

Visuals Record

WED 469 - Training Systems
Management

by

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Learning Objective Titles by Unit

The ten units of the course with their learning objectives are as follows:

Unit One - Human Resource Development

#1 - Review the Role and Function of Human Resource Development

Unit Two - Planning and Organization

#2 - Write an Organizational Mission Statement

- ▶ Purpose
- ▶ Goals
- ▶ Market(s)

#3 - Name the Instructional Organization

#4 - Create an Organizational Logo

#5 - Draw a Functional Organization Chart

Unit Three - Marketing

#6 - Prepare a Learning Needs Analysis

#7 - Prepare a Marketing Plan

Unit Four - Programming

#8 - Prepare a List of HPI Curricular Offerings

- ▶ Occupational Training
- ▶ Employee Education
- ▶ Staff Development

Unit Five - Staffing

#9 - Draw a Personnel Organization Chart

#10 - Prepare an Interview Questionnaire

Unit Six - Facilities Planning and Management

#11 - Draw a Preliminary Design Floorplan

#12 - Prepare a Set of Space-Use Inventory Forms

#13 - Prepare an Equipment-Supplies Order Form

Unit Seven - Financing and Budgeting

#14 - Prepare a First-year Operating Budget

Unit Eight - Assessment

#15 - Prepare an HPI “Program” Assessment Instrument

Unit Nine - Strategic Planning

#16 - Prepare a Strategic Plan Outline

WED 469 - Training Systems Management

Instructor: Richard Bortz

Orientation

Medallion

Process for Accessing Morris Library Course Reserve

Go to Morris Library home page at “www.lib.siu.edu”.

- ▶ Click on “Course Reserves” within the “Quick Links” box. (Takes you to the “SIU CAT” page).
- ▶ Select “Instructor” and “Course Name/Number” from “pulldown” menu.
- ▶ Click on “Search” button.
- ▶ Scroll down page to select reading. (Ordered by “Objective” and “Title”).

Objective #1

Organizational Resources

»»» Human Resources «««
Financial Resources
Capital Resources

Definition of Human Resources

William R. Tracy, in the *Human Resource Glossary*, defines “human resources” as the “the people who staff and operate an organization. . .”

Functions of Human Resources

Human Resource Development (HRD)

- ▶ HPI
- ▶ Organizational Development
- ▶ Career Development

Human Resources Management (HRM)

- ▶ Recruitment
- ▶ Selection
- ▶ Placement
- ▶ Appraisal
- ▶ Compensation
- ▶ Workforce Planning

Human Resources Environment (HRE)

- ▶ Job Enrichment
- ▶ Job Enlargement
- ▶ Organizational Development

Human Resource Development (HRD)

Adapting the original definition of Rothwell and Sredl in their book, *Professional Human Resource Development Roles and Competencies*, the authors define “human resource development” (HRD) as:

“The integrated use of [human performance improvement (HPI)], organizational development, and career development to improve individual, group and organizational effectiveness.”

Human Performance Improvement (HPI)

Organized learning experiences conducted for the purpose of improving work performance. The delivery of knowledge, attitudes, skills and habits (KASH) needed for employment.

Types of HPI

Training

- ▶ Stimulate *individual* change.
- ▶ Immediate, here and now
- ▶ Provides the necessary knowledge, attitudes, skills and formation of habits to perform one's tasks efficiently and effectively.

Education

- ▶ Stimulate *individual* change.
- ▶ More generalizable than training
- ▶ Broader application
- ▶ Provides new insights and upgrades skills in the occupation, industry or organization.

Development

- ▶ Stimulate *individual* change
- ▶ Like education, has a more generalizable, broader scope
- ▶ Grooming for leadership roles

Benefits of HPI

- ▶ Increased productivity
- ▶ Improved quality of product
- ▶ Innovation
- ▶ Fulfillment
- ▶ Ownership
- ▶ Readiness for change

HPI Organizations

Organizations which assume the responsibility of preparing the nation's workforce include:

