learning retention and a shift in behaviour. Learning happens when people embrace an idea, concept or orientation. Thus, a correlation between investment and learning is evident. Individual managers or authority figures can also support this investment through a personal motivation-to-serve or an "inclination or willingness to promote the interests of his or her subordinates" (Ng & Koh, 2012, p.95) which tends to promote greater individual investment amongst workers.

Intentionally establishing a Servant Leadership organizational culture can also facilitate employee learning and investment in client service. Van Dierendonck (2011) contends that, for Servant Leaders to thrive, organizations must ingrain a humane orientation within their organizational culture described as “the degree to which an organization or society encourages and rewards individuals for being fair, altruistic, friendly, generous, caring and kind to others” (p.1246). This idea is further supported by Russell and Stone (2002) who suggest that both organizational communication and employee attitude within organizational culture can either hinder or facilitate others adhering to a servant leader approach. And Melchar & Bosco (2010) directly link the modeling of Servant Leadership by trusted managers to the creation of an organizational culture which supports the development of Servant Leadership amongst lower-level managers.

The role of trust within a Servant Leadership organizational culture also needs to be considered. Sun (2012) posits that trust and support are essential in that they provide the conditions necessary within a high social-context environment for servant leader behaviours to flourish. Yet the opposite can also be true. A servant leadership model can support the creation of greater organizational trust amongst employees. However, Sun (2012) does caution that organizations need effective leadership and organizational success necessitates a balance between the social-context and the performance-context. In making this argument, Sun reminds us that focusing too heavily on leadership and
ignoring outside influences can be detrimental to an organization’s goals including appropriately meeting client needs.

An article by Becker, Antaur and Everett (2011) also stresses the potential role that employee management performance systems can have in helping an organization better meet its goals. They and others (e.g., Fletcher 2011; Shields, 2007) envision a feedback mechanism to individual employees or groups of employees that promotes an effective employment relationship including consultation with staff and measurement rooted in the organization's specific context, values and mission. This is seen as a means to heighten agency capacity to meet its overall goals and mission.

An agency however needs to specifically delineate the skills, knowledge and abilities required as well as outline acceptable behaviour and what outcomes will be appraised (Becker, Antaur, & Everett, 2011; Shields, 2007). The following may be considered: inputs (competencies), processes or the way in which these inputs are applied (behaviours), and outputs (results) (Becker, Antaur & Everett, 2011, p. 257). Processes such as action planning; informal feedback; learning and formal review; and diagnosis may also be included.

Performance management creates greater linkage between the organization’s mission, philosophy, overarching goals and appropriate training. Harvey (1998) supports this contention, albeit from a more theoretical standpoint, arguing that organizations with service excellence focus on a clear purpose; a reciprocal commitment to excellence between staff and management; flexibility and adaptability; and serving client needs via organizational goals that directly factor in the goals of the people it serves. This necessitates feedback from clients as well as attentiveness and responsiveness from the organization as a whole.
4. METHODOLOGY

4.1 Research Question

The research project was designed to determine how CMHA, Kamloops Branch can better train its Servant Leadership/Choice Theory model of client service. As outlined in the introduction, the research questions were as follows:

- What deficits currently exist in CMHA, Kamloops Branch’s training plan that hinders staff’s capacity to meet CMHA’s priority outcome of meeting client need within this client service model?
- How can CMHA, Kamloops Branch more effectively train its Servant Leadership/Choice Theory model of client service?
- What specific tools need to be implemented to improve CMHA, Kamloops Branch’s training plan?

4.2 Research Design

A qualitative design was chosen and used for the research. Roller and Lavrakas (2015) contend that qualitative research is about making connections through in-depth qualitative research designs that reveal complexities and intricacies. Qualitative research designs allow for flexibility and a context-driven process as well as facilitates meaning being drawn from the data (Lavrakas, 2015; Rosaline, 2008). It also allows for the illumination of process (Rosaline, 2008). A qualitative research design was therefore appropriate as the research sought to untangle context to understand meaning within behaviour and determine paths forward for training.

4.3 Methods

Various methods were employed in the research. The first method employed was an extensive literature review on Servant Leadership, Choice Theory, employee-client relationship building, client service, employee training, organizational learning and culture and other relevant research areas. The literature review was essential to providing both the researcher and the client a better understanding of the research areas and how they relate to the current struggles within the organization's training of its Servant Leadership/Choice Theory model of client service. The literature review also helped guide the final project deliverables and helped inform the methodology and the design of an interview and web-based questionnaire (see Table 3).
**Table 3: Linkages between the Literature Review, Project Deliverables and Methodology**

<table>
<thead>
<tr>
<th>Literature Review</th>
<th>Deliverables</th>
<th>Methodology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choice Theory and Servant Leadership: An Overall Understanding and Key Linkages</td>
<td>Define Servant Leadership and Choice Theory; Assess the Gap between the literature and CMHA, Kamloops Branch</td>
<td>Employee and Executive Director understanding of Choice Theory; Employee and Executive Director understanding of Servant Leadership</td>
</tr>
<tr>
<td>Choice Theory's Five Needs Categories</td>
<td>Define the Five Needs Categories</td>
<td>Employee and Executive Director capacity to define and describe needs categories; Employee and Executive capacity to outline effective and ineffective examples of meeting client need as related to client outcomes</td>
</tr>
<tr>
<td>Servant Leadership Competencies</td>
<td>Define Servant Leadership Competencies</td>
<td>Employee and Executive capacity to define and describe Servant Leadership competencies; Employee and Executive Director capacity to outline effective and ineffective examples of using Servant Leadership competencies as related to client outcomes</td>
</tr>
<tr>
<td>Theory to Practice</td>
<td>Create linkages between theory and model implementation</td>
<td>Employee and Executive Director capacity to turn abstract concepts into practice</td>
</tr>
<tr>
<td>Employee Factor in Client Service</td>
<td>Employee learning; Agency capacity within the client service model</td>
<td>Employee learning; Employee training; Employee skill set; Employee motivation and fit to client service model Employee and Executive Director perception of the shelter worker role, tasks and shelter environment</td>
</tr>
<tr>
<td>Training and Organizational Culture</td>
<td>Creating a training plan; Agency capacity within the service model</td>
<td>CMHA training plan and its effectiveness as related to the client service model; Employee training preferences; Employee perception of client service model effectiveness; Management’s role in training; Employee buy-in</td>
</tr>
</tbody>
</table>

The researcher conducted one semi-structured interview with the former Executive Director of CMHA, Kamloops Branch and used a web-based questionnaire with employees specifically working within the emergency shelter program. The semi-structured interview consisted of 39 open-ended questions while the web-based questionnaire encompassed 40 open-ended questions. The questions used in the two tools were
comparable, done intentionally to provide capacity to compare data from the Executive Director with data from employees. It is notable that both the semi-structured interview and the web-based questionnaire did not use the words "Choice Theory" because initial conversations with the Executive Director and the researcher's professional experience within the agency demonstrated that staff were not provided that context for the needs categories. Instead, employees knew this component of the model as the "four needs categories" within client service.

The researcher submitted an ethics application to conduct this research to the University of Victoria Research in Human Ethics Committee and attained final approval on November 15, 2013.

4.4 Sample

Purposive sampling was used because participant selection was intentional and limited in scope by the research parameters that required participants to have at least some knowledge and training specifically within CMHA, Kamloops Branch's Servant Leadership/Choice Theory model of client service. According to Daniel (2012), purposive sampling is defined as “a nonprobability sampling procedure in which elements are selected from the target population on the basis of their fit with the purposes of the study and specific inclusion and exclusion criteria” (p. 88). CMHA, Kamloops Branch shelter staff were thus targeted as participants. The Executive Director was chosen as the exclusive expert on the model from a management/administration perspective and thus was the sole participant in the interview component of the research.

A total of 25 CMHA, Kamloops Branch employees were recruited via a third party recruiter for participation in a web-based questionnaire, with 19 individuals actively participating, at varying levels, in the questionnaire process. In line with a purposive sampling model, individuals employed within the emergency shelter program were specifically recruited because of their active engagement with the agency’s Servant Leadership/Choice Theory client service model as well as the degree of vulnerability and marginalization of the clients served at that location. Each employee at the emergency shelter location had been at least minimally introduced to the Servant Leadership/Choice Theory approach either through exposure at staff meetings or a new hire orientation meeting with the Executive Director or Shelter Manager. This could not be said for those employed in other CMHA, Kamloops Branch locales.
4.5 Recruitment

For the one interview conducted with the Executive Director, the research parameters were outlined and a consent form was provided for his perusal. The Executive Director agreed to participate and signed the consent form which stipulated consent for the current project as well as use of the interview data for future projects.

Recruitment of CMHA, Kamloops Branch employees was a more complicated process due to the researcher’s direct managerial relationship to the staff being recruited. Potential participants were contacted and recruited by a third party recruiter. Participants were made aware of their voluntary participation and the mechanisms in place to safeguard their confidentiality and anonymity throughout the process. It was explained that participation in the questionnaire, no matter how minimal, demonstrated implied consent. At no time did participants sign any documentation that would enable them to be identified. It was also highlighted that participation in the web-based questionnaire implied consent to use their data in potential future research.

4.6 Data Collection

4.6.1 Interview

The interview was conducted in the Executive Director’s office. The researcher asked the participant a total of 39 open-ended questions with a number of sub-questions related to the initial question. The questions focused on the participant's understanding of the overall model; how the Servant Leadership/Choice Theory characteristics were to be expressed behaviourally; the shelter worker's role and the shelter environment; and CMHA, Kamloops Branch’s training program. The interview lasted a total of 63 minutes and was recorded with the participant's written consent. It was then transcribed for the researcher’s use in data analysis.

4.6.2 Web-Based Questionnaires

A total of 19 web-based questionnaires were collected using FluidSurveys. Similar to the interview questions, the questionnaire focused on participants’ understanding of the overall model; how Servant Leadership/Choice Theory characteristics were to be expressed behaviourally; the role of shelter tasks and environment in client service; management's role in the agency and client service model; employee training and learning; and organizational culture. Response rate to questions greatly varied with three participants answering all the questions, four participants answering all but one question and the other respondents answering anywhere from one to 25 questions. Within the 19 respondents, a total of 11 respondents answered less than half the questions. An average
of nine individuals answered each question, with early questions being answered at a greater rate than questions near the end of the questionnaire. A clear pattern in the questionnaire was less response rate to the pseudo critical incident questions that asked for descriptions of ineffective or poor behaviour within the Servant Leadership characteristics and the need categories.

4.7 Data Analysis

Numerous techniques were used during the content analysis phase of the research. For certain questions, basic qualitative coding was established in which specific words were counted. This was relevant for questions specifically asking participants to identify given categories. For much of the data, however, thematic analysis was used in conjunction with basic coding. As outlined by Guest, MacQueen and Namey (2012), thematic analyses go beyond just counting words or phrases and focuses on “identifying and describing both implicit and explicit ideas within the data, that is, themes” (p.10). The nature of the research necessitated moving beyond basic coding to explore themes inherent within the data. Because themes are considered “outcomes of coding, categorization, or analytic reflection, not something that is, in itself, coded” (Saldana, 2013, p. 14), the researcher attempted to conduct basic coding with the goal of pulling out themes that were useful to the research. This technique was also particularly useful when comparing data collected from the former Executive Director to data collected from the shelter employees.

The researcher also utilized a pseudo-critical incident technique in an attempt to pull out participants' understanding of both Servant Leadership characteristics and the needs categories as outlined under Choice Theory. This technique was considered relevant due to the fact that "it is a qualitative, systematic open-ended technique for educing descriptive data from participants as well as being an effective naturalistic tool for focusing participants on a specific event" (Sharoff, 2008, p. 301). However, given the form of the responses, the limited use of incidents to pull from and the incapacity to ask for clarification from respondents, the technique was used loosely within a thematic analysis approach.

