Spaced Learning: The Antidote to Forgotten Compliance and Ethics Awareness

September 13, 2006
Agenda

• Introduction to Spaced Learning
  – Will Thalheimer PhD, President, Work-Learning Research

• How Meggitt PLC Utilizes Spaced Learning
  – Barney Rosenberg, Group Ethics and Business Conduct Manager, Meggitt PLC

• How Spaced Learning and Communication Impact Culture
  – Julie Moriarty, Vice President, Global Services, Midi
Introduction to Spaced Learning

Will Thalhemier, PhD
President
Work-Learning Research
“The spacing effect is one of the oldest and best documented phenomena in the history of learning and memory research.”

Harry Bahrick & Lynda Hall (2005)
*Journal of Memory and Language*
Time Sequence of How Learning Becomes Performance

1st Event

2nd Event

3rd Event

On-the-job Performance

Learning

Retention

Performance

2 weeks
Retrieval Curves

Learning  Retention  Performance

Compliance & ethics solutions that promote corporate trust
Question 1 – Who will learn the most about a particular topic?

A. Person who reviews the information once.

B. Person who reviews the information twice.

C. Person who reviews the information thrice.
Repetition (Research Example)

Value of Repetition

• Helps us absorb information we missed earlier
• Helps us remember things we’d forgotten
• Strengthens and enriches what we know
Examples of Repetition

Presentation

- Verbatim Repetition
- Paraphrases
- Stories, Examples

Retrieval Practice

- Testing, Practice, Exercises
- Simulations, Case Studies, Role Plays
- Discussions, Collaboration, Dialogue

Media Delivery

- Video, Audio, Graphics, other Media
Question 2 – Who will perform better on May 1st?

A. **Wide Spacing**
   Person who spends 18 hours (6/day) learning and relearning relevant material on Feb 1, Mar 1, April 1?

B. **Narrow Spacing**
   Person who spends 18 hours (6/day) learning and relearning relevant material on April 1, 2, and 3?

C. **Both will perform about the same.**
What would happen if we inserted spaced practice?

1st Event

2nd Event

3rd Event

Test

4 days

On-the-job Performance

Learning

Retention

Performance
Question 3 – What effect would inserted test have on retrieval?

A. Have no effect
B. Produce slight improvement
C. Produce significant improvement
D. Produce massive improvement
What causes the spacing effect?

A. **Wider spacings require more cognitive effort.**

B. **Wider spacings produce more varied retrieval routes through memory.**

C. **Wider spacings promote more retrieval failure, and thus encourage better learning practices.**
Reducing Retention Interval

- 106%
- 62%
- 32%

Compliance & ethics solutions that promote corporate trust
<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage Range</th>
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<tbody>
<tr>
<td>Initial Repetitions</td>
<td>30 to 110%</td>
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<tr>
<td>Subsequent Repetitions</td>
<td>15 to 40%</td>
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<td>Retrieval Practice</td>
<td>30 to 100%</td>
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<tr>
<td>Spacing</td>
<td>5 to 40%</td>
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<tr>
<td>Reduce Retention Interval</td>
<td>30 to 100%</td>
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<td>Totals (÷ 4)</td>
<td>25 to 100%</td>
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What is the ideal spacing?

1st Repetition

2nd Repetition

3rd Repetition

On-the-job Performance

Learning

Retention

Performance
What is the ideal spacing?

1\textsuperscript{st} Repetition

\begin{itemize}
  \item 3 days
\end{itemize}

2\textsuperscript{nd} Repetition

\begin{itemize}
  \item 3 days
\end{itemize}

3\textsuperscript{rd} Repetition

\begin{itemize}
  \item 3 days
\end{itemize}

On-the-job Performance

Learning — Retention — Performance

Compliance & ethics solutions that promote corporate trust
What if it’s logistically impossible to have ideal spacing interval?

1st Repetition
24 hours

2nd Repetition
24 hours

3rd Repetition
days/wk/mo

On-the-job Performance

Learning
Retention
Performance
What if 24 hours is impossible?

1st Repetition

2nd Repetition

3rd Repetition

On-the-job Performance

Learning → Retention → Performance

min > sec

days/wk/mo
What are the major findings from the research?

1. Repetitions support learning.
2. Spaced repetitions are generally more effective.
3. Both presentations and retrieval practice produce spacing benefits.
4. Spacing helps minimize forgetting.
5. Wider spacings are generally more effective.
6. Spacing may slow learning (while it improves remembering).
7. Gradually expanding the length of spacings is fine too.
8. A new learning frame—learning takes place over time.
How Meggitt PLC Utilizes Spaced Learning

Barney Rosenberg
Group Ethics and Business Conduct Manager
Meggitt PLC
Customers; Suppliers; Shareholders; Regulators
How they look at us
Spaced Learning in Practice

- Ethics and Business Conduct Policy
- Published Code of Conduct
- Copy of each with letter from CEO to all employees
- On-line training – 5 languages
- Live training if no Internet access
- Prior coordination with works councils
- Seminars for select groups of HR and Sales
- Ethical Moments to launch this month – one every two months for the next year. Then repeat Code of Conduct training
- Quarterly management ethics reviews
- Audit plan
• Adopted by the Board of Meggitt PLC
• May 12, 2005
Meggitt PLC and all subsidiary companies will conduct business fairly, impartially, and in full compliance with all applicable laws and regulations. Meggitt is firmly committed to integrity and honesty in all its business relationships, including those with customers, suppliers, communities and amongst employees. The highest standard of ethical behavior is expected from Meggitt employees and from those who act on the Company’s behalf in the performance of their professional responsibilities and in their own personal conduct.
• Each Meggitt site around the globe has a designated Ethics Coordinator
• They are part of the Ethics Program Office (EPO)
• Who is your Ethics Coordinator?
• Learn about the resources available to you
**Terry Twigger, Chief Executive:** Hello, I'm Terry Twigger, Chief Executive of Meggitt PLC. I'm pleased to welcome you to this training and to introduce you to Meggitt's Ethics and Business Conduct Program.