- ▶ Corporations
- ▶ Apprenticeship Programs
- ▶ Proprietary Schools
- ▶ Military Organizations
- ▶ Government Organizations
- ▶ Formal Schooling
 - ▶ High Schools (Vocational Education)
 - ▶ Community Colleges (Technical Education)
 - ▶ Universities (Professional Education)
- ▶ Volunteer Organizations
 - ▶ Peace Corps
 - ▶ Habitat for Humanity
 - ▶ Rebuild Together
 - ▶ USA Freedom Corps
 - ▶ Americorp
 - ▶ Senior Corps

Economy

- ▶ U.S. growth and world growth tightly linked
- ▶ U. S. economy should grow at relatively healthy pace
- ▶ U.S. *manufacturing* declines while *service* sector grows
- ▶ U.S. manufacturing will have a *much smaller* market share of the world economy
- ▶ New jobs in service industries will demand *much* higher skill levels

Demographics

- ▶ U.S. workforce will *grow slowly*, become *older*, more *female* and more *disadvantaged*
- ▶ Pool of young workers will shrink
- ▶ More women will enter the workforce
- ▶ Immigrants will represent largest share of increase in the population and workforce since WWI

Challenges

- ▶ Improve the educational preparation of all workers
- ▶ Integrate black and Hispanic citizens fully into the economy
- ▶ Minorities will be larger share of new entries into the workforce
- ▶ Reconcile the conflicting needs of women, work and family

Course Terminology

- ▶ Organization-Department-Company
- ▶ “Learning Organization” vs “Instructional Organization”
- ▶ “Deliverable”/“Instruction”/ “KASH”

Roles

To begin the course, the learners have to assume a leadership role in organizing and planning one of the following types of organizations:

- ▶ Corporations
- ▶ Apprenticeship programs
- ▶ Proprietary organizations
- ▶ Military organizations
- ▶ Government organizations
- ▶ Secondary or post-secondary educational institutions
- ▶ Volunteer organizations

Completion of the course will result in the completion of an “Organizational Development Plan” for the type of organization selected by the individual.

Objective #2

Mission

A written statement which defines the organization's *purpose, goals* and *market(s)* to be served. Implicit in the mission statement is the direction to be taken by the leadership of the organiza-

tion and the opportunities they foresee
in the organization's future.

Embodied Characteristics of a Mission Statement

- ▶ Distinctive values
- ▶ Competitive domain
 - ▶ Industry scope
 - ▶ Market segment scope
 - ▶ Geographic scope
- ▶ Motivating
- ▶ Vision, direction
- ▶ Long term (10-20 years)

Influences

Five factors influence the mission of an organization:

- ▶ History
- ▶ Current preferences
- ▶ Environmental factors
- ▶ Resources
- ▶ Distinctive competencies

Components

The components of an organizational mission include the following:

- ▶ Purpose
- ▶ Goals
- ▶ Market(s)

System~Supra-system

Instructional Organization ~ Market

Characteristics of a Purpose

A written statement defining the relationship of a system to its suprasystem(s). A human system defines the relationship of the system to the suprasystem in terms of people and their needs (Jarett, Rader and Longhurst, 1970). A system's purpose is defined in the response to the question "why does the system exist?"

A purpose statement:

- ▶ Establishes a system's philosophic "**raison d'être.**"
- ▶ Justifies the system's **existence.**
- ▶ Establishes a **service** relationship between the system and its suprasystem.
- ▶ Defines the system in terms of **people and their needs.**
- ▶ Identifies the **market/clientele** to be served.
- ▶ Defines perceived **area(s) of responsibility.**

Components of an Organizational Purpose

- ▶ Organization/unit/department
- ▶ Service word
- ▶ Market(s) to be served
- ▶ Deliverable(s)

Purpose Statements

“The two-fold purpose of the Department of Professional Solutions is to provide employees with the knowledge, attitudes, skills and habits necessary for maintenance and advancement in the company; and insure customer satisfaction through the company’s manufacture and delivery of quality electronics equipment.”

“The purpose of the Department of Allied Health is to assist citizens of central Arizona achieve and maintain an optimal state of physical and mental health. The department’s contribution is to prepare allied health personnel who will promote sound preventive health-care practices and deliver acute patient care services.”

“The purpose of the Paying and Receiving unit is to provide banks, credit unions and other money distribution organizations in the region with a resource of people trained in paying and receiving.”