4.8 Limitations

As with any research project, limitations can be found. First, the relationship of the researcher to the research participants may have had an impact on the data collected. Although this can’t be confirmed, the researcher acknowledges that the responses provided may be positively or negatively skewed as a result of this relationship. The minimalist data received from some participants potentially implies concern with participation. This was deduced because questions which asked for a demonstration of
inappropriate or inadequate behaviour in the workplace were answered less often than those asking for examples of positive behaviour. Moreover, other questions asking for critical feedback around management were often lacking in numbers or information. The researcher’s supervisory role may be tied to this. However, numerous participants did provide answers to these questions, arguing that attempts to mitigate this concern through the use of a Third Party Recruiter and anonymous web-based questionnaires were at least partially successful.

The length of the written questionnaire may also be seen as problematic. Only 11 participants went through the entire questionnaire and 8 participants’ responses were between 1 and 11 questions. In hindsight, the researcher did not adequately estimate the length of time it would take participants to fill out the questionnaire which perhaps led to a reduction in response for many of the questions. No pre-testing was done which could have identified this an issue and is a critical lesson learned for future research. The web-based questionnaire however was designed to allow participants to fill out it over multiple sessions rather than requiring them to answer all the questions in one sitting. Participants were also given a number of weeks to participate in the research. Thus, the lack of participation by some respondents may be due to other factors.

The choice of purposive sampling and the resulting sample size may be both a limitation and a strength. Purposive sampling was chosen because only CMHA, Kamloops Branch shelter staff fit the research parameters. This excluded other CMHA, Kamloops Branch staff, resulting in a limited number of potential participants to choose from. This may be considered a limitation as the research results are not representative of the entire agency. However, it is also a strength as the sample was chosen to ensure useful data could be collected. Choosing participants outside the shelter setting would have skewed the results, limiting the value of the data and the research for CMHA, Kamloops Branch.

There are also some limitations with the critical incident technique used within the research. Anderson and Wilson (1997) outline the importance of providing training to those filling out critical incident techniques. Due to the requirement of respondent anonymity, no such training could be provided. The researcher attempted to account for this constraint by providing clear directions for how to appropriately answer the questions and maintaining consistency in the wording of questions. In numerous instances, opinions were provided, diminishing the capacity for rigour when analysing the incidents. The researcher was also unable to ask for clarification from respondents due to the anonymous nature of the research. Although a less rigour form of analysis was conducted on these questions than the researcher had hoped for, the data provided did
fit well with a thematic analysis approach that allowed valuable findings to be extrapolated.

Finally, the researcher’s extensive knowledge and involvement with CMHA, Kamloops Branch as a whole could be considered a limitation as well as a strength. The researcher acknowledges the difficulty of looking at the data collected through a fresh, objective lens, having operated the shelter program for over 5 years. The researcher was aware of some of the data provided and also struggled, at times, to see the data at face value and not read more into it due to her involvement in the program. While this perhaps contributed to a level of subjectivity in certain instances, it also permitted context to some data which may or may not be considered a strength.
5.0 FINDINGS

This section outlines the findings from both the web-based questionnaires filled out by shelter employees and the interview with CMHA, Kamloops Branch's former Executive Director as well as attempts to compare the findings within the interview and questionnaires to provide an overall understanding of responses to similar questions. Each section addresses key areas that link back to the research questions. The section begins by outlining Executive Director and employee understanding of Servant Leadership and Choice Theory from both a theoretical and practical perspective. An overview is then given of what the Executive Director and employees see as the role of the shelter worker and the shelter environment within a Servant Leadership/Choice Theory approach to client service. A section pertaining to the effectiveness of CMHA, Kamloops Branch's approach to client service is also included. The final section focuses on findings of how CMHA, Kamloops Branch shelter employees learn best and what training may effectively inform the Servant Leadership/Choice Theory client service model.

5.1 Servant Leadership and Choice Theory: Definitions and Descriptions

5.1.1 Servant Leadership

For an agency definition, the Executive Director described Servant Leadership as using all the skills of leadership within a followership approach that supports clients’ rights and needs, and provides capacity for clients to make decisions about their own lives:

"They don't have power even over their own impulses and controls; they have not accepted a lot of responsibility for their own lives and they've handed their power over to a lot of authorities and a lot of programs and services and they've traded their dignity for basic needs" (D. Sage, personal interview, February 7, 2013).

The key focus in the Executive Director's response was to hand power and responsibility back to clients with factors such as agency appearance and funder requirements being secondary to providing opportunities for client growth.

When asked to specifically identify CMHA's leadership approach, five of 17 respondents for a total of 29% were able to correctly name the approach as Servant Leadership. Emerald Centre staff were also inconsistent in describing a Servant Leadership approach. Nine of the 15 respondents alluded to the idea that clients were in charge of their successes or failures and that staff were only there to support and guide clients, with 3 respondents outright describing this idea. One respondent was able to state, "servant leadership gives our clients the ability to be in control of there (sic) own outcomes. While..."
we as front-line workers are there to support, we are not responsible for their failures or achievements". Over 10 different themes were described by staff.

5.1.2 Choice Theory

While direct data on a definition of Choice Theory was limited due to employees never knowing the needs categories by that name, one question that asked about the agency’s overall approach to client service demonstrated that 10 of the 17 respondents mentioned a key component of the approach was meeting client needs. Although no respondent specifically called it Choice Theory, 58% of respondents directly linked CMHA’s client service approach to client need.

5.2 Servant Leadership Competencies

5.2.1 Servant Leadership Competency Identification and Description

Interview and questionnaire participants were asked to both outline and explain key competencies of Servant Leadership. In his interview, the Executive Director described two competencies:

- a strong, healthy ego capable of not personalizing others’ behaviour
- internal motivation that is not easily influenced by external factors such as promotions, money, and recognition

For questionnaire participants, a total of 34 different characteristics and themes were provided by 12 respondents. The following themes were the most prevalent:

- Listening/Communication (8 respondents; 67%)
- Empathy (5 respondents; 33.3%)
- Non-judgmental approach and attitude (5 respondents; 33.3%)
- Putting the client first (4 respondents; 20%)

Many respondents touched on other Servant Leadership characteristics identified in the literature such as persuasion, foresight, compassionate collaborator, awareness, and healing, with each identified by one or two participants. Responses also alluded to Servant Leadership encompassing both behaviour and attitude. For example, behavioural characteristics included persuasion, kindness, staying calm, humour, and communication while attitudinal characteristics comprised such things as stewardship, valuing individuality, open-mindedness, and compassion.
There was little consensus among respondents on what encompasses key characteristics of Servant Leadership and some characteristics were similar in description but named differently. Respondents who did name the same characteristic often described their significance to Servant Leadership and client service differently. For example, when describing empathy, one respondent stressed that showing empathy helps the residents feel accepted thus focusing perspective on the client, while another participant argued that “in order to support and guide people with understanding, you must be able to empathize with their circumstances”, thereby focusing perspective on staff as a starting point. When asked why they chose the characteristics they did, the majority of responses surrounded the idea of working effectively with clients in a helping, caring manner.

5.2.2 Key Servant Leadership Characteristics: Effective and Ineffective Use

The researcher asked all participants to provide effective and ineffective examples of four specific servant leadership categories as outlined within the literature and in alignment with Greenleaf’s work and initial conversations with the Executive Director. The four categories included: listening; empathy; putting client needs first; and excellent commitment to the growth of a client.

When considering the question of effective listening, questionnaire respondents spoke of specific staff behaviours including maintaining eye contact, asking questions, and not interrupting. Respondents also described assessing client body language, allowing clients to speak as well as talking through issues with clients, and paraphrasing. These themes were present through the majority of the responses, with positive outcomes described as clients actively seeking out staff and moving forward in their goals. The Executive Director stated that, "effective listening means not only have you heard the words but the spirit of the need that underlines it. And sometimes if you are listening well enough, sometimes you hear things that the speaker doesn’t even know they've told you" (D. Sage, personal communication, February 17, 2013).

Staff examples for poor listening with a client outlined verbal and non-verbal themes. Verbal themes included interrupting, poor use of language, not acknowledging clients as they spoke and arguing with clients. Non-verbal themes such as shutting clients out of a space; not acknowledging a client’s word and lacking eye contact when clients were speaking were also discussed. The Executive Director described poor listening skills as “interrupting, jumping to conclusions, solving problems for people instead of letting them think on it and deal with it a bit themselves”(D. Sage, personal communication, February 17, 2013). When considering outcomes, respondents linked these behaviours to clients not returning to the shelter; anger; clients complaining to management; demoralization; and breakdowns in overall staff/client interactions.
For the use of effective empathy, providing options and solutions to client difficulties was identified in just under half of the 11 employee responses. Moreover, 8 responses discussed staff working within the grey area of shelter expectations and guidelines to find client-focused solutions that may not normally be considered. Other examples included providing food to someone not staying at the shelter and providing rest for a client outside typical sleeping hours. Using non-verbal behaviour to exhibit care and concern was found within eight responses. Outcomes included clients attaining permanent housing; clients accessing the shelter more regularly when needed; clients maintaining their dignity; and clients feeling cared for.

The Executive Director did not describe effective empathy. Instead, he focused on the separation of empathy from sympathy. He stated it was important that staff understand “what's at stake for people and understand what it means to them, to have or to not have what it is they are losing or gaining” (D. Sage, personal communication, February 17, 2013). He commented that sympathy is dangerous because one is “basically acting as someone who is underwriting bad behaviour and choices and saying I will rescue you from yourself. For me, that would be, for me, a dangerous kind of empathy.”

Key themes for staff surrounding the poor use of empathy included a lack of compassion from staff; black and white thinking that did not account for client diversity; inadequate skills to assess and help complex clients; and the use of abusive behaviours toward clients. One respondent outlined,

“client was having chest pains and having a hard time breathing. Client had recently come from the hospital and was resting on his bed when symptoms began. I was coming from the laundry room when he called me to come. I took his hand and helped him to the office. Called paramedics. Shift change was in perssession [sic]. Poor Empathy: one of the staff memebers [sic] yelled out, 'go have another cigarette old man, Fuck!’”

The key outcome for staff lack of empathy was identified as clients being denied access to the shelter.

The characteristic of putting client needs first was also included. Within the questionnaire responses, using one’s own time such as break time to ensure client needs were met was evident, as was prioritizing client needs over what were deemed menial tasks such as paperwork.

The Executive Director, in his assessment, specified instances in which staff “put up with behaviour that is not easy to tolerate; they put up with personal insults; they put up with
some scary kinds of things because it’s in the clients’ best interest to do those things” (D. Sage, personal communication, February 17, 2013). Outcomes were described as clients feeling supportive and peace and stability within the shelter environment.

When considering examples of staff putting their own needs above client needs, employee respondents included examples such as refusing or delaying service to a client; inappropriate self-disclosure; staff hiding behaviours from management; and communication that was harsh and disrespectful. From an agency perspective, the Executive Director identified staff doing things out of convenience, and making judgment calls that are easy and that feel good instead of what may be in the best overall interest of the client. As with other examples of poorly meeting client needs, outcomes centred on clients feeling upset or angry; clients’ basic needs being ignored; and clients not having access to the shelter.

The last Servant Leadership characteristic that was considered was a commitment to the growth of a client. Examples for excellence in this characteristic included providing agency and organizational connections that benefitted clients; participating in verbal and non-verbal behaviour that was welcoming and healing; allowing clients to return to the shelter despite previous behaviour; and ongoing support for repeat clients. A key theme of not giving up on clients was evident: “the worker was working with a client for over a year to get the clients PWD application completed and to get client connected to secure housing and other supports...The worker continued to work baby steps with the client together they set goals and outcomes which the client was able to complete, after time the goals got bigger and more significant...”.

