



PRESENTATIONS GUIDES

WED 469 - Training Systems
Management

Fall 2008

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Presentation Guide

Orientation

WED 469

Visuals

- A. Name and title of course

- B. Administrative Considerations
 - 1. Roll/name tents
 - 2. Location of class meetings
 - 3. Days of meetings/holidays
 - 4. Timekeeper
 - 5. Student information cards
 - 6. Course product/appearance/
academic portfolio/resume

- C. Class Introductions

- D. Learner's and Instructor's Guide
 - 1. Organization
 - a. Syllabus
 - b. Organization Development Plan
 - 1) Title page
 - 2) Table of Contents
 - 3) Foreword

 - c. Assignment sheets

- 1) Delivery Schedule
 - 2) Dates
 - 3) Reading assignments completed **before** coming to class
 - 4) Discussion topics parallel objectives
3. Organization of “Unit”
- a. Introduction - Unit Two
 - b. RPO/LOLA
 - c. LOLA #3
 - 1) Learning objective
 - 2) Learning activities
 - a) Reading assignments
 - b) Illustrated Presentation-discussion
 - c) Assignment
 - (1) Written assignment-
last learning activity
 - (2) **Bold print**
 - (3) Corresponds with
entries in syllabus
and course product

E. Course Reserve

3

1. Process

F. Miscellaneous

1. Try doesn't count

2. “Monkey business”
3. Starkweather
4. Retention curve
5. Award what is earned
6. 90% don't come by
7. It is a business

G. Review readings for Objective #1

Presentation Guide

Unit One - Human Resource Development

Visuals

Objective #1 - Review the Role and Function of Human Resource Development (HRD)

A. Review LOLA

B. Organizational Resources

1.1

1. Human Resources
 - a) People
2. Financial Resources
 - a) Money/securities
3. Capital Resources
 - a) Equipment
 - b) Tools
 - c) Facilities

C. Human Resources

1. Definition

1.2

2. Functions

1.3

a. Human Resource Development (HRD)

1) HPI

2) Organizational Development

3) Career Development

- b. Human Resources Management (HRM)
 - 1) Recruitment
 - 2) Selection
 - 3) Placement
 - 4) Appraisal
 - 5) Compensation
 - 6) Workforce Planning
- c. Human Resources Environment (HRE)
 - 1) Job Enrichment
 - 2) Job Enlargement
 - 3) Organizational Development
- 3. Human Resource Development (HRD)
 - a. Definition **1.4**
 - b. HPI **1.5**
 - 1) Definition
 - a) “KASH”
 - 2) Types of HPI **1.6**
 - 3) Benefits **1.7**
 - a) Increased productivity
 - b) Improved quality of product
 - c) Innovation
 - d) Fulfillment
 - e) Readiness for change
 - 4) HPI Organizations **1.8**

D. Workforce Profiles	
1. Economy	1.9
2. Demographics	1.10
3. Challenges	1.11
E. Course Terminology	1.12
1. Organization-department-company	
2. “Learning” vs “instructional” organization	
3. “Deliverable”/Instruction/KASH	
4. Roles	1.13
F. Review readings for Objective #2	

Presentation Guide

Unit Two - Planning and Organization

Visuals

Objective #2 - Write an Organizational Mission

A. Review RPO/LOLA

B. Mission

- | | |
|---|------------|
| 1. Definition | 2.1 |
| 2. Embodied Characteristics | 2.2 |
| a. Distinctive values | |
| b. Competitive domain | |
| 1) Industry scope | |
| 2) Market segment scope | |
| 3) Geographic scope | |
| c. Motivating | |
| d. Vision, direction | |
| e. Long term (10-20 years) | |
| 3. Influences | 2.3 |
| a. Five elements shape an organizational mission | |
| 1) History | |
| 2) Current preferences | |
| 3) Environmental factors | |
| 4) Resources | |
| 5) Distinctive competencies | |
| 4. Components | 2.4 |
| a. Purpose | |
| b. Goals | |

c. Market Statement

C. Purpose

1. Human Systems
 - a. Components
 - 1) System
 - 2) Suprasystem
 - 3) Subsystems
 - b. Relationship of system components
 - c. System-input/output **2.5**
2. Characteristics of a Purpose **2.6**
3. Components **2.7**
 - a. Organization/unit/department
 - b. Service word
 - c. Market(s) to be served
 - d. "Deliverables"
4. Sample purpose statements **2.8**