Goals

“Goals are statements of broad intent which are general and timeless. They are not concerned with the measurement of achievement within a specific time period.” (Nervig, 1984). “Goals give a sense of direction for the activities of an organization. They give broad guidelines toward which more detailed and specific plans are directed.” (Appleby, 1981). “A goal is a statement that tells the direction of an organization and defines the boundaries within which the organization will function.” (Bortz, 1986).

Goals

- ▶ Futuristic - Goals identify and define desired changes and improvements, not simply continue the status quo.
- ▶ Define and clarify responsibility and accountability.
- ▶ Solidify understanding.
- ▶ Provide standards against which individuals may test or compare personal objectives.
- ▶ Make possible measurement of program and organizational effectiveness.
- ▶ Provide framework for guidance of

group effort.

- ▶ Focus attention on end results rather than en route activity.
- ▶ Stimulate creative thinking.
- ▶ Provide a basis for matching of individuals with assignments.
- ▶ Create commitment.
- ▶ Provide sense of direction.
- ▶ Force alertness.
- ▶ Provide basis for rational utilization of resources.

Goals

The goals of the Department of Human Performance are to:

- ▶ Maintain a resource of people prepared to meet immediate and future labor, technical and managerial needs of the company, and
- ▶ Provide customers with introductory and in-service product application and maintenance programs and materials.

The goals of the department reflect faculty interest in teaching, research and service. The goals are to:

- ▶ Prepare undergraduate students for general nursing positions and graduate students for teaching, administration or clinical specialty positions in public and private health care delivery agencies;
- ▶ Contribute to the growing body of knowledge as it applies to nursing theory

and practice through research and publication;

- ▶ Provide service, as it pertains to nursing education, to individuals; the college and university; the nursing profession; and local, state, national and international public and private organizations.

The goals of the course are to have students:

- ▶ Realize the need for and benefits of an articulated, modularized, competency-based curriculum which coordinates the occupational and educational aspects of society,
- ▶ Understand the process of developing such a plan, and
- ▶ Developing training materials which reflect the suggested education, training and development approach.

Markets

- ▶ Relationship to organizational purpose and goals
- ▶ Niche
- ▶ Types of Markets
 - ▶ Single
 - ▶ Multiple
 - ▶ Stratified
 - ▶ Primary
 - ▶ Secondary
 - ▶ Tertiary
 - ▶ Combination

Markets/Clientele

- ▶ Management/administrative/executive
- ▶ Sales staff
- ▶ Technical staff
- ▶ Employees with basic education needs
- ▶ Customers
- ▶ Vendors
- ▶ Other

Objective #3

Names

- ▶ Representative vs global
 - ▶ “What’s in a name?”
- ▶ Types of titles
 - ▶ Definitive title
 - ▶ Acronyms
 - ▶ Sequence of letters
- ▶ Contrasting titles
 - ▶ “Training Department”
 - ▶ “Knowledge and Performance Solutions”
 - ▶ “Helix Knowledge”
 - ▶ “Human Performance Improvement”

Objective #4

Logos

- ▶ Representative of the organization
- ▶ Representative vs global
- ▶ Representative vs esoteric
 - ▶ SIU's "Tower"
 - ▶ Nike's "Swoosh"
 - ▶ Eric's "Helix"
- ▶ Shape
- ▶ Size
- ▶ Color
- ▶ Location
- ▶ Organizational Materials
 - ▶ Advertisements, clothing
 - ▶ Letterhead, envelopes
 - ▶ Business cards
 - ▶ Clothing
- ▶ Computer Program (Logos)
 - ▶ Microsoft Publisher

Objective #5

Types of Instructional Organizations

Type I - Internal

Type II - Few outside customers

Type III - Some outside customers

Type IV - Autonomous

Type I ~ Type IV

Type I Organization

- ▶ In-house
- ▶ One extreme of continuum
- ▶ Target group/market/clientele
 - ▶ Administration/Management
 - ▶ Sales
 - ▶ Technical
 - ▶ Employees with basic education needs
 - ▶ Customers
 - ▶ Vendors
 - ▶ Other

Type IV Organization

- ▶ Autonomous from parent organization
- ▶ Other end of continuum
- ▶ Client's needs
- ▶ Market/clientele/target group
 - ▶ Single
 - ▶ Multiple
 - ▶ Stratified
 - ▶ Primary, secondary, tertiary

Functional Organization Chart

Styles of Organization Charts

Objective #6

Learning Need

A learning need exists when an employee lacks the technical *knowledge*, appropriate *attitudes*, necessary *skills* and/or work *habits* to perform an assigned task(s) satisfactorily.