The Executive Director argued for the importance of staff following through on consequences. “When a client knows what those consequences are rather than [staff] rescuing the client, they follow through on them....I think it’s good when clients make a judgment, even a harsh judgment on themselves and staff don’t rescue them from that; that they instead say ‘what would you like to do about it” instead of “well, that’s not true” (D. Sage, personal communication, February 17, 2013). Outcomes included increased access to services and supports, attaining housing, and greater self-confidence and autonomy.

Poor commitment to growth was also considered, with respondents stating examples of disrespect for client complexities such as mental illness and addictive behaviour; using negative judgmental commentary and behaviours toward clients; and infantilizing clients by doing tasks for them. From a CMHA, Kamloops Branch perspective, poor commitment
to growth included staff attempting to rescue clients from their feelings and difficulties which is seen as a key piece of their motivation. When considering outcomes, participants stated themes surrounding clients feeling left out; breakdowns in client/staff relationships; client disempowerment; and a sense of helplessness.

5.3 Choice Theory Needs Categories

5.3.1 Needs Category Identification and Description

Emerald Centre respondents were also asked to identify and describe Choice Theory's four specific psychological needs and describe each one. Eleven employee respondents attempted to identify the four needs categories with varying levels of accuracy:

- Love and Belonging (5; 45%)
- Fun (4; 37%)
- Freedom (3; 27%)
- Power (2; 18%)

One respondent was able to both identify all four needs categories and provide descriptions that are in alignment with Glasser's descriptions. A second respondent identified and described belonging, fun and freedom and identified the fourth category as empowerment or "to be given the strength to take over one's own life". A total of 17 different needs categories were provided. Of the 11 respondents, 9 outlined the needs categories from the perspective of how the shelter could meet those needs in clients while two, those that correctly identified 3 and 4 needs categories, spoke from the client's position. The Executive Director was also asked to describe the four needs categories. He was able to identify and align his descriptions with the literature although his definitions were minimal.

5.3.2 Four Needs Categories: Effective and Ineffective Examples of Meeting Client Needs

As with the Servant Leadership characteristics, respondents were asked to identify examples of effective and ineffective examples of the four needs categories outlined by Glasser. When describing examples of effectively meeting a client’s need for love and belonging, questionnaire participants focused on playing games; using verbal and non-verbal communication to demonstrate caring, compassion and acceptance; and an overall non-judgmental attitude. From the Executive Director's perspective, effectively meeting a client’s need for love and belonging encompassed non-verbal communication such as eye contact, tone of voice and behavioural signals over verbal communication that exemplifies caring. Staff believed outcomes included acceptance and feeling a sense of
belonging and connectedness as well as an overall positive shelter atmosphere and client mood.

Poorly meeting a client’s need for love and belonging provided numerous insights. Questionnaire participants spoke of a general theme of shaming and blaming behaviour. Participants identified examples that typified humiliating clients, often in front of others; staff members placing blame on a client; and the use of rude, judgmental language. An intentional lack of time for clients was another key theme. The Executive Director spoke about the direct link between staff telling clients they care and giving them praise and the outcomes of client demoralization and pushing them away. Client outcomes were identified as anger, leaving the shelter to sleep outside, clients considering themselves burdens and spending a great deal of time alone.

When respondents were asked for examples of effectively meeting a client’s need for power, questionnaire participants spoke about staff providing the capacity for clients to make decisions and accept difficult consequences such as smoking after curfew and losing their shelter bed for the next night. Providing information as well as empowering clients through knowledge and community connections were also outlined by two respondents. The Executive Director commented that recognition and allowing clients to be in a teaching role provides the impetus for empowerment from a managerial perspective. Respondents linked these examples to clients feeling empowered and in charge of their own lives. One respondent commented, “the client was made aware of an action and a consequence, and then allowed to make a choice”.

In terms of poorly meeting a client’s need for power, examples were linked to staff’s need to exert their own power and decision-making over client’s wishes and choices. Another theme mentioned within four responses was staff unwillingness to hear what the client needs or wants. Impeding a client from speaking with management was also outlined as was an example in which staff did not intervene when a client was breaking a rule that exploited a more vulnerable client. The Executive Director added criticism, insults, and ordering to the examples. Outcomes were described as client disempowerment; infantilizing clients; and clients losing their rights within the shelter setting.

Two themes surfaced when respondents were asked to describe examples of effectively meeting a client’s need for freedom: allowing clients to leave the shelter on their own terms; and providing resources and knowledge to support client needs. One respondent outlined an example of both themes: “a client wanting to leave the hostel at 1:30 am. The worker went over the guidelines with the client about leaving at such a time and also
went over the time such a client may be allowed back. The staff member offered to call an ambulance. The client left and he returned the following day at 15:00 hrs.” The Executive Director stated that providing options was key. All eight employee responses spoke of outcomes in which clients felt supported in their decisions; the capacity for clients to return to the shelter and often staying longer than previous stays; and clients’ interpersonal and physical needs being met.

Responses to the question about poorly meeting a client’s need for freedom were limited, with three of the seven respondents providing no example. The main theme within the four responses was staff taking away clients’ right to options for meeting their own needs, often within abusive or boundary breaking behaviour. One example of this was: “a) the client wanted to have a cigarette but it was after 2300 hrs. b) as the client was going to go out into the smoking area, the worker grabbed at the client to stop her. The client yelled at the worker to not touch her and went out into the smoking area. When she came into the common area, the worker said that she will be asked to leave for not following house guidelines. By trying to physically restrain the client, the worker poorly met her need for freedom.” The Executive Director put forth the same theme, stating those who told clients what and when to do things without providing options were lacking in this capacity. General outcome themes included anger, disempowerment, and immediate consequences for clients despite staff having the capacity to postpone consequences to ensure client safety.

Eight questionnaire participants responded to the question of effectively meeting a client’s need for fun, although one respondent did not fully answer the question. Providing opportunities for clients to participate in activities such as cards, music, colouring, singing and watching television was key. One respondent also spoke about providing shelter clients with knowledge about other fun community events and another spoke about attempting to make the intake process, normally difficult for clients, light and friendly. The Executive Director felt that providing an environment in which clients are able to laugh, participate in enjoyable activities and have the opportunity to express the good times in their lives is essential. Permission to laugh at staff was also described by the Executive Director as a clear indicator of meeting this need. “It has been my experience that clients like to see us fail at things and so when a staff member trips over the mop bucket and laughs at it themselves, inviting the rest of the world to laugh along with them...these are moments of gold” (D. Sage, personal communication, February 17, 2013). Outcomes were described as clients feeling calm, happy, and content within a more relaxed, fun environment.
When asked about examples of poorly meeting a client’s need for fun, responses were limited, with two of five respondents stating they did not know and another respondent providing an example that was difficult to use within the context of the question. The two responses that were assessed argued that lack of interaction between staff and clients as well as staff mood and overall approach to clients impeded clients’ need for fun. The Executive Director commented that certain forms of humor can be demeaning and negative, taking away from meeting clients’ need for fun. Rigidity and put downs also stifle client capacity for fun. Overall outcomes, other than fun not being possible, were not delineated.

5.4 Shelter Work and Shelter Environment

5.4.1 Shelter Tasks

Research participants were asked to discuss the specific tasks of a shelter worker as they related to meeting client needs. Questionnaire results showed little congruence amongst staff, with 25 different tasks or task orientations being provided within 9 responses. There were however some overall themes within the responses:

- communication that encompassed empathy, engagement and listening
- support through advocacy, encouragement, helping clients access resources, and allowing clients to determine their own goals
- an attitude of non-judgment, open-mindedness, trust and relationship building
- fulfillment of tangible tasks such as cleaning, explaining guidelines and expectations, and being careful with client belongings

The Executive Director stated the role of the shelter worker is to serve and meet client needs. He spoke directly of tangible tasks such as cleaning and serving meals, as well as creating a warm, inviting atmosphere.

5.4.2 Shelter Environment

Respondents were also asked to discuss how the shelter environment contributed to meeting client needs. Eight respondents provided various examples such as privacy and confidentiality; structure and routine within the shelter; books and games for fun; the capacity for social interaction; and readily available staff. Participants also signified the environment's capacity to allow clients to focus on themselves and their priorities.

The most prevalent theme was safety. For example, one of the six respondents commented, "the environment was designed with safety as a first priority". Safety was deemed as essential to allowing staff and clients to focus on client needs. There was
evidence that participants were discussing two forms of safety: tangible safety measures and the perception of safety. For example, one respondent spoke about locking up laundry and other items up while another spoke about the use of an intake area to conduct the initial intake so as to ensure the client "some alone time with a staff member before entering into a public atmosphere". Another respondent discussed providing a space where clients are able to feel safe to talk about their needs and wants and yet another talked about space being well laid out and well lit. The Executive Director also prioritized safety, stating "we're concerned with the safety of the population within the building and so even if we're subjecting a newly arrived client to things that seem uncomfortable, they very quickly understand that this isn't personal; it happens to everyone..." (D. Sage, personal communication, February 17, 2013). The Executive Director also linked the environment design to meeting both relationship and empowerment needs but within a safety perspective.

5.4.3 Shelter Worker Role

Participants were asked to describe their overall role as a shelter worker. The importance of providing safety was evident with four of nine respondents directly speaking of safety and 3 respondents implying their role in creating safety. Five respondents directly linked their role to meeting basic client needs such as food and clothing. Providing support and advocacy as well as connecting clients to the community were also themes within eight of nine responses. In his response, the Executive Director spoke about meeting client needs and argued for both practical and attitudinal components. For example, the Executive Director commented that having clean bathrooms and meals served respectfully and properly were important, as was creating "an atmosphere and environment where people feel that it's warm and inviting and it's fun..." (D. Sage, personal communication, February 17, 2013).

Both the Executive Director and employee participants were vague in linking the four needs categories or servant leadership characteristics to their answers. Two staff participants did identify creating a fun atmosphere in their response and three respondents suggested a form of love and belonging but power and freedom were lacking in responses. One employee included three of the four needs within the response. In terms of Servant Leadership characteristics, one respondent mentioned listening as part of their role; no other characteristics were found in responses. There was also little congruence in the answers respondents provided in terms of Servant Leadership characteristics and their role as a shelter worker.
5.5 Client Service

Research participants were asked numerous questions pertaining to the effectiveness of CHMA, Kamloops Branch's approach to client service. When asked about its general effectiveness level seven of eight respondents considered it to be moderately effective to effective. One stated that the approach to client service is constantly changing, thereby creating confusion for both the employees and the residents. Seven of eight respondents also cited the approach as effective for the specific clientele the shelter works with.

Level of effectiveness was linked to numerous factors. For some, policies, procedures and guidelines as well as the shelter environment were main factors in the model's success. For others, the built-in grey area within the policies, procedures and guidelines was the main impediment to the client service model. Employee skill set and effective use of specific competencies such as listening, empathy, and commitment to growth of a client, as well as providing love and belonging, power, and fun were seen as contributing factors for effectiveness. Others however felt that some employees were in the job for the wrong reasons, diminishing overall effectiveness due to lack of investment.

Level and style of management support was seen as both an asset and a hindrance, with some respondents seeing management as hands on and approachable and others identifying an ongoing lack of direction from management, particularly for new and struggling staff. One respondent also argued that there was often a lack of consequences for both clients and staff which impeded the overall program. One respondent did point out that "clients who are hard to house or who have multiple barriers/concurrent disorders sometimes do not do well here. I feel that sometimes those clients are harmed more than helped." The majority of employee responses however argued that the continual focus on client needs simplifies the approach.

Management stated it is a difficult client service approach to implement. The Executive Director commented that continued responsibility for one's behaviour and willingness as well as maintaining internal drive and accountability when no one is looking can get in the way of implementing the approach. Understanding and implementation on any given day may be incongruent.

