



Human Resource Development

TALENT DEVELOPMENT

8e

Jon M. Werner

Human Resource Development

TALENT DEVELOPMENT

EIGHTH EDITION

Jon M. Werner



Australia • Brazil • Canada • Mexico • Singapore • United Kingdom • United States

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For Barbara

*“Pass on what you heard from me ... to reliable leaders who are competent
to teach others.” (II Timothy 2:2; The Message translation)*

With special thanks to

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for his invaluable contributions to earlier editions.

Brief Contents

Preface *xix*

PART 1 FOUNDATIONS OF HUMAN RESOURCE DEVELOPMENT 1

- 1** INTRODUCTION TO HUMAN RESOURCE DEVELOPMENT 3
- 2** INFLUENCES ON EMPLOYEE BEHAVIOR 33
- 3** LEARNING AND HRD 65

PART 2 FRAMEWORK FOR HUMAN RESOURCE DEVELOPMENT 103

- 4** ASSESSING WORKPLACE LEARNING NEEDS 105
- 5** DESIGNING WORKPLACE LEARNING INTERVENTIONS 139
- 6** IMPLEMENTING WORKPLACE LEARNING INTERVENTIONS 167
- 7** EVALUATING WORKPLACE LEARNING INTERVENTIONS 205

PART 3 HUMAN RESOURCE DEVELOPMENT APPLICATIONS 251

- 8** ONBOARDING: EMPLOYEE SOCIALIZATION AND ORIENTATION 253
- 9** SKILLS AND TECHNICAL TRAINING 287
- 10** COACHING AND PERFORMANCE MANAGEMENT 319
- 11** EMPLOYEE COUNSELING, WELL-BEING, AND WELLNESS 359
- 12** CAREER MANAGEMENT AND DEVELOPMENT 401
- 13** MANAGEMENT DEVELOPMENT 455
- 14** ORGANIZATION DEVELOPMENT AND CHANGE 497
- 15** HRD, DIVERSITY AND INCLUSION: BEYOND DIVERSITY TRAINING 543

Glossary 578

Index 594

Contents

Preface *xix*

PART 1 FOUNDATIONS OF HUMAN RESOURCE DEVELOPMENT 1

1 INTRODUCTION TO HUMAN RESOURCE DEVELOPMENT 3

INTRODUCTION 4

THE PROGRESSION TOWARD A FIELD OF HUMAN RESOURCE DEVELOPMENT 5

 Early Apprenticeship Training Programs 5

 Early Vocational Education Programs 6

 Early Factory Schools 6

 Early Training Programs for Semiskilled and Unskilled Workers 6

 The Human Relations Movement 7

 The Establishment of the Training Profession 7

 Emergence of Human Resource Development 8

THE RELATIONSHIP BETWEEN HUMAN RESOURCE MANAGEMENT AND HRD/TRAINING 8

 Line versus Staff Authority 9

HUMAN RESOURCE DEVELOPMENT FUNCTIONS 10

 Training and Development (T&D) 10

 Career Development 10

 Organization Development 11

 The ATD Learning and Performance Wheel 11

 Strategic Management and HRD 11

 The Supervisor's Role in HRD 13

 Organizational Structure of the HRD Function 14

ROLES AND COMPETENCIES OF AN HRD PROFESSIONAL	15
The HRD Executive/Manager	15
Other HRD Roles and Outputs for HRD Professionals	16
Certification and Education for HRD Professionals	16
CHALLENGES TO ORGANIZATIONS AND TO HRD PROFESSIONALS	18
Competing in a Turbulent Global Economy	19
Addressing the Skills Gap	19
Addressing Workforce Diversity and Inclusion	19
The Need for Lifelong Learning	19
Facilitating Organizational Learning	20
Addressing Ethical Dilemmas	20
A FRAMEWORK FOR THE HRD PROCESS	21
Needs Assessment Phase	21
Design Phase	22
Implementation Phase	23
Evaluation Phase	23
ORGANIZATION OF THE TEXT	24
SUMMARY	26
QUESTIONS FOR DISCUSSION	26
EXERCISE: INTERVIEW AN HRD PROFESSIONAL	27
NOTES	27
2 INFLUENCES ON EMPLOYEE BEHAVIOR	33
INTRODUCTION	33
MODEL OF EMPLOYEE BEHAVIOR	34
Major Categories of Employee Behavior	34
EXTERNAL INFLUENCES ON EMPLOYEE BEHAVIOR	35
Factors in the External Environment	35
Factors in the Work Environment	36
MOTIVATION: A FUNDAMENTAL INTERNAL INFLUENCE ON EMPLOYEE BEHAVIOR	41
Need-Based Theories of Motivation	42
Cognitive Process Theories of Motivation	42
Reinforcement Theory: A Noncognitive Theory of Motivation	47
Summary of Motivation	48
OTHER INTERNAL FACTORS THAT INFLUENCE EMPLOYEE BEHAVIOR	50
Attitudes	51