The problem would be resolved through the delivery of training, education and/or development types of activities that results in an improvement in performance (HPI) of the employee in the workplace.

KASH Formula

The four components of the “KASH formula” are:

- ▶ **K**nowledge
- ▶ **A**ttitudes
- ▶ **S**kills
- ▶ **H**abits

Learning, i.e. adding to, modifying, updating and/or reaffirming one’s KASH formula results in personal improvement, increased ability and work efficiency and effectiveness.

Optimals
- Actuals
Needs

Source: Main Event Management Corp.

Needs Assessment

- ▶ *A priori* to needs analysis
- ▶ Personal opinions, attitude surveys, financial statements, job descriptions, performance appraisals, work samples, historical documents

Needs Analysis

- ▶ Process of actually collecting employee data
- ▶ Collecting, compiling, analyzing, concluding, recommending and reporting of findings

Needs Analysis Process

1. Identify Target Population

- ▶ Distinguish individuals who need additional “KASH” (market)
- ▶ Propose HPI need, solution, strategies for delivery

2. Determine Data Sources

- ▶ Hard data
 - ▶ Factual
 - ▶ Real numbers, i.e. count, analyze, translate to statistics
 - ▶ Sources
 - ▶ Production reports, financial statements, defective parts reports, recall reports, absenteeism reports, job descriptions, performance appraisals, work samples, company historical documents, literature

reviews

- ▶ Soft data
 - ▶ Subjective (opinions, beliefs, views)
 - ▶ Group discussions/focus groups
 - ▶ Interviews
 - ▶ Questionnaires
 - ▶ Attitude surveys
 - ▶ Observations

3. Determine Data Collection Methods

- ▶ One/combination of methods
- ▶ Structured and unstructured approaches

4. Collect Data

- ▶ Administer questionnaires, conduct interviews, observe OJT performance
- ▶ Compile data

5. Analyze Data

- ▶ Present findings

- ▶ Narrative
- ▶ Graphics, charts, tables
- ▶ Statistical analysis
- ▶ Check accuracy/confirm results

6. Prepare Final Report

- ▶ Summary
- ▶ Indicate problems, needs
 - ▶ Conclusions
 - ▶ Recommendations
- ▶ Distribute to key personnel

Needs Analysis Checklist

- ▶ Who is the KASH recipient? Job functions?

- One or more departments?
- ▶ What deficiencies? Why deficient?
 - ▶ Objectives of the needs analysis?
 - ▶ How will needs analysis solve problems?
Benefit organization?
 - ▶ What are expected outcomes? Pervasive effect throughout organization (department, division, regional, corporate)?
 - ▶ What assessment instruments (questionnaire, interview, survey, test or combination) most appropriate? Who will administer instruments (in-house personnel, external consultants)?
 - ▶ Will analysis interrupt work process? What effect on workforce? Productivity?
 - ▶ Confidentiality policy? Will it be honored?

**Critical Competencies of
a Needs Analyst**

- ▶ Understands organizational structure, power, culture and informational systems
- ▶ Understands factors that contribute/hinder group/individual changes in organization
- ▶ Identifies knowledge/skills needed to perform tasks; assess individual abilities
- ▶ Possesses sufficient computer knowledge and skill to assist HPI and evaluation
- ▶ Observes and describes behavior objectively
- ▶ Develops sound data collection and analysis methods
- ▶ Processes, synthesizes and forms appropriate and objective conclusions about the data
- ▶ Provides constructive feedback
- ▶ Designs presentations; communicates information, makes recommendations, suggestions, ideas

Objective #7

Marketing Plan

The major question being addressed in formulating an organizational marketing plan is:

“What is your plan for meeting the needs of one or more of the markets served by your organization?”