Respondents were also asked about what could be changed about the approach. One main pattern arose amongst employee respondents: the need for greater consistency and the role management must play in this. A lack of supervisory direction and support for staff, and in particular those that are new and struggling, was outlined. Both consistency and supervision were focused on, with the two entwined in the responses. When considering areas that need to be worked on, staff explored themes of boundary setting,
consequences, flexibility and greater consistency in procedures and protocols to better implement the client service model.

5.6 Staff Learning

Employee respondents were asked questions directly related to individual learning as a means to assess CMHA, Kamloops Branch’s current training and to inform a training program that considers both agency and employee context and need. When identifying learning styles, visual and hands-on learning were the two most popular responses. Other learning styles were verbal instruction as well as the capacity to ask questions and talking about new learning.

Staff were also asked to rank 12 learning options to determine what training mechanisms may best inform CMHA, Kamloops Branch’s training plan. Five training options were prioritized in responses (in order of most significant):

- experience with clients
- staff meetings
- role modeling
- time with co-workers
- time with management

Some of the answers directly related back to how the individual learns best. As one respondent stated, "as I am a visual learner. I would rather watch and do. When it comes to reading and retaining information I find that it does not stick with me as well." Others focused on what outlets had been most useful to date.

The learning options receiving the least amount of support including training manuals as well as performance reviews and informal feedback, both of which were linked to a lack of trust for management:

- “I find informal feedback least effective. I never know if my managers are holding something back or not.”
- “learning with my peers in a hands on training is best for me because sometimes during my informal feedback and performance reviews or time with management I may feel judged or not able to process what is said as easily.”

5.7 Staff Training

Questions directly linked to employee training were also included to assess current training practices and determine a path moving forward.
CMHA’s approach to staff training is described by the Executive Director as a somewhat ad hoc process. The initial orientation session is considered to be a crucial piece of training for numerous reasons:

"The orientation process happens...with me discussing the philosophy, the beliefs, the intention, to help people get some sort of sense before they walk into the environment of the framework so that they have something to hang their information on. They will form impressions and they will get ideas from the shelter that might not be accurate unless they know the foundation or the basis that those things are done on" (D. Sage, personal communication, February 17, 2013).

When employees were asked about what material was covered within their initial orientation, 12 topics were provided within the responses. No respondent specified Servant Leadership or leadership in general as being part of their employee orientation session, nor did employees describe the four needs categories, although meeting client needs and a client-oriented approach were key themes. Client safety was also prevalent as a theme.

Within this unstructured training approach, CMHA management identified role modeling and observation, storytelling and metaphor as key means to train staff. The Executive Director also commented that management needs to provide clarity in service when staff are struggling but must also allow staff to struggle through situations so as to better learn how to take information and integrate it into the client service model. Experiential training was considered an essential practice for effectively learning CMHA, Kamloops Branch’s approach.

One-to-one staff pairing was also considered a key training practice and in particular, ensuring a staff member trains with numerous staff to attain a sense of different styles and approaches. The Executive Director contends that working with numerous staff exposes one to differing styles, thereby allowing new skills and ideas to be picked up. It was also identified as key to learning how to respect, appreciate and celebrate difference. Training with numerous staff members was identified by some employee respondents as a hindrance to adequate learning. One respondent stated that there should be designated training staff.

The Executive Director stated that allowing staff to learn on the job and make mistakes without fear of reprisal and punishment was essential. This was seen by some staff as problematic though, as it was argued that there are few consequences for unacceptable
employee behaviour. Time with management and staff meetings were not discussed by the Executive Director.

Shelter employees consistently ranked their training level at average or below, as did the Executive Director who cited money and resources as the two greatest impediments to adequate training. Despite unstructured training, many respondents felt supported by management's leadership and what was described as an accessible, supportive, understanding approach to the shelter and employees. One respondent commented that CMHA was, "very supportive, always have their door open for clients and staff, very knowledgeable about technique and procedures. Great teachers! Committed 200% to E. Centre, they put in many overtime hours." One respondent stated throughout the questionnaire that there was no training program, and did not consider any practices of the current training approach to be formal training.

When considering a more structured program, employees wanted numerous components as outlined in the following list:

- Performance reviews
- Staff meetings with specific training
- Individualized training/specific courses
- Group exercises
- Reflective practice
- Increased supervision
- Staff training checklists
- Presentations

The Executive Director commented against a one size fits all training program, stating that individual factors such as experience, knowledge, and personality need to be considered if the agency is going to be capable of taking training from a knowledge to behavioural level that can meet the diverse, complex needs of their clientele. As he outlines, “a one size fits all training program only feels good to management. It’s something we get to check off in a box; yeah, we’ve provided this type of training. It doesn’t mean anything if it hasn’t sunk in at a behavioural level of the staff member and therein lies the problem” (D. Sage, personal communication, February 17, 2013).

Training alone was not considered to be enough. One respondent stated that training is but one piece; that personality needed to be considered as not everyone is appropriate for this type of work. Other staff suggested that some staff lacked the proper motivation and staff inability to set their own needs aside within the shelter environment. The
Executive Director argued that personal suitability needs to be assessed within the probation period as certain values and beliefs are likely not teachable.

The Executive Director put forth the point that some staff also need to learn how to better identify how their own needs and comfort level interact with their capacity to provide effective client service. As with clients, employee's personal need for love and belonging, fun, freedom and power as well as overall financial stability weigh in on their decision-making. He argues for staff taking their training one step further than the shelter and implementing it into every realm of their lives. This he sees as providing the foundation upon which staff can effectively navigate both their own needs and the needs of the clients they serve.

“They need to be able to say, ‘I’m meeting three of my four needs quite effectively and responsibly but you know what, my power is way out of line and because of that, I’m likely to order clients around or I’m likely to act out in that fashion at work because that need is not in check or I don’t have the tools available to effectively meet those needs so I will try to meet those needs in ineffective ways that are not gonna be good for the client group’” (D. Sage, personal communication, February 17, 2013).
6.0 ANALYSIS AND DISCUSSION

The purpose of this section is to review the findings from the interview and online questionnaires, discuss their linkages and gaps to the literature and to the agency perspective as well as outline some key lessons that need to be considered when identifying recommendations. This section provides an overview of the key findings surrounding Servant Leadership and Choice Theory as they directly link to the deliverables of defining and describing the theories and their role within CMHA, Kamloops Branch’s client service model. A discussion on respondents' understanding of the shelter worker role and tasks as well as the shelter environment within this model is also provided as is a brief discussion of management’s role in heightening capacity for the model. Analysis of staff training and learning that can help inform a training plan moving forward is also included. Another section discusses the perception of this model for effective client service. Lastly, a synopsis of the key findings will be provided.

6.1 Servant Leadership and Choice Theory Approach: Discussion of Key Findings

6.1.1 Servant Leadership

There is some incongruence between the literature, Executive Director and employee understanding of both Servant Leadership and Choice Theory. When considering Servant Leadership, the literature review suggests widespread acceptance of Greenleaf’s (1977) definition that Servant Leadership is defined by meeting others’ highest priority needs through a Followership approach that promotes autonomy and freedom. The Executive Director, albeit somewhat unclear in his definition during the interview, does link his definition to Greenleaf’s work and in particular the notion of Followership that supports client’s rights and needs and provides opportunity for empowerment. Employee capacity to both name the leadership approach and specifically define it within either the literature or agency context is lacking as a whole, although some staff were able to somewhat describe the approach and demonstrate a focus on clients and client needs within a Followership approach. This implies at least an inherent understanding of a Followership approach within the organization. What tends to be lacking however is a clear and consistent capacity to specifically define and describe Servant Leadership as a theory and within an organizational context that links the idea of Followership to CMHA, Kamloops Branch’s overall client service model. Furthermore, the importance of putting aside one’s own needs, something Greenleaf stressed as essential to Servant Leadership, was missing from responses, demonstrating a key component of the Followership model is not being recognized.
Identifying characteristics that are considered in the literature to be within the Servant Leadership spectrum was also difficult for employees but the findings show employees were more capable than the Executive Director to align their responses to characteristics noted in the literature. While the Executive Director’s response to identifying characteristics provided two examples that do not wholly fit with the literature, three of staff’s top four ranked characteristics (listening, empathy, putting clients first) are considered by many researchers to be essential to Servant Leadership (e.g., Greenleaf, 1977; Buckhardt & Spears, 2004; Spears & Lawrence, 2004). The role of listening, in particular, was recognized by most employee respondents as a necessity to meeting client need, something CMHA, Kamloops Branch can likely build on within their client service model. Staff were also more dynamic than the Executive Director in providing Servant Leadership characteristics as a whole. What is unclear however is what role CMHA, Kamloops Branch has played in employee inclusion of these characteristics. Moving forward, greater assessment of their potential use in the agency’s client service model may be fruitful.

Within the context of the findings, some employees showed more capacity to state various Servant Leadership characteristics than the Executive Director, although the Executive Director may have provided more examples if given the opportunity to do so. Employees however did not describe them consistently or directly link them to the client service model. The low percentage of respondents that named key Servant Leadership characteristics and the fact that 34 different characteristics were identified by employees however suggests little overall congruence between the literature, the Executive Director and the employees. Employees however were clear in the linkage between their choice of characteristics and working effectively with clients in a helping, caring manner, thereby showing a clear focus on client needs or the Choice Theory component of CMHA’s model.

Descriptions for what each Servant Leadership characteristic encompasses behaviourally and attitudinally and how these link to specific outcomes were diverse amongst staff and the Executive Director. There was little consistency in describing Servant Leadership characteristics or in the responses specifically asking respondents to describe the four characteristics of listening, empathy, commitment to the growth of people and putting client needs first. However, the descriptions and examples of the characteristics provided by employees tended to be realistic within the parameters of each characteristic as outlined in empirically-based research and within an organizational context, showing some understanding of each characteristic.

The findings also demonstrate a pattern of what Servant Leadership characteristics are best understood within a Servant Leadership approach to client service. In alignment
with the capacity to name characteristics, listening is the most understood and well explained in relation to effective and ineffective use of the characteristic within a client service model, both by employees and the Executive Director. How to effectively use empathy is the least understood by employees and the least well defined by the Executive Director, suggesting the need for greater clarification for what empathy looks like within the agency’s client service model. The research also demonstrates that staff and the Executive Director do know how to prioritize client needs over their own and when they are helping or hindering client growth.

A significant finding is the depth of contextualizing Servant Leadership characteristics found in the Executive Director’s responses when compared to employee responses. While staff tended to provide descriptions of verbal and non-verbal behaviour that could easily be measured or seen, such as providing eye contact or providing a client something to eat, the Executive Director’s responses often spoke about internalized understanding or behaviour that went beyond what could be described as surface behaviours. This was evident in his discussion of listening requiring an analysis of meaning, something employees tended to miss, but which links directly back to Greenleaf’s assertion that without a clear understanding of the meaning behind words, effective listening within a Followership model cannot occur. He also spoke of empathy requiring an understanding of what is at stake for people who accessed the shelter system, which again staff as a whole did not pick up on. The Executive Director tended to stress a non-verbal, action-centred focus that was often lost on staff. The Executive Director is thus attempting to take characteristics beyond mere behaviours toward a more intrinsic, internalized understanding that may better inform client service.

As a whole, employees can at least minimally describe verbal and non-verbal behaviours connected with each characteristic and provide overall outcomes linked to a characteristic. Employees as well as the Executive Director tend to understand the linkages between specific behaviors and the impact it has on clients, both positively and negatively. The majority of positive outcomes show that employees and the Executive Director see a clear linkage between effective use of Servant Leadership characteristics and client safety; emotional well-being; overall client support; and facilitating clients moving forward in their goals. This same pattern is true for negative outcomes in that employees and the Executive Director link ineffective use of Servant Leadership characteristics to client emotional instability; abusive behaviour; lack of shelter access; and overall client disempowerment. Thus, staff and the Executive Director are aware that certain employees’ behaviours may put clients at risk of harm and as a whole, staff understand the impact specific behaviours have on clients and their success outcomes. The responses also suggest that there is an appropriate understanding of the diversity
required to meet vastly different client needs and outcomes but also a demonstration of varying experiences employees have had within the shelter setting as the questions asked respondents to link their responses to actual experiences. What is not clear is the level of understanding that staff have on how this links to CMHA, Kamloops Branch’s Servant Leadership/Choice Theory model of client service. Employees’ capacity to link examples with realistic outcomes suggests the next step is delineating and defining each Servant Leadership competency.