Knowledge, Skills, and Abilities	52
SUMMARY	53
QUESTIONS FOR DISCUSSION	53
EXERCISE 1: INCREASING EMPLOYEE MOTIVATION	54
EXERCISE 2: MOTIVATION THEORIES AND YOU	55
NOTES	55

3 LEARNING AND HRD 65

INTRODUCTION	66
LEARNING AND INSTRUCTION	66
In Search of Basic Learning Principles	67
Limits of Learning Principles in Improving Training Design	68
The Impact of Instructional and Cognitive Psychology on Learning Research	68
MAXIMIZING LEARNING	69
Trainee Characteristics	69
Training Design	72
Retention of What Is Learned	75
Transfer of Training	75
AN EXPANDED FOCUS ON INFORMAL LEARNING	78
INDIVIDUAL DIFFERENCES IN THE LEARNING PROCESS	79
Rate of Progress	79
Training Adult and Older Workers	80
LEARNING STYLES AND STRATEGIES	82
Kolb's Learning Styles	82
Perceptual Preferences	84
Learning Strategies	85
FURTHER CONTRIBUTIONS FROM INSTRUCTIONAL AND COGNITIVE PSYCHOLOGY	85
The ACT* Approach to Learning Procedural Skills	86
Learning to Regulate One's Own Behavior	86
Expert and Exceptional Performance	86
Gagné's Theory of Instruction	88
SUMMARY	89
QUESTIONS FOR DISCUSSION	90
EXERCISE 1: A REFLECTIVE LEARNING JOURNAL	91
EXERCISE 2: VARK QUESTIONNAIRE	91
NOTES	92

PART 2 FRAMEWORK FOR HUMAN RESOURCE DEVELOPMENT 103**4 ASSESSING WORKPLACE LEARNING NEEDS 105****INTRODUCTION 106**

Definition and Purposes of Needs Assessment 106

What Is a Training or Workplace Learning Need? 108

Levels of Needs Analysis 109

STRATEGIC/ORGANIZATIONAL ANALYSIS 110

Components of a Strategic/Organizational Needs Analysis 110

Advantages of Conducting a Strategic/Organizational Analysis 111

Methods of Strategic/Organizational Analysis 112

TASK ANALYSIS 114

The Task Analysis Process 115

A Task Analysis Example at Texas Instruments 118

Task Analysis at Boeing 119

Summary of Task Analysis 119

PERSON ANALYSIS 120

Components of Person Analysis 122

Performance Appraisal in the Person Analysis Process 122

Developmental Needs 124

The Employee as a Source of Needs Assessment Information 125

The Benchmarks Specialized Person Analysis Instrument 125

COMPETENCY MODELING 126**PRIORITIZING HRD NEEDS 126**

Participation in the Prioritization Process 126

The Workplace Learning Advisory Committee 126

THE HRD PROCESS MODEL DEBATE 127

How Technology Changes Needs Assessment 128

SUMMARY 129**QUESTIONS FOR DISCUSSION 129****EXERCISE: CONDUCTING A TASK ANALYSIS 130****INTEGRATIVE CASE: CATHAY PACIFIC AIRWAYS 130****NOTES 131****5 DESIGNING WORKPLACE LEARNING INTERVENTIONS 139****INTRODUCTION 140**