Definition of Market

“People who have the authority to make decisions and have the money or credit to buy a product or service that satisfies their wants or needs”

Types of Markets

- ▶ **Consumer (general public)**
- ▶ **Commercial/industrial**

Organization

- ▶ Relationship to organizational purpose and goals
- ▶ Niche
- ▶ Types of markets
 - ▶ Single
 - ▶ Multiple
 - ▶ Stratified
 - ▶ Primary
 - ▶ Secondary
 - ▶ Tertiary
 - ▶ Combination

Characteristics

In meeting the instructional needs of the markets served by your organization, several things must be known about both the individuals being served and the organization as a whole.

Individuals

- ▶ Specific need(s)
- ▶ Age
- ▶ Gender
- ▶ Ethnic background
- ▶ Educational history
- ▶ Prior work preparation
- ▶ Work experience
- ▶ Motivation

Organizations

- ▶ Specific need(s)
- ▶ Type of business
 - ▶ Manufacturing
 - ▶ Service
 - ▶ Retail
 - ▶ Wholesale
- ▶ Location
- ▶ Contact person
- ▶ Organizational structure
- ▶ Organizational culture
- ▶ Size of organization
- ▶ Special operations/requirements
- ▶ Number of employees/participants
- ▶ Types (stratification) of employees
- ▶ SIC (Standard Industrial Classification) code
- ▶ Motivation

Target Groups

- ▶ Corporate Personnel

- ▶ Management/administrative/
executive staff
- ▶ Sales staff
- ▶ Technical staff
- ▶ Individuals with basic education
needs
- ▶ Customers
- ▶ Community
- ▶ Other Groups
 - ▶ Apprentices
 - ▶ Private groups
 - ▶ Military personnel
 - ▶ Government personnel
 - ▶ Volunteers
 - ▶ Formal schooling
 - ▶ High school students
 - ▶ Community college students
 - ▶ University students
 - ▶ Other individuals (OJT, informal,
tutorial, one-on-one)

Marketing

- ▶ “Process” rather than “product”
- ▶ “Means” rather than “ends”
- ▶ What a business is all about
- ▶ All efforts on the part of the organization towards satisfying the needs of the customer
- ▶ Key to success of any organization

Marketing Process

1. Identify target market(s)
2. Analyze market needs
3. Research market potential
4. Create a product or service
5. Develop a distribution system
6. Price the product/service
7. Promote (advertise) the product/service
8. Sell product/service
9. Monitor product/service to insure customer's needs are being met

Six “P’s” of Marketing

- ▶ Products (deliverables)
 - ▶ Knowledge (cognitive) and/or
 - ▶ Attitudes (affective) and/or
 - ▶ Skills (motor)
 - ▶ Habits (psychomotor)
- ▶ Packaging
 - ▶ Programs
 - ▶ Courses
 - ▶ Seminars
 - ▶ Workshops
 - ▶ Distance learning
 - ▶ On-the-job training (OJT)
- ▶ Pricing
 - ▶ Budget-centered
 - ▶ Cost-centered
 - ▶ Profit-centered
- ▶ Promoting (advertising)
- ▶ Placing (location)
 - ▶ On-site
 - ▶ Off-site
 - ▶ Distance learning
- ▶ Profit

Objective #8

Concept of “Curriculum”

The “offerings” of an instructional organization. The *means* of delivering the requisite knowledge, attitudes, skills and habits to the market for purposes of employment.

The “packaging” of instruction. The courses, units, field trips, seminars, workshops, on-the-job training (OJT) and, so forth, that provide the necessary HPI to an individual in an occupation.

Instruction

That activity which effects change, or the reaffirmation of the *cognitive*, *affective* and *motor* behavior of individuals with regards to work-related performance and the formation or confirmation of acceptable work *habits*.

Types of Instruction

- ▶ Formal Instruction (structured, planned, organized, evaluated)
- ▶ Informal Instruction (no structured approach, unplanned, no systematic evaluation)
- ▶ Incidental Learning (trial and error, accidental)

Components of an Instructional Program

An analysis of the delivery of instruction reveals the following components:

- ▶ Students, learners
- ▶ Instructor
- ▶ Content
- ▶ Method

An assessment of each component should be made on a regular basis for purposes of improvement.

A = KASH needed
- B = KASH possessed
C = HPI needed

Identification of HPI Offerings

Strategic Alliance

An unwritten agreement between the individuals/organizations who deliver the instruction and the individuals/organizations receiving the HPI. The underlying assumption of the alliance is that the instruction will be delivered in an effective, efficient manner and that the instruction will be appropriate and timely.