D. Goals

1. Definition **2.9**
2. Relationship of **organizational goals** to market/clientele
3. Gives direction to organization
4. Sample goal statements **2.12-13**

- E. Market/Clientele **2.14**
1. Answer to the question “*who* is to be served?”
 2. “Niche”
 3. Relationship to organizational purpose and goals
 4. Markets/Clientele **2.15**
- F. Vision (optional)
1. “Dream”
 2. Location in final project
- G. Review readings for Objective #3

Presentation Guide

Unit Two - Planning and Organization

Visuals

Objective #3 - Name the Instructional Organization

A. Review RPO/LOLA

B. Name

1. Representative vs global
 - a. “What’s in a name?”
2. Types of titles
 - a. Definitive title
 - b. Acronyms
 - c. Sequence of letters
3. Contrasting titles
 - a. “Training Department”
 - b. “Knowledge and Performance Solutions”
 - c. “Helix Knowledge”
 - d. “Human Performance Improvement”

C. Review readings for Objective #4

Presentation Guide

Unit Two - Planning and Organization

Visuals

Objective #4 - Create an Organizational Logo

A. Review RPO/LOLA

B. Logo

1. Representative of the organization
2. Representative vs global
3. Representative vs esoteric
 - a. SIU
 - b. Nike “Swoosh”
 - c. Eric’s “Helix”
4. Shape
5. Size
6. Color
7. Location
 - a. Organizational Materials
 - 1) Advertisements, clothing
 - 2) Letterhead, envelopes
 - 3) Business cards
 - 4) Clothing

C. Computer Programs (Logos)

1. Microsoft Publisher
2. Campus computer laboratories
 - a. Wren Hall
 - b. Faner Hall

D. Review readings for Objective #5

Presentation Guide

Unit Two - Planning and Organization

Visuals

Objective #5 - Draw a Functional Organization Chart

A. Review RPO/LOLA

B. “Creating an Organization”

Video

C. Types of Instructional Organizations

5.1

- a. Type I - Internal
- b. Type II - Few outside customers
- c. Type III - Some outside customers
- b. Type IV - Autonomous

D. Types I and IV

- a. Type I - Internal **5.2**
 - 1) In-house
 - 2) One extreme of continuum
 - 3) Market/clientele
- b. Type IV - Autonomous
 - 1) Autonomous from parent organization
 - 2) Other end of continuum
 - 3) Client’s needs

- 4) Types of markets
 - a) Individual consumers
 - b) Private sector organizations
 - c) Government
 - d) Military

E. Terminology

1. Line-staff
2. Line of authority
3. Reporting line
4. Chain of command
5. Responsibility/Authority
 - a. Can delegate authority, not responsibility

F. Examples - Functional Organization Charts **5.3**

1. Styles of organization charts **5.4**

G. Review readings for Objective #6

Presentation Guide

Unit Three - Marketing

Visuals

Objective #6 - Prepare a Learning Needs Analysis

A. Review RPO/LOLA

B. Define learning need

1. Answers the question “*what are the learning needs of the market you want to serve?*”

6.1

C. Define KASH

6.2

D. Optimals-Actuals=Needs

6.3

1. Optimals - KASH needed by employee to satisfactorily perform the occupation
2. Actuals - KASH currently possessed by employee
3. Needs - KASH difference between optimals and actuals define a learning need

E. Needs assessment-needs analysis

6.4

1. Needs assessment
 - a. Informal

- 1) “Just being around”
- 2) Day-to-day observation
- b. Formal
 - 1) “SOFT” Study
- 2. Needs analysis
 - a. Needs analysis process **6.5-7**
- G. Needs analysis checklist **6.8**
- H. Critical competencies of a needs analyst **6.9**
- I. Review readings for Objective #7

Presentation Guide
Unit Three - Marketing

Visuals

Objective #7 - Prepare a Marketing Plan

A. Review RPO/LOLA

B. Major Question

7.1

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

C. Definition of Market

7.2

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

D. Types

7.3

E. Organization

7.4

1. Niche

2. Types

a. Single

b. Multiple

c. Stratified

- 1) Primary
- 2) Secondary
- 3) Tertiary

F. Characteristics **7.5-6**

G. Target Groups **7.7**

1. Corporate personnel
 - a. Management/administrative/
executive staff
 - b. Sales staff
 - c. Technical staff
 - d. Individuals with basic education
needs
 - e. Customers
 - f. Community
2. Other groups
 - a. Apprentices
 - b. Private groups
 - c. Military personnel
 - d. Government personnel
 - e. Volunteers
 - f. Formal schooling
 - 1) High school students
 - 2) Community college students
 - 3) University students
 - g. Other individuals (OJT, informal, tutorial,

one-on-one)