6.1.2 Choice Theory

One finding within the research is that CMHA, Kamloops Branch has not specifically named Choice Theory, in and of itself, within its training including the orientation session. The research suggests that employees keep the idea of client needs at the forefront of the work they do yet they lack a real framework for the specific needs categories to inform their work with clients. This was shown when assessing staff and the Executive Director’s capacity to identify the four needs categories. Although the Executive Director easily articulates the four needs categories and relevant examples for each need category, employees demonstrated some clear deficits in this area. Employees as a whole showed little capacity to identify the four needs categories, as confirmed by less than 50 percent of respondents being able to correctly name each needs categories and a total of 17 different needs categories being identified. While love and belonging is identified slightly more than the other three categories, it is evident that without prompting, most employees struggle to name Choice Theory’s four psychological needs categories.

The finding that a few staff are able to identify and describe at least three of the four needs categories within a perspective that aligns with CMHA, Kamloops Branch’s approach is however important. It shows that CMHA, Kamloops Branch is arguably providing some exposure to the four needs categories as it is unlikely that staff’s congruence to Glasser’s four needs categories is coincidental. It also potentially validates its use as a model for meeting client need, given the success outcomes that both the Executive Director and employees linked to effectively meeting client’s needs within the four categories. The tendency for employees to assess the needs categories from a shelter perspective may need to be considered in how CMHA, Kamloops Branch approaches training its model and whether this perspective is an ideal starting point. And while not common, linkages between the needs categories, key shelter tasks and client needs are being made, at least minimally by some employees, arguing for some potential leverage points for effectively using the four needs categories within the shelter system. But as with Servant Leadership, what tends to be lacking is a consistent capacity to
specifically define and describe the four needs categories within an organizational context thus arguing for greater overall clarity in describing and delineating the categories.

Although employee respondents tended to put forth realistic linkages between staff behaviour and attitude and meeting client needs, employees were often inconsistent on what it means to meet a specific need and in particular, the need for freedom versus the need for power, as many responses could be seen as interchangeable for the other category. Considering Glasser’s (1998; 1984) lack of clarity and delineation between power and freedom, it is not surprising that many of the responses suggest a lack of delineation between them as well. Staff’s lack of insight into how to meet a client’s need for fun is also significant, given Glasser’s contention that learning happens most easily when fun is involved. Although staff tend to understand how to create some level of fun, no clear understanding of how staff impede client fun may be a hindrance to excellent client service. As a whole, employees were less able or perhaps unwilling to provide examples for ineffectively meeting a client's needs, possibly as a result of the researcher's authority position within the agency.

But as with the Servant Leadership competencies, employees do understand there is a relationship between their approach to meeting client need and client outcomes, even if they cannot articulate the framework. Most employees' examples about appropriately meeting clients’ needs within the four needs categories demonstrated outcomes that potentially heighten individual internal control and empowerment. Staff recognized that effectively meeting a client’s needs provided the impetus for success outcomes such as client emotional well-being, access to services, and client empowerment. The impact of ineffectively meeting client needs was understood as resulting in client disempowerment and emotional instability as well as diminishing access to shelter services as a whole.

The examples also suggested employees' own need for power often gets in the way of effectively meeting client needs as examples were linked to staff power exertion through abusive behaviour, shaming, blaming, and controlling behaviour. Those who appeared to understand how to meet a client's need for freedom also understood the importance of allowing clients to make their own decisions, even if the employee saw the choice as being harmful to the client. It is thus arguable that ineffectively meeting client needs is at least partially attributable to a conflict between staff and client needs. The findings together suggest, as reinforced by the literature on Choice Theory, that the relational component between an employee and a client has a consequence on effectively meeting client needs and impending success outcomes. This implies the need for CMHA, Kamloops Branch to consider the possibility of designing training that not only helps employees
better understand the needs categories but also the role their own needs play in enhancing or hindering client service.

6.2 Shelter Worker Role, Tasks and Shelter Environment: Linkages to Client Service

As with most of the research findings, employee respondents were inconsistent when naming the key tasks and role within the shelter, although a few themes were present including communication; general support and advocacy; a client-focused attitude; client need fulfilment; and tangible task fulfillment. The inconsistency in naming tasks and roles shows the complexity of the shelter worker role as well as the possibility that employees do not have a clear picture for what their role is, although the themes suggest employees at least have a rudimentary understanding of it. The most prevalent theme found in both the Executive Director's and employees' responses was the link between the shelter worker role and environment and safety, both real and perceived, to facilitating client needs to be met and success outcomes to be possible. In particular, there was a belief that creating a positive, safe environment provided the conditions for clients to focus on themselves and their priorities. However, this theme was on an abstract level, with very few respondents including the Executive Director, directly linking safety to the four needs categories or the Servant Leadership competencies. But the theme of safety is one that CMHA, Kamloops Branch can likely build on within their client service model as there is an understanding of the importance of attitude and behaviours to safety and meeting client needs as a whole. What needs to be made clearer is direct linkages that can formalize these ideas into training and provide employees greater insight into how to more effectively use their role and tasks within the shelter environment to meet the four client needs within a success outcome perspective.

6.3 Servant Leadership, Choice Theory and Shelter: Linkages in the Findings

A key positive finding was the behavioural foundation that at least partially exists within both employees and the Executive Director for the client service model. Although the Executive Director did not provide a comprehensive list of Servant Leadership characteristics and staff had difficulty consistently identifying both the Servant Leadership characteristics and needs categories, when prompted, all respondents were able to somewhat describe the needs categories and Servant Leadership characteristics and their connection to the shelter system and its clients.

Moreover, there tended to be overall congruence in what outcomes arose from either effective or ineffective behaviour within the characteristics and categories, thereby demonstrating that employees are aware of the impact their behaviour and choices has
on meeting client need. Staff and management are therefore at least somewhat behaviourally competent despite deficits in verbalizing the approach.

When describing day-to-day tasks, all respondents outlined, to some degree, the linkage between client needs, the environment and the specific tasks they do within the shelter. Yet a direct link to Servant Leadership characteristics and the four needs categories was missing. Many responses provided examples within parameters that fit the needs categories and Servant Leadership characteristics but there was a disconnect between what staff do and how it is directly aligned to the model. Evidence suggests that workers have an understanding of important tasks within their role as a shelter worker without having a clear picture of how this links back to CMHA, Kamloops Branch’s client service model. The findings imply a need for a formalized training model that bridges the gap between the theoretical and behavioural approaches. This is essential to grounding employees' behaviour and facilitating their capacity to make informed decisions within their client service practice.

6.4 Management’s role

Although the research showed that some employees are content with the form and level of management involvement in the shelter, a pattern emerged that management involvement needs to be increased. Findings show staff see a correlation between lack of direct supervision and inappropriate staff behaviour that is harmful to clients. The deficit in consistency from management was another theme although the Executive Director and some employees contended this was a necessity to be successful within the model. It was evident however that in moving forward, management needs to assess its approach to both employee training and overall supervision, and in particular, its current evaluation methods for staff’s ability to implement this approach. The distrust some employees have for informal feedback from management also implies a need for management to rethink its approach and perhaps work to implement a more effective Servant Leadership culture, as suggested within the literature. The Executive Director acknowledged a lack of money and resources as an impediment to greater management involvement; however, given the potential consequences that stem from management’s inconsistency and hands-off approach, CMHA, Kamloops Branch may need to find innovative ways to increase funds and time for management resources.

6.5 Staff Training and Learning

One key theme surfaced around the issue of staff training: it needs to be heightened. All respondents put forth the need for greater training and some employees in particular expressed wanting more structured, direct training, despite a training manual not being
considered by employees as a key learning tool. This however could be the result of employees historically not having access to or experience with a training manual. CMHA, Kamloops Branch’s current training approach of experiential learning does fit with employee’s preferred means of learning, particularly those who responded that hands-on and visual learning were their preferences. It also meshes with the staff’s five preferred learning tools which include experience with clients, staff meetings, role modeling, time with co-workers and time with management. The disconnect however lay in staff understanding that CMHA, Kamloops Branch actually considers the aforementioned learning tools as training methods.

Some employees were also clear in their discontent with being trained by numerous staff although the Executive Director sees this as an important means to see diverse perspectives and styles. But in keeping with a Servant Leadership approach to service, including meeting the needs of employees, CMHA, Kamloops Branch needs to at least consider having specific employee trainers. Employees have argued for greater formalization of these and other practices as well as direct insight into CMHA’s overall vision of a training program and how each component fits within that training program. The findings are clear that, in moving forward, a formalized training approach that clearly outlines both formal and informal training components for employees is required.

There is also need for CMHA, Kamloops Branch to assess what methods will be most effective for information retention. The research shows that shelter staff are not successfully recalling information within the informal training mechanisms currently being used. This is evident, for example, in employee responses to what they learned in the orientation session which the Executive Director stated was one of the key mechanisms for providing employees an overall context for the client service model. When one considers that most employees stated they are visual and hands-on learner, CMHA, Kamloops Branch needs to rethink how to enhance employee capacity to retain information. Moreover, on-the-job training with other employees that are also not able to articulate the client service model appears to be the current norm, thereby impeding any real ability for employees to learn about the model. Although staff may be able to behaviourally implement pieces of the approach, one would reasonably argue that the inability to articulate the approach and all its components diminishes a staff’s capacity to effectively understand and implement the client service model as a whole.

Individual staff suitability was another important theme that came out of the research. Given the finding that CMHA management does not conduct performance reviews and currently lacks capacity to be more hands-on with its staff, one needs to consider the ramifications of this on client service. Although CMHA, Kamloops Branch maintains that
staff learn best when they are allowed to struggle through situations, a clear balance between this and direct supervision and guidance needs to be implemented. This was evident when considering the comment of one respondent who suggested there was no training at all for employees, a theme found throughout the respondent’s questionnaire. It is also relevant to the overall deficit in staff capacity to recall the name of the client model, the four needs categories and key Servant Leadership competencies.

Moving forward, CMHA needs to determine how to assess staff suitability via performance management tools such as interviews, performance evaluations and informal feedback. CMHA, Kamloops Branch however must also assess the impact training program deficits have on employee success or failure within their client service model and create a balanced approach between appropriate staff selection and staff training.

6.6 Organizational Culture: Something to Build On

Despite current deficits in CMHA, Kamloops Branch’s approach to client service, employee buy-in for the overall approach is high, given the majority of employee respondents feel it is at least moderately effective for meeting shelter clients' needs. Although there was disagreement on what made the model effective, CMHA, Kamloops Branch has managed to create an organizational culture that focuses on client needs within an ideology of followership. Employees consistently linked this idea to the shelter environment and shelter worker role and tasks, and some even linked it to certain needs categories and Servant Leadership competencies, although not to the overall model. CMHA, Kamloops Branch can now build on this buy-in and enhance their organizational culture and capacity to implement their client service model through more clear, intentional, formalized training.

6.7 Key Findings from the Project

Overall, a number of key findings presented themselves within the research.