Program Planning

Six questions should be asked in planning and scheduling the individual offerings of the curriculum:

- ▶ **WHAT** are you going to do?
- ▶ **WHEN** are you going to do it?
- ▶ **HOW** are you going to do it?
- ▶ **WHERE** are you going to do it?
- ▶ **WHO** are you going to do it to?

Central question “**WHY** are you going to do it?”

“Catalog” Entries

- ▶ Description of “deliverable”
- ▶ Prerequisites
- ▶ Credit hours vs continuing education units (CEU’s)
- ▶ Time/clock hours
- ▶ Cost

Equivalencies

- ▶ Credit hours vs clock hours
- ▶ Ratio: 1 sem hr = 15 clock hours
- ▶ Work experience credit
 - ▶ 2000 clock hours = 1 work year
 - ▶ Ratio of clock hours of work experience to academic credit
- ▶ Awarding of certificates on completion of courses/units

Objective #9

**Personnel Organization
Chart**

Organizational Algebra

Organizational results equals sum total of individual contributions

$$+A+B-C+D-E-F+G = \text{Organizational Results}$$

Notable quote: If you aren't pulling your load, you're pushing your luck.

Source: Main Event Management Corp.

Types of HPI Personnel

- ▶ **Administrative Personnel**
- ▶ **Instructional Personnel**
- ▶ **Support Personnel**

Administrative Personnel

- ▶ HPI Manager
- ▶ HPI Program Coordinator

HPI Manager

HPI managers plan, organize staff and control HPI operations/projects in conjunction with other units in the organization. They must be knowledgeable about and competent in the following areas.

- ▶ Delegation
- ▶ Return-on-Investment (ROI)
- ▶ Intellectual Versatility
- ▶ Large and Small Group Presentation Skills
- ▶ “People” Skills
- ▶ Organizational Understanding
- ▶ Futuring Skills
- ▶ Negotiation Skills
- ▶ HPI Field Understanding
- ▶ Knowledge of the Adult Learner
- ▶ Computer Competence
- ▶ Career Development Approaches

HPI Program Coordinator

Program coordinators ensure that facilities, equipment, materials and other aspects affecting the instructional situation are present and that the instruction being offered is presented in an effective and efficient manner. The program coordinator must be competent in the following areas:

- ▶ “Six Honest Serving Men”
 - ▶ Why?
 - ▶ Who?
 - ▶ Where?
 - ▶ What?
 - ▶ When?
 - ▶ How?
- ▶ “Program” materials planned, duplicated and distributed
- ▶ Contingency plans
- ▶ Follow-up

Instructional Personnel

Category I - HPI Professionals

Category II - Permanent employee in organization with temporary HPI assignment

Category III - Individuals within organization who assume some HPI responsibilities. May or may not be in conjunction with the HPI department.

Category IV - Consultants

- ▶ Internal Consultants
- ▶ External Consultants

Sources

- ▶ Internal Selection - Promotion from within the organization
- ▶ External Selection - Selection from outside the organization

Identification

Identifying people who **can** and **will** do the job.

Can = The ability to. . .

Will = Positive attitude, motivation,
good work ethic

Recruiting Process

The four steps in the recruiting process are:

1. Prepare position description
2. Advertise the opening
3. Screen applicants
 - ▶ Eliminate unqualified applicants
 - ▶ Rank remaining qualified applicants
 - ▶ Interview top applicants
4. **SELL** selected candidate

Objective #10

Interview Process

Four basis for questions during the interview process:

1. **Person** - What goals, ambitions, strengths, weaknesses
2. **Organization** - Fit to organizational style, structure
3. **HPI and Work Experience** - Preparation and past and current employment
4. **Compensation** - \$\$\$\$\$\$\$\$\$\$\$\$\$\$

During the interview, repeat the process twice. Look for consistencies, inconsistencies, confirmation, etc.