DEFINING THE OBJECTIVES OF THE LEARNING INTERVENTION	142
THE “MAKE-VERSUS-BUY” DECISION: CREATING OR PURCHASING WORKPLACE LEARNING PROGRAMS	146
SELECTING THE TRAINER	148
Train-the-Trainer Programs	148
Preparing a Lesson Plan	149
SELECTING LEARNING METHODS AND MEDIA	153
PREPARING LEARNING MATERIALS	155
Program Announcements	155
Program Outlines	155
Training Manuals or Books	155
SCHEDULING A WORKPLACE LEARNING PROGRAM	156
Scheduling during Work Hours	156
Scheduling after Work Hours	157
Registration and Enrollment Issues	157
SUMMARY	159
QUESTIONS FOR DISCUSSION	159
EXERCISE 1: OBJECTIVE WRITING FOR A DIVERSITY TRAINING PROGRAM	160
EXERCISE 2: OBJECTIVE WRITING AND DESIGN DECISIONS FOR A TRAINING PROGRAM OF YOUR CHOICE	160
NOTES	160

6 IMPLEMENTING WORKPLACE LEARNING INTERVENTIONS 167

INTRODUCTION	168
LEARNING DELIVERY METHODS	169
ON-THE-JOB TRAINING (OJT) METHODS	171
Job Instruction Training (JIT)	171
Job Rotation	172
Coaching and Mentoring	172
CLASSROOM (INSTRUCTOR-LED) APPROACHES	172
The Lecture Approach	173
The Discussion Method	174
Audiovisual Media	175
Experiential Methods	178
Computer-Based Training (Classroom Based)	182
PROMOTING LEARNER REFLECTION	183
SELF-PACED/TECNOLOGY-BASED TRAINING	183

Computer-Aided Instruction	183
Internet- and Intranet-Based Training	184
Adaptive Training/Intelligent Computer-Assisted Instruction	185
FINAL IMPLEMENTATION ISSUES	185
Arranging the Physical Environment	186
Getting Started	188
SUMMARY	189
QUESTIONS FOR DISCUSSION	190
EXERCISE 1: HOW TO TEACH A PRACTICAL SKILL	190
EXERCISE 2: GENERATING QUESTIONS TO USE WHEN LEADING A DISCUSSION	190
INTEGRATIVE CASE: THE KPMG LAKEHOUSE	191
NOTES	191

7 EVALUATING WORKPLACE LEARNING INTERVENTIONS 205

INTRODUCTION	206
THE WHAT AND WHY OF WORKPLACE LEARNING EVALUATION	207
HOW OFTEN ARE WORKPLACE LEARNING PROGRAMS EVALUATED?	208
THE EVALUATION OF LEARNING PROGRAMS PRIOR TO PURCHASE	209
CHANGING EVALUATION EMPHASES	209
MODELS AND FRAMEWORKS OF EVALUATION	209
Kirkpatrick's Evaluation Framework	210
Other Frameworks or Models of Evaluation	211
Comparing Evaluation Frameworks	212
A STAKEHOLDER APPROACH TO EVALUATION	214
DATA COLLECTION FOR EVALUATION	215
Data Collection Methods	215
Types of Data	217
The Use of Self-Report Data	218
RESEARCH DESIGN	218
ETHICAL ISSUES CONCERNING EVALUATION RESEARCH	220
Confidentiality	221
Informed Consent	221
Withholding Training	221
Use of Deception	222
Pressure to Produce Positive Results	222
ASSESSING THE IMPACT OF HRD PROGRAMS IN MONETARY TERMS	222

Evaluation of Training Costs and Returns	223
Utility Analysis	225
HOW TECHNOLOGY IMPACTS HRD EVALUATION	226
CLOSING COMMENTS ON EVALUATION	227
SUMMARY	229
QUESTIONS FOR DISCUSSION	229
EXERCISE: CALCULATING THE COSTS AND BENEFITS OF TRAINING	230
INTEGRATIVE CASE: WHAT WENT WRONG AT UNIVERSITY HOSPITAL?	231
Appendix 7-1 More on Research Design	232
RESEARCH DESIGN VALIDITY	232
NONEXPERIMENTAL DESIGNS	233
Case Study	233
Relational Research	233
One-Group Pretest–Post-Test Design	234
Reconsideration of Nonexperimental Research Designs	234
EXPERIMENTAL DESIGNS	235
Pretest–Post-Test with Control Design	235
Post-Test Only with Control Design	236
Solomon Four-Group Design	236
QUASI-EXPERIMENTAL DESIGNS	237
Nonequivalent Control Group Design	237
Time Series Design	237
STATISTICAL POWER: ENSURING THAT A CHANGE WILL BE DETECTED IF ONE EXISTS	238
SELECTING A RESEARCH DESIGN	240
NOTES	241