H. “Marketing Concepts”

Video

I. Marketing

7.8

1. Process rather than product
2. Means rather than ends
3. What a business is all about
4. All efforts towards satisfying the customer’s needs
5. Key to success of any organization

J. Marketing Process

7.9

1. Identify target market(s)
2. Analyze market needs
3. Research potential of market(s)
4. Create a product or service
5. Develop a distribution system
6. Price the product/service
7. Promote (advertize) product/service
8. Sell product/service
9. Monitor product/service to insure same is meeting customer’s needs
10. Maintenance/service/repair of product

K. Six “P’s” of Marketing

7.10

1. Products (“deliverables”)

- a. Knowledge (cognitive) and/or
 - b. Attitudes (affective) and/or
 - c. Skills (motor)
 - d. Habits (psychomotor)
2. Packaging
- a. Programs
 - b. Courses
 - c. Seminars
 - d. Workshops
 - e. Distance learning
 - f. On-the-job training (OJT)
3. Pricing
- a. Budget-centered
 - b. Cost-centered
 - c. Profit-centered
4. Promoting (advertising)
5. Placing (location)
- a. On-site
 - b. Off-site
 - c. Distance learning
6. Profit

L. Review readings for Objective #8

Presentation Guide
Unit Four - Programming

Visuals

Objective #8 - Prepare a List of Curricular Offerings

A. Review RPO/LOLA

B. “Blackbox” Theory

Drawing

1. Synonyms

- a. “Blackbox”
- b. Treatment
- c. Change agent
 - 1) David Williams
- d. Behavior modification unit
- e. Performance improvement element
- f. Curriculum in its various forms
- g. “Means”
- h. Learningplace
- i. Curriculum of an “instructional organization”

2. Components

- a. “Blackbox”
 - 1) “Entrance”/“Exit”
- b. “Student”

- 1) Adult learner
- 2) “KASH” formula
- c. Prerequisites
- d. “Graduate”
 - 1) “KASH +”
 - 2) “+” / “ends”/HPI
- 3. ROI/“HPI transfer”
 - a. Retrospect of HPI from the workplace

C. “Curriculum” a Response to Market Needs

- 1. Concept of “curriculum” **8.1**
- 2. Instruction - that activity which **8.2**
effects change or the reaffirmation of the *cognitive, affective* and *motor* behavior of individuals with regard to work-related performance and the formation or confirmation of acceptable work *habits*
- 3. Types of Instruction **8.3**
 - a. Formal (structured, planned, organized, evaluated)
 - b. Informal (no structured approach, unplanned, no systematic evaluation)
 - c. Incidental learning (accident, trial and error)

D. Components/Instructional Offering	8.4
1. Trainees, students, learners	
2. Trainer, instructor	
3. Content	
4. Method	
5. “Can-string” analogy	
E. KASH Arithmetic	8.5
F. Identification of Offerings	8.6
G. Strategic Alliance	8.7
1. Unwritten agreement between individuals/organizations and market(s)	
H. “Program” Planning	
1. Six questions	8.8
a. Poem by Rudyard Kipling	Guide
2. Elements of a Catalog Entry	8.9
a. Description of “deliverable”	
b. Prerequisites	
c. Credit hours vs continuing education units (CEUs)	
d. Time/clock hours	
e. Costs	

- f. Location
- g. “Course product”
- 3. Equivalences **8.10**
 - a. Credit hours ~ clock hours
 - 1. Ratio: 1 sem hr = 15 clock hours
 - b. Work experience credit
 - 1) 2000 clock hours = 1 work year
 - 2) Ratio of clock hours of work experience to academic credit
 - c. Certificates
 - 1) Clock hours/credit hours

I. Review programming materials/
literature (small group activity)

J. Review readings for Objective #9

Presentation Guide
Unit Five - Staffing

Visuals

Objective #9 - Draw a Personnel

Organization Chart

A. Review RPO/LOLA

B. Personnel Organization Chart **9.1**

1. Relationship of personnel to organizational mission, needs, programming, etc.
2. Relationship to “functional organization chart”
3. Addition of occupational titles/individual’s names