6.7.1. Agency Understanding of Servant Leadership and Choice Theory from an Overall Theoretical Perspective

- CMHA, Kamloops Branch has only partially grounded its client service model in strong theoretical and empirical evidence - CMHA, Kamloops Branch has only partially woven empirically-based literature into its current use of a Servant Leadership/Choice Theory model of client service. This provides opportunity to greater ground the model within empirically-based literature to enhance success outcomes from the model.
Ambiguity exists within CMHA, Kamloops Branch’s definition of Servant Leadership and Choice Theory within its client service model - although the Executive Director had a philosophical understanding of what he envisioned for both components, there is still ambiguity amongst staff and management about how they are defined theoretically and within the organizational context. This is especially the case for Choice Theory which the Executive Director acknowledged has not been identified specifically by the name Choice Theory outside of management. This leaves both management and staff inconsistently defining and implementing them within the client service model.

CMHA, Kamloops Branch has not effectively linked Servant Leadership and Choice Theory – there are deficits in the Agency’s linkages between the two components and how those linkages are directly related to client service.

6.7.2. Servant Leadership Characteristics and Choice Theory Needs Categories

CMHA, Kamloops Branch has not wholly determined which Servant Leadership characteristics are best suited for both the shelter context and the overall agency context – the research demonstrates that the Executive Director and staff have only a partial grasp on Servant Leadership characteristics and how they specifically link to CMHA, Kamloops Branch’s approach to client service.

CMHA, Kamloops Branch has not entirely defined and described the behavioural components for each Servant Leadership characteristic and Needs Categories—although a foundation is evident, CMHA, Kamloops Branch’s current model of client service has gaps in clearly outlining what each characteristic and needs category encompasses both holistically and within the Agency context.

Employees and the Executive Director have a behavioural foundation for some espoused Servant Leadership characteristics and the four needs categories – there is evidence that staff and the Executive Director have at least a minimalist behavioural foundation; what is missing is staff capacity to specifically link behaviour to the client service model. Staff training is not adequately supporting staff to identify and comprehend these linkages.

Employees and the Executive Director can adequately link behaviour to client need and client success outcomes - although employees are unable to consistently name the Servant Leadership characteristics and Needs Categories, employees have capacity to outline examples relevant to the model as well as the outcomes that specific employee behaviours have on clients including harmful outcomes.

6.7.3. Shelter Worker Tasks, Role and Environment

CMHA, Kamloops Branch shelter staff have an understanding of key shelter tasks
and the role of the shelter environment in meeting client need - employees have insight into key tasks for a shelter worker in helping to either meet or hinder client needs. Staff also recognize the link between their role, the environment and creating a safe atmosphere for clients. There is a clear connect for staff between their behaviour within the shelter worker role and client outcomes.

- **CMHA, Kamloops Branch has only partially linked shelter worker tasks, role and environment to their Servant Leadership/Choice Theory model of client service** – there is evidence that employees and the Executive Director are not directly linking the shelter worker role and shelter environment to the client service model, thereby leaving a gap in how tasks and environment facilitate meeting specific client need categories.

6.7.4. Employee Training and Learning

- **CMHA, Kamloops Branch’s training program lacks structure and clarity** – both staff and management were clear in the need for a more detailed, structured, involved training program that clearly ties the overall theoretical model to behavioural components. Staff argued for greater clarity and intention in the training tools and techniques being used and have asked for more concrete, specific training opportunities. Despite CMHA, Kamloops Branch arguing for diverse training partners, employees want specific trainers to mitigate inconsistencies they see as happening within training.

- **CMHA, Kamloops Branch’s training program has an opportunity to better amalgamate specific training tools and techniques to employee learning styles** – certain training components that are currently being utilized mesh well with staff learning styles. This is an opportunity for CMHA to build on this existing foundation.

- **CMHA, Kamloops Branch management needs to be more involved and intentional in their role as both supervisor and trainer** – although considered by many to be supportive, staff have suggested that CMHA, Kamloops Branch management needs to be more involved as supervisors and trainers. Employees are looking for more direct feedback including performance reviews as well as greater management participation and input when staff have difficulties. CMHA, Kamloops Branch may also not have adequate measures in place to assess employee suitability. There is also a need for management to have greater capacity to both articulate the orientation and provide clear guidance in teaching it behaviourally. Overall, greater consistency from management is fundamental to the model's success.

- **Gaps exist in CMHA, Kamloops Branch's evaluative processes for its training program** – discrepancies in employee training and capacity to integrate what they
learn into their thinking and behaviour suggests deficits in training program evaluation. Current levels of individual employee evaluation on training, learning mechanisms and ability to implement the client service model are insufficient.

6.7.5. Organizational Culture: Employee Buy-in of the Client Service Model

- **CMHA, Kamloops Branch has employee buy-in for the client service model** – despite gaps in naming and defining the approach and its parameters, CMHA, Kamloops Branch has created an organizational culture that facilitates staff buy-in for a Servant Leadership/Choice Theory model of client service. What is unclear is what factors specifically contributed to that buy-in and how they can influence both the training and success potential for the model.
7.0 RECOMMENDATIONS

This chapter outlines recommendations to Canadian Mental Health Association, Kamloops Branch based on the research findings related to these three research questions:

- **What deficits currently exist in CMHA, Kamloops Branch’s training plan that hinders staff’s capacity to meet CMHA’s priority outcome of meeting client need within this client service model?**
- **How can CMHA, Kamloops Branch more effectively train employees in its Servant Leadership/Choice Theory model of client service?**
- **What specific tools need to be implemented to improve CMHA, Kamloops Branch’s training?**

Two sets of recommendations are provided. The first set reinforces CMHA, Kamloops Branch's goal of adopting an integrated Servant Leadership/Choice Theory model of client service and provides areas of consideration for moving the model forward. The second set outlines practical training recommendations.

7.1 CMHA, Kamloops Branch Adopt an Integrated Servant Leadership/Choice Theory Model of Client Service

It is recommended that CMHA, Kamloops Branch maintain its goal of using a Servant Leadership/Choice Theory model of client service and work toward greater integration of the two components. The following guidelines are suggested:

7.1.1 Adopt Servant Leadership

It is recommended that CMHA, Kamloops Branch adopt the Servant Leadership model and the associated competencies of altruistic calling; emotional healing; leads with moral authority; person of character; stewardship; and wisdom.

7.1.2 Adopt Choice Theory

It is recommended that CMHA, Kamloops Branch adopt the Choice Theory Model and the needs categories of love and belonging; power; freedom; and fun.
7.1.3 Clearly Link Servant Leadership and Choice Theory

It is suggested that CMHA, Kamloops Branch be intentional and concise in theoretically and operationally linking Servant Leadership and Choice Theory. In particular, linking the model to specific employee roles, tasks, and work environment may be fruitful.

It would be fruitful for CMHA, Kamloops Branch to prioritize this recommendation and finalize its client service model prior to moving onto the second sets of recommendations.

7.2 CMHA, Kamloops Branch Design and Implement a Comprehensive Training Plan for its Servant Leadership/Choice Theory Model of Client Service.

It is recommended that CMHA, Kamloops Branch adopt a comprehensive training plan that will heighten capacity to effectively train its employees in its Servant Leadership/Choice Theory model of client service. The training recommendations encompass three areas: orientation; training practices; and evaluation.

7.2.1. Establish Consistent Orientation Materials and Process for New Employees across CMHA, Kamloops Branch

It is suggested that CMHA, Kamloops Branch invest in designing consistent orientations materials and process for new employees. This may be considered the first step in the training process and thus a priority. Cost will be dependent on the depth of the orientation process, as determined by CMHA, Kamloops Branch.

7.2.2. Build Concrete Structure and Clarity into CMHA, Kamloops Branch’s Training Program

It is recommended that CMHA, Kamloops Branch formalize its training plan while still using key components of its current training. Recommendations consider both agency and employee needs. To facilitate this process, numerous suggestions are provided.

7.2.2.1 Formalize Key Training Mechanisms

CMHA, Kamloops Branch may wish to formalize and structure a number of key training mechanisms that meet both agency capacity and employee need. Training areas to consider include formalized training sessions; staff meetings; role modeling, peer training and mentorship; experiential learning with clients that encompasses evaluation and feedback; presentations; and external training courses. Given current operational practices, CMHA, Kamloops Branch can likely integrate more structure to some of these training options in a timely and cost effective manner.
7.2.2.2 Create a Training Manual

CMHA, Kamloops Branch may want to create a comprehensive training manual that outlines the Servant Leadership/Choice Theory model of client service, the overall training program as well as key employee training checklists. It is recommended that the agency prioritize a training manual; however, the agency may need to consider creating the manual over time, depending on financial and human resource capacity.

7.2.2.3 Maintain Informal Training Practices

It is recommended that CMHA, Kamloops Branch maintain informal training to complement formalized training practices. To uphold their value, CMHA, Kamloops Branch may want to consider discussing the informal training practices in the training manual. CMHA, Kamloops Branch may also wish to provide greater education on the value of these practices in training. Prioritizing this recommendation may be considered secondary, depending on time and money.

7.2.2.4 Identify and Train Specific Trainers

To promote consistency and clarity in training, it is recommended that CMHA, Kamloops Branch identify specific employees to be trainers. It is suggested that the agency consider the Servant Leadership/Choice Theory model in determining the criteria for trainers. It is recommended that CMHA, Kamloops Branch make this a priority to provide the agency adequate time to choose its trainers prior to implementing the formalized training plan.

7.2.2.5 Increase the Role of Management in Training and Supervision

It is recommended that CMHA, Kamloops Branch management play a greater role in both training and supervision. Considering the trust that many employees have for the management team, heightening management’s role in formal and informal training may enhance learning and organizational trust.

7.2.2.6 Provide Opportunities for Different Learning Styles

CMHA, Kamloops Branch may want to provide opportunity for both individual and group learning. In keeping with a Followership approach, CMHA may wish to attain current feedback from each employee to help individualize training that is rooted in individual learning styles and needs. An approach that provides extensive hands-on and visual learning capacity is also recommended.
7.23 CMHA, Kamloops Branch Build in Concrete Training Evaluation

It is recommended that CMHA, Kamloops Branch build tangible training and program evaluation. The following guidelines may be fruitful:

7.2.3.1 Assess Training Components Individually and Holistically

It is suggested that CMHA, Kamloops Branch implement evaluation tools that assess individual training components on their own and as they relate to the training plan as a whole. To be responsive, assessment mechanisms will likely be diverse and may include pre- and post-test learning, employee feedback, questionnaires, and employee evaluations, among others.

7.2.3.2 Increase Employee Evaluation and Performance Management

CMHA, Kamloops Branch may wish to implement formalized employee evaluation and resources permitting, a formalized employee performance management system. Employee evaluation may also include informal, immediate feedback and greater overall supervision.

7.2.3.3. Regularly Attain Employee Feedback on Training Needs

It is recommended that CMHA, Kamloops Branch attain employee feedback on training needs, wants, skill-base and knowledge deficits to inform training deficits and gaps as well as strengths.

7.2.3.4 Regularly Assess Training Program Capacity to Effectively Train Employees in CMHA, Kamloops Branch’s Servant Leadership/Choice Theory model of Client Service.

It is suggested that CMHA, Kamloops Branch conduct regular assessment of its training program to determine its responsive to the client service model. Both yearly and ongoing assessment may be considered.

7.2.3.5 Attain Client Feedback on Client Service

CMHA, Kamloops Branch may want to include client feedback on employee and program performance to help determine the effectiveness level of training and the overall client service model.
8.0 CONCLUSION

CMHA, Kamloops Branch was interested in determining how to better implement its Servant Leadership/Choice Theory model of client service. This research project attempted to assess the model, provide gaps within the approach and put forth recommendations to help CMHA, Kamloops Branch move forward. The research found that staff have at least a minimalist understanding of the approach and in some key ways, are able to link their behaviours to the outcomes that CMHA, Kamloops Branch is looking for around client service. What is lacking however is consistent training that permits staff to directly link the approach to their behaviours with clients. The project has thus attempted to put forth clear recommendations that will allow CMHA, Kamloops to better define and link the various components within the approach as well as means for improving employee knowledge and skill set to implement the approach through intentional training and evaluation.