Interview Questions

- ▶ Appropriateness or inappropriateness of questions
 - ▶ “Intent” or “unknown motive” the issue, not the questions themselves
 - ▶ Questions concerning:
 - ▶ Age
 - ▶ Race/color
 - ▶ Disability
 - ▶ Gender
 - ▶ National origin
 - ▶ Religion
- ▶ Relevant Legislation
 - ▶ Equal Employment Opportunity Commission (EEOC)
 - ▶ Age Discrimination Employment Act (ADEA)

Objective #11

Floorplan

Considerations

When designing/choosing HPI facilities, consider the following:

- ▶ Form follows function
- ▶ Outside in (perimeter established)
- ▶ Inside out (perimeter created)
- ▶ Aesthetics
 - ▶ Environment
 - ▶ Furnishings
 - ▶ Lighting
- ▶ Clients
 - ▶ Size and location of target population
 - ▶ Demographic characteristics
 - ▶ Age ranges
 - ▶ Educational attainment
 - ▶ Work experience
 - ▶ Cultural background
 - ▶ Disabilities, learning motivation, subject matter content

- ▶ Facilities
 - ▶ Traditional facilities
 - ▶ Sophisticated classrooms/
laboratories
 - ▶ Unique equipment
 - ▶ Complex learning methodologies
- ▶ Accommodations
 - ▶ Transportation
 - ▶ Food
 - ▶ Housing
- ▶ Instructional Technology
 - ▶ Computer-assisted instruction (CAI)
 - ▶ Teleconferencing
 - ▶ Color video/videodisc equipment
 - ▶ Electronic blackboards
 - ▶ Front and rear projection screens
- ▶ Reference Materials

Types of Facilities

- ▶ Centralized vs Decentralized
- ▶ Dedicated vs Nondedicated
 - ▶ “Owned” vs shared
 - ▶ Dedicated - HPI designed and managed
 - ▶ Advantages - Company owned/managed, proximity, cost, convenience
 - ▶ Disadvantages - Overhead, management, security, upkeep
 - ▶ Nondedicated - Not specifically HPI facility. Shared with others in organization
 - ▶ Advantages - Esprit de corps, get away from phone, no overhead, JIT
 - ▶ Disadvantages - No control, difficulty in scheduling, not tailored

Function

- ▶ **Administrative Facilities**
 - ▶ Location, size, arrangement
 - ▶ Types of office furnishings/ equipment
- ▶ **Staff/Work Space Requirements**
 - ▶ Planning
 - ▶ Instruction
 - ▶ Instructional support
 - ▶ Meetings, conferences
 - ▶ Individual conferences
- ▶ **Classroom/Laboratory Facilities**
 - ▶ Adequate participant room
 - ▶ Mobile seating arrangements
 - ▶ Moveable worktable arrangements
 - ▶ Potential for variety of applications
 - ▶ Height of ceiling
 - ▶ Light control/location
 - ▶ Breakout rooms/soundproof room dividers
 - ▶ Provisions for concurrent learning
 - ▶ Chalkboard/display boards
 - ▶ Still/film projection facilities
 - ▶ CCTV

- ▶ Front/rear screen projection
- ▶ Secure projection booth
- ▶ Secure equipment storage area
- ▶ Auditorium/Large Meeting Facility
- ▶ Raised platform
- ▶ Tiered seating
- ▶ Front/rear screen projection screens
- ▶ Sound system
- ▶ Cordless voice enhancement system
- ▶ Layered levels of lighting
 - ▶ Full lighting
 - ▶ Subdued lighting
 - ▶ Room area lighting (front/rear)
 - ▶ Front/middle/back lighting controls
- ▶ Ancillary Facilities
 - ▶ Restrooms
 - ▶ Closets
 - ▶ Kitchenette
 - ▶ Storage

Facilities Development Team

- ▶ Architect
- ▶ Users
- ▶ Outside Planning Resources
 - ▶ Facilities Planners
 - ▶ Human Factor Engineers
 - ▶ Media Specialists
 - ▶ Lighting Consultants
 - ▶ Interior Designers
 - ▶ Purchasing Consultants

Preliminary Design Phase

- ▶ Master planning questionnaire
- ▶ “Bubble diagrams”
 - ▶ Sorting information
 - ▶ Define relationship of components of facility
 - ▶ Components drawn proportionately
- ▶ Preliminary design floor plan

Masterplanning Questionnaire

Person interviewed:

Date:

Current facility use:

Trends:

Current problems:

Future programs/activities:

Space:

Describe current space deficiencies/additional space desired.