C. Organizational Algebra **9.2**

D. Types of HPI Personnel **9.3**

1. “Performance Improvement Organizations with Administrative/Manager Titles”

2. Administrative Personnel **9.4**

a. HPI Manager **9.5**

- 1) Responsible for all aspects of organization

b. HPI Program Coordinator **9.6**

- 1) Responsible for all aspects of coordinating the delivery of the KASH of the organization to its market(s)

3. Instructional Personnel **9.7**
 - a. Category I
 - b. Category II
 - c. Category III
 - d. Category IV
4. Support Staff
 - a. Curriculum designers
 - b. Evaluation personnel
 - c. Clerical/secretarial

E. Computer Programs/Organization Charts

1. VISIO
2. Power Point

F. Position descriptions

1. Relationship to “personnel organization chart”
2. Relationship to occupational analysis and task listing sheet
3. Narrative statement

4. “Performance” rather than
“knowledge”

G. Hiring HPI Staff

- | | |
|-----------------------|-------------|
| 1. Sources | 9.8 |
| 2. Identification | 9.9 |
| 3. Recruiting process | 9.10 |
- Squares**

H. Review readings for Objective #10

Presentation Guide
Unit Five - Staffing

Visuals

Objective #10 - Prepare an Interview
Questionnaire

A. Review RPO/LOLA

B. Staffing problem (small group exercise)

1. Report of results
2. Questions
 - a. How did your group approach the staffing problem?
 - b. Were there individuals who did not “fit” some or all of the job descriptions?
 - c. For the “instructor” position, did you assume that if the person could “do it”, they can “teach it?”
 - d. Do you think that this is a good step in the process of evaluating individuals for a position?
 - e. What now follows resume review process?

C. Interviewing

- 1. Process **10.1**
- 2. Interview Questions **10.2**
 - a. Appropriateness/inappropriateness of question
 - b. “Intent” or “unknown motive”
the issue, not the questions themselves
 - c. Questions concerning:
 - 1) Age
 - 2) Race/color
 - 3) Disability
 - 4) Gender
 - 5) National origin
 - 6) Religion
- 3. Legislation
 - a. Equal Employment Opportunity Commission (EEOC)
 - b. Age Discrimination Employment Act (ADEA)

D. Review readings for Objective #11

Presentation Guide

Unit Six - Facilities Planning and Management

Visuals

Objective #11 - Prepare a Preliminary Design Floorplan

A. Review RPO/LOLA

B. Sample Floorplan

11.1

C. Considerations

11.2-3

D. Types of Facilities

11.4

1. Centralized vs decentralized
2. Dedicated vs nondedicated
3. Internal vs external

E. Function

11.5-6

1. Administrative facilities
2. Staff/workspace requirements
 - a. Office space
 - b. Live workspace
 - c. Storage
3. Classroom/laboratory facilities
 - a. Multi-purpose classrooms/labs

- b. Single-purpose classrooms/labs
 - c. Auditorium/large meeting facility
 - 4. Ancillary facilities
 - a. Restrooms
 - b. Closets
 - c. Kitchenette
 - d. Storage
 - e. Parking

- F. Facilities Development Team **11.7**

- G. Preliminary Design Phase **11.8**
 - 1. Master planning questionnaire **11.9**
 - 2. “Bubble diagrams”
 - a. Sorting information
 - b. Define relationship of components of facility
 - c. Components drawn proportionately
 - 3. Preliminary design floor plan

- H. Master Planning Questionnaire

- I. Other Considerations
 - 1. Americans With Disabilities Act (ADA)
 - 2. Architectural Graphic Standards