When considering future areas to research, it would be fruitful for CMHA to assess the approach from a client’s perspective and to delve deeper into other approaches that could potentially complement this approach. Training parameters, while discussed in some depth, may also be another future area for CMHA to consider. As a whole, this project lends itself to almost as many questions as it answers, thereby creating great opportunities for future research.
9.0 REFERENCES


Valeri, D. P. (2007). *The origins of servant leadership*. Greenleaf University, St. Louis, MO.


Appendix A: Consent Form - CMHA Executive Director

Consent Form For CMHA’s Executive Director

Servant Leadership/Choice Theory Orientation: A Training Model for Non-Profits

As you are aware, I am a graduate student in the Community Development program at the University of Victoria's School of Public Administration. I am currently working with the Canadian Mental Health Association-Kamloops Branch to complete my Master's project.

You are being asked to participate in an in-person interview as you have been identified as the founder of the agency's current philosophy and training protocol.

Purpose and Objective of the Research

The purpose of the study is to explore the current effectiveness of CMHA's training protocol for its Servant Leadership/Choice Theory orientation. The goal is to determine the strengths and challenges of the current training model, means by which to improve staff training, and the training components staff feel they most need help with. The overall objective thus is to assess the current training model and design a new model that builds on the previous model’s strengths to ensure staff have the most adequate training possible to effectively implement CMHA's servant leadership/choice theory approach to client service.

Research Relevance

CMHA is committed to providing its staff the best training possible to meeting its priority outcome of meeting client needs above all else. This research will give CMHA insight into the level of effectiveness of its training protocol from those who use it regularly. The information attained from this study can potentially help CMHA attain a better grasp on how to turn its philosophy into practice and what specific training its frontline staff need.

Voluntary Participation

Please be assured that your participation in this project is voluntary and you are under no obligation to participate. There will be no negative consequences if you decide not to participate. You may also request that some of the information you provide during the interview not be used and you may withdraw your full participation at any time. I will then remove any information that you have provided in this interview by shredding transcripts and deleting electronic files.
Procedure

You are being asked to participate in an in-person interview that will take approximately one hour to conduct.

Data Collection Methods

The interview will be taped and the information will be electronically transcribed. Once this transcription is finalized, the tape will be erased and the transcribed information will be password protected on a computer. I will dispose of all data associated with the project within five years of this signing of this form.

Compensation

There will be no compensation for your involvement in the study.

Benefits of the Project

Potential benefits include heightening CMHA's capacity to effectively train its employees in its servant leadership/choice theory orientation; increasing staff confidence in implementing the approach; meeting client need more effectively and within a more compassionate and empowering approach; and determining the role a servant leadership/choice theory orientation can possibly play in non-profit sector.

Risk to Your Anonymity

Due to the unique nature of your position within the agency, I am unable to guarantee your confidentiality within the final report. By agreeing to participate in this research, you are consenting to having your name and position included in the study results and final report. However, I will remind you that your participation is voluntary and you can withdraw from any time during the study and your data will be discarded from the study including analysis.

Project Report

As part of my school requirements, I will write a report about this project and share it with Canadian Mental Health Association-Kamloops Branch for review, revision and approval. Moreover, the data collected and the findings may be considered for publication. The final report may also be used within a dissertation or class presentation as well as presented at scholarly meetings. Moreover, the data collected and the findings may be considered for publication. Participants may also request a copy of the final report.

Questions?
Please contact the researcher, Charlene Eden, UVIC Master's student at 250-828-8662 or email me at chareden@uvic.ca. You may also contact my UVIC Academic Supervisor, Rich Marcy, at 250-721-8054 or rmarcy@uvic.ca.

In addition, you may verify the ethical approval of this project or raise any concerns you may have by contacting the Human Research Ethics Office at the University of Victoria at 250-472-4545 or ethics@uvic.ca.

Sincerely,

Charlene Eden

Student

Your signature below indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researchers, and that you consent to participate in this research project.

_________________________  ___________________________  _____________
Name of Participant      Signature          Date

Future Consent:

There is the possibility that this research will be used in future research projects. However, you have the option of disallowing your data to be used in future research as well as the option of being informed about the research before consent is given. Furthermore, should you give consent, you may also withdraw this consent at any time by contacting the research and data will not be used in future studies. Please initial one of the three options below:

I consent to the use of my data in future research: ________________

I do not consent to the use of my data in future research: ________________

I consent to be contacted in the event my data is requested for future research: ____________

A copy of this consent will be left with you, and a copy will be taken by the researcher.
Appendix B: Recruitment Materials - Invitation to Complete Survey

Draft Invitation Letter to Emerald Centre Employees to Complete Online Questionnaire for Evaluation Project (via email)

Dear Emerald Centre employee,

This letter is to invite you to fill out an online survey as part of the project entitled "Servant Leadership/Choice Theory Orientation: A Training Model for Non-Profits:. As you may be aware, Charlene Eden, a graduate student in the Community Development program at the University of Victoria's School of Administration will be working with Canadian Mental Health Association-Kamloops Branch to complete her Masters Projects.

You are being sent this email as you are a CMHA employee that specifically works as a shelter worker at Emerald Centre. By completing and submitting this online survey, it is assumed that you have provided your free and informed consent and understand the conditions of participation in this study. Please read the information below before making your decision.

Purpose and Objective of the Research

The purpose of the study is to explore the current effectiveness of CMHA's training protocol for its Servant Leadership/Choice Theory orientation. The goal is to determine the strengths and challenges of the current training model, means by which to improve staff training, and the training components staff feel they most need help with. The overall objective thus is to assess the current training model and design a new model that builds on the previous model’s strengths to ensure staff have the most adequate training possible to effectively implement CMHA’s servant leadership/choice theory approach to client service.

Research Relevance

CMHA is committed to providing its staff the best training possible to meeting its priority outcome of meeting client needs above all else. This research will give CMHA insight into the level of effectiveness of its training protocol from those who use it regularly. The information attained from this study can potentially help CMHA attain a better grasp on how to turn its philosophy into practice and what specific training its frontline staff need.

Voluntary Participation
Please be assured that your participation in this project is voluntary and you are under no obligation to participate. There will be no negative consequences if you decide not to participate. However, due to the anonymous nature of the survey, it may be logistically impossible to remove individual participant data.

**Data Disposal**

All data associated with the project will be disposed of within five years of the researcher receiving the online survey data.

**Procedure**

You are being asked to participate fill out an online survey through Fluid Survey, a Canadian online tool, that will take approximately one hour. Within one week of receiving this letter, I will be sending another email with the link attached for the online survey.

**Compensation**

There will be no compensation for your involvement in the study.

**Benefits of the Project**

Potential benefits include heightening CMHA’s capacity to effectively train its employees in its servant leadership/choice theory orientation through staff input; increasing staff confidence in implementing the approach; meeting client need more effectively and within a more compassionate and empowering approach; acquiring better training and skill set; and determining the role a servant leadership/choice theory orientation can possibly play in non-profit sector.

**Researcher’s Relationship with Participants**

The researcher, being your direct supervisor, has a relationship with you, the potential participant. To help prevent this relationship from influencing your decision to participate, the following steps to prevent coercion have been taken:

- use of a third party recruiter
- use of an online survey tool
- no use of compensation
- participation has no bearing on employment status
Risks

There are a few potential risks to you, the participant, such as a feeling of psychological discomfort, fatigue or stress when answering the questions. To address this risk, it is essential that you, the potential participant, understands the goal of this study is to assess how CMHA can improve its staff training program. Thus both the agency and the researcher acknowledge that there are gaps in CMHA’s programs and some of those gaps will become evident through the responses you provide. This study is not a critique of employees; rather it is a means to determine how CMHA can provide you with better training. Moreover, should you require debriefing after your participation, the following options are available to you:

- Potential participants can access to a counsellor through the organization's benefits to EAP.
- Potential participants can choose to speak to an organizational manager (excluding the researcher) or Board member about their concern

Anonymity and Confidentiality

Anonymity and confidentiality will be protected as much as possible. To mitigate the researcher knowing you specifically participated in the study, an online survey is being used to collect data.

Moreover, in the written project, participants will solely be known by a number. However, there are limits to confidentiality. In the report, it may be possible to identify individual participants by their responses. Due to the limited amount of individuals that work at Emerald Centre, anyone reading the final report will know the data came from Emerald Centre employees and individuals may attempt to guess or identity you in the report. The researcher, however, will attempt to disseminate findings in a manner that mitigates this issues.

Moreover, all electronic data will be password protected on a laptop and the back-up flash drive will be locked up whenever it is not being used.

Future Consent

There is the possibility that this research will be used in future research projects. Thus, participating in this research project by filling out the online survey means you agree to your data potentially being used in future research.

Project Report

As part of her school requirements, the researcher will write a report about this project and share it with Canadian Mental Health Association-Kamloops Branch for review, revision and
approval. The final report may also be used within a dissertation or class presentation as well as presented at scholarly meetings. Moreover, the data collected and the findings may be considered for publication. Participants may also request a copy of the final report.

Questions?

Should you have questions, please contact me, Lauren White (Third Party recruiter) at 250-374-0440 or lauren.white@cmha.bc.ca. You may also contact Charlene's UVIC Academic Supervisor, Rich Marcy, at 250-721-8054 or rtmarcy@uvic.ca

In addition, you may verify the ethical approval of this project or raise any concerns you may have by contacting the Human Research Ethics Office at the University of Victoria at 250-472-4545 or ethics@uvic.ca/

Sincerely,

Lauren White
Third Party Recruiter

Please retain a copy of this letter for your reference.
Appendix C: Interview Questions for Executive Director

Questions for Interview with Canadian Mental Health Association-Kamloops Branch’s Executive Director

1. You were the founder of the idea that Servant leadership/choice theory orientation was necessary for CMHA and in particular, the shelter program. Can you first explain the orientation in your own words?

2. For what reasons did you believe this orientation was the right one for CMHA and in particular, Emerald Centre?

3. How would you specifically define servant leadership?

4. What do you see as the key characteristics of a good servant leader?

5. How would you define effective listening?

6. Describe an example that illustrates the effective use of listening in the shelter.

7. Describe an example that illustrates the poor listening skills.

8. Describe an example that illustrates the effective use of empathy.

9. Describe an example that illustrates poor use of empathy.

10. Describe an example that illustrates how staff can put their needs aside to meet a client's needs.

11. Describe an example that illustrates how staff put their needs above client needs.

12. Describe an example that illustrates effective commitment to the growth of a client.

13. Describe an example that illustrates poor commitment to the growth of a client.

14. In your words, what are the four needs categories as outlined by Choice Theory?

15. Describe an example that illustrates staff effectively meeting a client's need for love and belonging.
16. Describe an example that illustrates staff poorly meeting a client's need for love and belonging.

17. Describe an example that illustrates staff effectively meeting a client's need for power.

18. Describe an example that illustrates staff poorly meeting a client's need for power.

19. Describe an example that illustrates staff effectively meeting a client's need for fun.

20. Describe an example that illustrates staff poorly meeting a client's need for fun.

21. Describe an example that illustrates staff effectively meeting a client's need for freedom.

22. Describe an example that illustrates staff poorly meeting a client's need for freedom.

23. Can you describe how CMHA's environment at the shelter is designed to help meet client need?

24. What do you see as a shelter worker's role in the shelter?

25. Can you explain CMHA's training program for the shelter?

26. What do you see as its strengths?

27. What do you see as its weaknesses?

28. What do you think are the three most important pieces of learning that staff get?

29. On a scale of 1 to 5, with 1 being outstanding and 5 being poor, how would you rank the training that staff is given? Please explain your ranking.