Improvements:

Describe improvements you would most like to see accomplished. Give order of priority and desired time frame.

Additional comments:

Objective #12

Space-use Inventory Form

Floorplan

Objective #13

Order Form

Space-use Inventory Form

Floorplan

Objective #14

Time Elements

- ▶ **Calendar Year**
- ▶ **Fiscal Year**
- ▶ **Business Cycle**

Financial Management

- ▶ Budget-centered
- ▶ Cost-centered
- ▶ Profit-centered
- ▶ Combination

Objective #15

Curriculum

The “offerings” of an HPI organization. The *means*, that is, programs, courses, units, learning objectives, seminars, workshops, etc., of positively affecting an individual’s performance in the workplace.

Kirkpatrick's Assessment Model

▶ **Level 1 - Reaction**

“Reaction” measures levels of satisfaction among participants to the HPI program; e.g., learning experience, method of delivery, instructor performance, learning environment, attainment of objectives, etc.

▶ **Level 2 - Learning**

“Learning” measures degree to which the HPI mastered by participants. Includes both the cognitive and performance aspects of the learning that has occurred.

▶ **Level 3 - Behavior**

“Behavior” measures degree to which skills acquired during HPI are applied on-the-job following HPI.

▶ **Level 4 - Results**

“Results” is a measure of the effect of HPI on organization's overall financial well-being, i.e. “bottom line.”

Phillips' Assessment Model

- ▶ **Level 1 - Reaction and Planned Action**
“Reaction” measures levels of satisfaction among participants to HPI. Like Kirkpatrick, learning experience, method of delivery, instructor performance, learning environment, attainment of objectives, etc.
“Planned action” is participants’ response to how what they learned in HPI can be applied to improve performance on the job.
- ▶ **Level 2 - Learning**
“Learning” measures degree to which HPI mastered by participants. Includes both cognitive and performance aspects of learning that has occurred.
- ▶ **Level 3 - Behavior**
“Behavior” measures degree to which skills acquired during HPI are applied on-the-job following HPI.

▶ **Level 4 - Results**

“Results” is a measure of effect of HPI on organization’s overall financial well-being, i.e., “bottom line.”

▶ **Level 5 - Return on Investment (ROI)**

An *mathematical formula* to calculate the dollar value of HPI to an organization; the amount of money *gained* or *lost* by the organization who sponsored the HPI. The benefits of HPI, less the cost of HPI, over the cost of HPI x 100.

Comparison of Kirkpatrick's and Phillips Assessment Models

Levels 1-3

- ▶ Individual performance oriented
- ▶ Formative
- ▶ Level 1 - Measure of *perceptions, values, attitudes* (affective)
- ▶ Level 2 - Measure of *knowledge* (cognitive)
- ▶ Level 3 - Measure of *performance* (motor)

Levels 4-5

- ▶ Organization-oriented
- ▶ Summative
- ▶ Basis for making decisions regarding continuance of HPI
- ▶ Level 4 - Measure of *benefits* to organization (Kirkpatrick & Phillips)
- ▶ Level 5 - Mathematical analysis of value of HPI to organization (Phillips)
 - ▶ Return-on-Investment (ROI)

ROI Formula

The formula for computing the return-on-investment (ROI) percentage of HPI is:

$$\text{ROI} = \frac{\text{Benefits of HPI} - \text{HPI Costs}}{\text{HPI Costs}} \times 100 = \frac{\$ \text{Net benefits} / \$ \text{Spent}^*}{\text{HPI Costs}} \times 100 =$$

*The percentage that results is a “plus” or “minus” effect of HPI to the organization *above* and *beyond* the original investment.

Objective #16

Types of Planning

- ▶ Operational - Present
- ▶ Tactical - Intermediate
(3-5 years)
- ▶ Strategic - Long range
(5-10 years)

Components of a Strategic Plan

- ▶ **Organizational Philosophy and Mission**
- ▶ **Organizational Environment**
- ▶ **Organizational Strengths, Weaknesses, Opportunities and Threats**
- ▶ **Strategic Objectives**
- ▶ **Alternative Strategies**
- ▶ **Evaluation and Selection of Strategies**