3. Zoning

J. Anatomical Sizes

1. Height
2. Stride
3. Length of foot
4. Reach (height)
5. Reach (span)
6. Span (hand)
7. Elbow-fingertip

**Tapes/
folding
ruler**

K. Tools/Equipment

1. Traditional drafting equipment
2. Computer/drafting programs

L. Review readings for Objective #12

Presentation Guide

Unit Six - Facilities Planning
and Management

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

A. Review RPO/LOLA

B. Space-Use Inventory Form

12.1

1. Components

2. Content details

3. Sample copy/blank form

C. Relationship of Space-Use Inventory Form to floorplan (Objective #11)

12.2

D. Review readings for Objective #13

Presentation Guide
Unit Six - Facilities Planning
and Management

Visuals

Objective #13 - Prepare an Equipment-Supplies Order Form

A. Review RPO/LOLA

B. Equipment-Supplies Order Form

13.1

1. Purpose

2. Components

3. Content details

C. Relationship of equipment-supplies order form to floorplan and space-use inventory form (Objectives #11-12)

13.2-3

D. Review readings for Objective #14

Presentation Guide
Unit Seven - Financing and
Budgeting

Visuals

Objective #14 - Prepare a First-year
Operating Budget

A. Review RPO/LOLA

B. Time Elements

14.1

1. Calendar year
2. Fiscal year
3. Business cycle

C. Accounting Systems

1. Cash system
2. Accrual system
3. Records
 - a. Accounts payable
 - b. Accounts receivable

D. Depreciation

E. Locus of Control

1. Centralized accounting system
2. Decentralized accounting system

F. Financial Management Practices

14.2

1. Budget-centered
2. Cost-centered
3. Profit-centered
4. Combination

G. Types of Budgets

1. Line item
2. Program
3. Zero-based

H. Review readings for Objective #15

Presentation Guide

Unit Eight - Program Evaluation

Visuals

Objective #15 - Prepare a “Program” Assessment Instrument

A. Review RPO/LOLA

B. Concept of Program (review)

15.1

C. Review of Models

1. Kirkpatrick

15.2

a. Level 1 - Reaction

1) Attitudinal measure

2) Perceptions/opinions

b. Level 2 - Learning

1) Knowledge/performance
testing

2) “Psychomotor”

c. Level 3 - Behavior

1) “Training transfer”

2) Measurement of PIA acquired
in learningplace to application
in workplace

d. Level 4 - Results

- 1) “Benefits” of PIA to the organization
 - a) Increased productivity
 - b) Scrap reduction
 - c) Injury/fatality reduction
 - d) Decrease in absenteeism

2. Phillips **15.3-4**

- a. Level 1 - Reaction and Planned Action
 - 1) Same plus how HPI could be used to improve the workplace
- b. Level 2 - Knowledge/performance (same)
- c. Level 3 - Training transfer (same)
- d. Level 4 - Benefits (same)
- e. Level 5 - Return-on-Investment (ROI) formula
 - 1) Major contribution of Phillips
 - 2) Dollar-value analysis of HPI to the organization

D. Comparison of Models **15.5**

1. Levels 1- 2
 - a. Oriented toward *individual* performance
 - b. Formative
 - c. Level 1 - Measure of affective behavior plus “planned action”

(Phillips)

d. Level 2 - Measure of *knowledge/ performance*

2. Levels 3-5

a. *Organization-oriented*

b. Summative

c. Provides basis for making decisions regarding continuance of PIA

d. Level 3 - Training transfer

e. Level 4 - Measure of PIA *benefits* to organization (Kirkpatrick & Phillips)

f. Level 5 - “Dollar value” analysis of benefits of PIA to organization (Phillips)

1) ROI formula

15.6

a) Benefits

b) Costs of HPI

(1) Delivery

(2) Development

2) “\$ value” or % of ROI

E. Review readings for Objective #16

Presentation Guide

Unit Nine - Strategic Planning

VisualsObjective #16 - Prepare a Strategic Plan Outline

A. Review RPO/LOLA

B. Types of Planning

16.1

1. Operational (current situation, present)
2. Tactical (intermediate range, 3-5 years)
3. Strategic (long-range, 5-10 years)

C. Initial planning and organization vs strategic planning

D. Components of a Strategic Plan

16.2

Presentation Guide

Unit Ten - Workplace Legislation

- A. Americans with Disabilities Act (ADA)
- B. Occupational Safety and Health Act (OSHA)
- C. ISO 9000 - International Standards
- D. EEOC/Civil Rights Act of 1991
- E. Workforce Investment Act
- F. Carl D. Perkins Vocational
- G. Education and Applied Technology Education Act
- H. Welfare to Work (part of the welfare legislation)
- I. Local building codes

Presentation Guide

Closure

- A. Preparation of Organizational Development Plan

1. Cover
2. Binding
3. Sections/headers
4. Pagination
5. Copyright
 - a. Copyright statement
 - 1) Content
 - 2) Placement
 - b. Common law/Statutory
6. Orientation of figures on page
 - a. Portrait (left edge bound)
 - b. Landscape (“top” edge bound)

B. Review for Final Examination

C. Instructor-Course Evaluation