30. What training techniques do you personally employ? For what reasons do you use these techniques?

31. How would you describe management’s overall leadership approach?

32. What can management do better?
33. What training techniques do you believe current CMHA staff learn best from?

34. What do you see as some of the struggles staff currently have with implementing this orientation?

35. What do you believe needs to be added to the training program?

36. What do you see as management’s role in training?

37. Outside of management training staff, what other means can be used for training?

38. On a scale of 1-5 with 1 being the least difficult and 5 being the most difficult, how difficult is it to implement CMHA’s approach to client service? Please explain your ranking.

39. What do you consider the biggest barriers to adequate implementation of this approach?

40. What can be done to overcome this barrier?

41. Do you think anything needs to be added to or changed about the orientation?

42. Are there other things from other approaches that you could see included?

43. Is there anything else you would like to add?
Appendix D: Online Questionnaire

Questions for the Online Survey with Emerald Centre Employees

Thank you for choosing to participate in this research. The survey, which consists of 40 questions, will take approximately 60 to 90 minutes to complete. Please answer the questions to the best of your ability. You may choose to answer any or all of the questions. If there are questions that you do not wish to answer or that you feel you cannot answer, leave the answer space blank for a question and move onto the next one. If you cannot complete the questionnaire in one sitting or wish to think about a question before responding, please use the "save and continue" button at the bottom of each page and follow the instructions. However, please note that once you click the "next" button to move on to the following question, you will be unable to go back to the previous question(s). Therefore, please ensure you do not move onto the next question until you are happy with your response. At the end of the questionnaire, a "submit" button will appear. Please click this button to submit your questionnaire. A reminder that participation in this questionnaire is completely voluntary, thus you may choose to terminate your participation at any time prior to submitting your questionnaire. If you wish to terminate your participation, you may use the "discard" button at the bottom of the page. Please note however that this button erases all your responses permanently and should not be used if you are planning to continue in the study. When answering questions, please be mindful of how you answer the questions so as to ensure yours and others’ right to anonymity. Please do not use individual’s names (including your own unless you choose to waive your own right to anonymity) or provide information that may identify individuals. Also, please do not discuss the survey or your responses with other potential participants as this may skew the responses and provide the researcher with invalid data. Lastly, please submit the survey no later than January 31, 2014. Again, thank you very much for participating!

1. During your first orientation session, Executive Director Doug Sage spoke at length about the agency's overall philosophy and approach to client service. What three things stood out for you in that orientation session?

2. CMHA-Kamloops Branch uses a specific leadership approach within all aspects of the agency. What is the name of this leadership approach?

3. Please explain, in your own words, what this leadership approach looks like.

4. What do you consider the five most important characteristics of a good servant leader? Briefly describe each one and explain why you chose it as one of your five characteristics.

5. Describe an example of a time when you or others did something that illustrated EFFECTIVE listening with a client. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated EFFECTIVE listening with a client? What was the outcome?

6. Describe an example of a time when you or others did something that illustrated POOR
listening with a client. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated POOR listening with a client? What was the outcome?

7. Describe an example of a time when you or others did something that illustrated EXCELLENT use of empathy with a client. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated EXCELLENT use of empathy with a client? What was the outcome?

8. Describe an example of a time when you or others did something that illustrated POOR use of empathy with a client. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated POOR use of empathy with a client? What was the outcome?

9. Describe an example of a time when you or others did something that illustrated putting one's own needs ASIDE to meet a client's needs. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated putting his or her own needs aside to meet a client's needs? What was the outcome?

10. Describe an example of a time when you or others did something that illustrated putting one's own needs AHEAD OF a client's needs. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated putting his or her own needs AHEAD OF a client's needs? What was the outcome?

11. Describe an example of a time when you or others did something that illustrated EXCELLENT commitment to the growth of a client. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated EXCELLENT commitment to the growth of a client? What was the outcome?

12. Describe an example of a time when you or others did something that illustrated POOR commitment to the growth of a client. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated POOR commitment to the growth a client? What was the outcome?

13. In conjunction with a servant leadership philosophy, CMHA's approach to client service is rooted in a belief that all individuals have four specific needs. What are those four needs. Please name and briefly describe each one.

14. Describe an example of a time when you or others did something that illustrated EFFECTIVELY meeting a client's need for love and belonging. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated EFFECTIVELY meeting a client's need for love and belonging? What was the outcome?

15. Describe an example of a time when you or others did something that illustrated POORLY
meeting a client's need for love and belonging. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated POORLY meeting a client's need for love and belonging? What was the outcome?

16. Describe an example of a time when you or others did something that illustrated EFFECTIVELY meeting a client's need for power. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated EFFECTIVELY meeting a client's need for power? What was the outcome?

17. Describe an example of a time when you or others did something that illustrated POORLY meeting a client's need for power. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated POORLY meeting a client's need for power? What was the outcome?

18. Describe an example of a time when you or others did something that illustrated EFFECTIVELY meeting a client's need for freedom. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated EFFECTIVELY meeting a client's need for freedom? What was the outcome?

19. Describe an example of a time when you or others did something that illustrated POORLY meeting a client's need for freedom. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated POORLY meeting a client's need for freedom? What was the outcome?

20. Describe an example of a time when you or others did something that illustrated EFFECTIVELY meeting a client's need for fun. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated EFFECTIVELY meeting a client's need for fun? What was the outcome?

21. Describe an example of a time when you or others did something that illustrated POORLY meeting a client's need for fun. Please use the following format in your answer: What was the situation? What did the worker specifically do that illustrated POORLY meeting a client's need for fun? What was the outcome?

22. As a shelter worker, what specific tasks are you expected to do to help meet these four needs in clients? Please explain.

23. How has CMHA's environment been designed to help meet client needs? Please explain.

24. Overall, what is your role as a shelter worker? Please describe your role in your own words.

25. In your opinion, how effective is CMHA's approach to client service? Please explain. What specific factors make it effective and ineffective?
26. How do you feel this approach fits with the clientele served by Emerald Centre? Please explain.

27. What, if anything would you like to see changed about CMHA’s approach to client service? Please explain.


29. What are the three most important pieces of learning you have implemented due to you employee training? Please explain.

30. Please rank the following learning opportunities, with 1 being the means by which you personally attain the most learning and 12 being the means by which you personally attain the least learning: staff meetings, role modeling, time with management, experience with clients, policy and procedures manual, external training such as Mental Health First Aid, co-workers, training manual, informal feedback, performance reviews, group training exercises, other (please explain). Please briefly explain your ranking system.

31. How would you personally describe management’s leadership approach to staff training? What could management do better? What does management do well? Please explain.

32. How do you feel management’s leadership approach to staff training fits with your preferred learning style(s)? Please explain.

33. On a scale of 1-5, with 1 being the MOST difficult and 5 being the LEAST difficult, how difficult is it to implement CMHA’s approach to client service? Please explain your ranking. In what ways, if any, is this linked to your staff training?

34. How would you rate your current capacity to implement CMHA’s approach to client service? Please choose one of the following: very good, good, satisfactory, poor, very poor.

35. What are the biggest barriers to effectively implementing CMHA's approach to client service? Please explain.

36. On a scale of 1 to 5, with 1 being outstanding and 5 being poor, how would you rank the training you have received from CMHA? Please explain your ranking.

37. How can CMHA better train staff in its approach to client service? What, if anything, could be added to staff training?

38. What parts of CMHA's approach to client service do you excel at? Please explain.

39. What part of CMHA's approach to client service do you need to work on? Please explain.
40. Is there anything you would like to add?
Appendix E: Key Deliverables

A number of key deliverables within this project were also agreed upon as outlined below:

- Definition and overview of Servant Leadership
  1. Definition of Servant Leadership as outlined by the literature
  2. Overview of Servant Leadership characteristics as outlined by the literature

- Definition and overview of Choice Theory
  1. Definition of needs as outlined by Choice Theory
  2. Overview of the five needs categories within Choice Theory as outlined by William Glasser, the theory’s founder

- Definition and overview of CMHA’s perspective on Servant leadership
  1. Definition of Servant Leadership as outlined by the agency
  2. Servant Leadership characteristics as outlined by the agency
  3. Overall role of Servant Leadership within CMHA as outlined by the agency

- Definition and overview of CMHA’s perspective on Choice Theory
  1. Definition of needs as outlined by the agency
  2. Categories of needs as outlined by the agency
  3. Overall role of Choice Theory as outlined by the agency

- Discussion on the linkages between Servant Leadership and Choice Theory
  1. Theoretical and practical linkages as designed by the researcher through the use of research and theory
  2. Theoretical and practical linkages as outlined by the agency; how does the agency envision the linkage and what practical means are they using to make the linkage
  3. Overview of similarities and differences between these two aforementioned perspectives; linkages and gaps

- Assessment of CMHA’s current staff training program
  1. Overview of CMHA’s current training program
  2. Assessment of its capacity to adequately train staff in a Servant Leadership/Choice Theory orientation
3. Outline of both the strengths and the gaps in CMHA’s current staff training program

Assessment and overview of management’s capacity to adequately train staff within CMHA’s orientation
1. Overview of management’s current approach to training including techniques, personal strengths, etc.
2. Assessment of management’s capacity to adequately train staff in a Servant Leadership/Choice Theory orientation
3. Outline of both the trainers’ strengths and the gaps that exist within their training approaches

Assessment and overview of current staff understanding of CMHA’s Servant Leadership/Choice Theory orientation
1. Overview of staff’s knowledge level of Servant Leadership
2. Overview of staff’s knowledge level of Choice Theory
3. Overview of staff’s understanding of how the two approaches are linked to provide client service

Assessment and overview of current staff capacity to implement the aforementioned orientation
1. Overview of staff’s knowledge of techniques and behaviours advocated by CMHA for use within its Servant Leadership/Choice Theory orientation
2. Overview of techniques and behaviours actually used by staff to meet the agency’s Servant Leadership/Choice Theory orientation
3. Overview of staff’s challenges with implementing techniques and behaviours within a Servant Leadership/Choice Theory orientation

Assessment of current staff’s preferred learning approaches
1. Overview of the means by which current staff learn best
2. Overview of the linkages and gaps between staff’s preferred learning and CMHA’s training techniques

Assessment and overview of the linkages between agency training and staff understanding and implementation of CMHA’s Servant Leadership/Choice Theory orientation
1. Overview of gaps between CMHA’s “knowledge” training and staff knowledge
2. Overview of gaps between CMHA’s “implementation” training and staff’s capacity to implement the orientation
3. Overview of strengths within both the aforementioned areas; in other words, what is working

☐ Assessment of other orientations to determine their value to CMHA’s current orientation
   1. Short literature review on other orientations that could be potentially linked to CMHA’s Servant Leadership/Choice Theory orientation
   2. Conceptual framework that creates linkages between CMHA’s orientation and other orientations

☐ Training recommendations geared toward improving CMHA’s capacity to train its Servant Leadership/Choice Theory orientation
   1. Overview of the entire training situation
   2. Recommendations on what information to provide staff on its Servant Leadership/Choice Theory orientation
   3. Recommendations on training techniques that can be employed to heighten the potential for employee retention of information and techniques
   4. Recommendations on how to reinforce employee training over extended periods of time
   5. Recommendations on other orientations that can be integrated

As a whole, this project ideally will help to enhance CMHA’s capacity to meet client need by:

☐ Acquiring an overall theoretical and practical understanding of Servant Leadership and Choice Theory as they relate to a non-profit agency
☐ Acquiring an understanding of gaps between the literature, CMHA, and staff in terms of Servant Leadership, Choice Theory, the orientation as a whole and its implementation
☐ Acquiring insight into training gaps and potential means to fill those gaps
☐ Acquiring insight into training strengths and potential means to leverage those strengths
☐ Acquiring insight into how to appropriately implement its Servant Leadership/Choice Theory orientation
☐ Providing staff appropriate training in its philosophy
☐ Attaining new information on the role that other orientations can play in
enhancing its current orientation

- Heightening CMHA’s overall capacity to provide client service that adequately meets its priority outcome goal of meeting client need