In our industry and in many others, the importance of ethical behavior is at an all-time high. Compliance with the laws and regulations that govern our industry is a critical first step, but more than that, it's expected that we will do the right thing. A good reputation takes years—even decades—to create, but only moments to destroy.

Select "SLIDE" to continue.
Ethics Line Phone Numbers

- Belgium: 0800 71025
- Canada: 1888 268 5816
- China: 10800 441 0078
- France: 0800 900 240
- Germany: 0800 182 3246
- Netherlands: 0800 022 9026
- Singapore: 800 4411 140
- Spain: 900 944 401
- Switzerland: 0800 563 823
- UK: 0800 374 199
- USA: 1877 533 5310
Global ethics line
+1 877 533 5310

Call with questions or concerns
+ confidentially
+ toll-free
+ anytime

or call Barney Rosenberg
Group Ethics and
Business Conduct Manager
+1 805 526 5700 x6654
Periodic Audit

- Has everyone received the Code & Policy
- Are Ethics Line #s posted
- Awareness of the Ethics program
- Who is your Ethics Coordinator
- Who is the Group Ethics and Business Conduct Manager
- Ethics line volume and response time
- Categories and frequency of issues raised
- Willingness to report concerns without fear of retaliation
OODA Loop

Observe → Orient → Decide → Act → Observe
People to contact

- Your line manager
- Her or his manager
- Human Resources
- Your general manager
- SBU head
- Your on-site ethics coordinator
- Anyone else you are comfortable talking to
- OR
• Barney Rosenberg
• Group Ethics and Business Conduct Manager
• barney.rosenberg@meggitt.com
• 805-526-5700 x 6654
You are not a one-"man"-band when it comes to Ethics and Business Conduct.
How Spaced Learning & Communication Impact Culture

Julie K. Moriarty
VP, Global Services
Midi
Reasons to Keep Awareness at an Optimal Level

• Knowledge is Good
  – Good employees do not want to make mistakes
  – Some compliance areas may not be obviously illegal or unethical (bribery, competition, etc.)
  – Business pressures can cause lapses, even when employees know the right thing to do
  – Even organizations with tightly controlled cultures are changing
    • New businesses
    • New geographic areas
    • Growth by merger or acquisition
    • New generations of employees joining with very different values than founders/management
Reasons to Keep Awareness at an Optimal Level

- Revised Sentencing Guidelines
  - Training is mandatory
    - obligation is ongoing, requiring periodic updates
  - Program must be effective
    - “check the box” programs not acceptable
  - Risk assessments are an important element of an effective program
  - Company should communicate periodically its standards and other aspects of its program
  - Ethics now part of definition of an effective program
  - Emphasis on culture that promotes legal and ethical behavior
Goals of an Effective E&C Program

• Generate objective evidence demonstrating existence of program and efforts to instill legal and ethical behavior in company culture

• Beyond statistics:
  • Create heightened and continued level of awareness
  • Ensure comprehension and recall
  • Inspire application of what has been learned
  • Embed values into corporate culture
  • Reinforce open dialogue
  • Revitalize employee and public perceptions of brand and leadership
  • Embed strong, consistent cultural values across globe
  • Strengthen employee retention
• Education should be done throughout the year
  – Courses on values, compliance risk areas, ethics and business behavior
  – Refreshers
  – Ethical Moments

• Don’t forget areas that may not be identified as a particular risk area, but which can exacerbate issues of non compliance such as:
  – Ethics
  – Internet Usage
  – Email Usage
  – Information Management
  – Communication Practices
# Sample Rollout Plan

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<th>Key</th>
<th>All/Majority of Employee Population</th>
<th>Selected Risk Groups - International</th>
<th>Phased Rollout</th>
<th>Ethical Moment</th>
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Maintaining Awareness

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MEGGITT
smart engineering for extreme environments

Compliance & ethics solutions that promote corporate trust
• Education cannot be done in a vacuum
  – It is not just “training”
• Messaging that introduces and accompanies education is as important as courses, particularly in global initiatives
• Ongoing and consistent messaging is critical for acceptance of values and policies being taught and promoted
• Organizations also need to anticipate and be prepared to manage communications coming back (help line calls, issues raised to management, etc.) as a result of increased awareness
Integrating Values Into Culture - Marketing

- Brand the initiative
  - Use consistent messaging and terminology
- Utilize posters and banners in common areas to promote awareness of the program
- Use promotional items to keep initiative top of mind
- Distribute quick reference cards with helpful information such as site access, helpline numbers, compliance and ethics contact information
Integrating Values Into Culture - Marketing

- Utilize company events such as sales meetings, divisional or business unit meetings, and management meetings to promote the program and drive compliance

- Publish articles & information in internal newsletters and intranet
  - Create a regular compliance and ethics column addressing timely issues related to the program or current business factors.
  - Illustrate the support of the executive team. Include quotes from and interviews with senior management

- Add links to current intranet sites making it easy for employees to access training, policies, etc.
• Host open houses to promote awareness and enthusiasm and give human face to E&C office
• Establish a ‘lunch and learn’ series to share important information about ethics and compliance topics and answer questions
• Conduct contests to generate interest and excitement and recognition for individuals and groups achieving E&C goals