PART 3 HUMAN RESOURCE DEVELOPMENT APPLICATIONS 251

8 ONBOARDING: EMPLOYEE SOCIALIZATION AND ORIENTATION 253

INTRODUCTION	254
SOCIALIZATION: THE PROCESS OF BECOMING AN INSIDER	255
Fundamental Concepts of Socialization	255
VARIOUS PERSPECTIVES ON THE SOCIALIZATION PROCESS	259
Stage Models of Socialization	259
People-Processing Tactics and Strategies	260
Newcomers as Proactive Information Seekers	261
What Do Newcomers Need?	261

THE REALISTIC JOB PREVIEW	262
How Realistic Job Previews Are Used	263
Are Realistic Job Previews Effective?	264
EMPLOYEE ORIENTATION EFFORTS	265
Assessing and Determining the Content of Orientation	266
Orientation Roles	268
Problems with Orientation Programs	270
Designing and Implementing Employee Orientation	271
Evaluating the Effectiveness of Orientation	272
SUMMARY	274
QUESTIONS FOR DISCUSSION	274
EXERCISE: NEW EMPLOYEE ORIENTATION IN A GIG ECONOMY	275
NOTES	275

9 SKILLS AND TECHNICAL TRAINING 287

INTRODUCTION	288
BASIC WORKPLACE COMPETENCIES	289
BASIC SKILLS/LITERACY PROGRAMS	289
Addressing Literacy in the Workplace	290
Designing an In-House Basic Skills/Literacy Program	290
Federal Support for Basic Skills Training	291
TECHNICAL TRAINING	292
Apprenticeships	292
Computer Training	293
Technical Skills/Knowledge Training	294
Safety Training	294
Quality Training	297
INTERPERSONAL SKILLS TRAINING	300
Sales Training	300
Customer Service Training	301
Team Building/Training	302
ROLE OF LABOR UNIONS IN SKILLS AND TECHNICAL TRAINING	303
Joint Training Programs	304
PROFESSIONAL DEVELOPMENT AND EDUCATION	304
Continuing Education at Colleges and Universities	305
Continuing Education by Professional Associations	305

Company-Sponsored Continuing Education	305
HRD's Role in Continuing Education	306
SUMMARY	307
QUESTIONS FOR DISCUSSION	307
EXERCISE: EVALUATING A CLASS PROJECT TEAM	308
NOTES	308

10 COACHING AND PERFORMANCE MANAGEMENT 319

INTRODUCTION	320
COACHING AND PERFORMANCE APPRAISAL	320
COACHING: A POSITIVE APPROACH TO MANAGING PERFORMANCE	321
COACHING AND PERFORMANCE MANAGEMENT	321
DEFINITION OF COACHING	323
THE MANAGER'S ROLE IN COACHING	324
THE HRD PROFESSIONAL'S ROLE IN COACHING	324
COACHING TO IMPROVE POOR PERFORMANCE	325
Defining Poor Performance	325
Responding to Poor Performance	326
CONDUCTING THE COACHING ANALYSIS	327
THE COACHING DISCUSSION	331
The Kinlaw Process	331
The Fournies Process	331
An Analysis and Extension of the Two Approaches	332
MAINTAINING EFFECTIVE PERFORMANCE AND ENCOURAGING SUPERIOR PERFORMANCE	334
SKILLS NECESSARY FOR EFFECTIVE COACHING	335
THE EFFECTIVENESS OF COACHING	337
Employee Participation in Discussion	338
Being Supportive	338
Using Constructive Feedback	339
Setting Performance Goals during Discussion	339
Training and the Manager's Credibility	339
Organizational Support	339
CLOSING COMMENTS ON COACHING AND PERFORMANCE MANAGEMENT	340
Technology, Coaching, and Performance Management	341
SUMMARY	343
QUESTIONS FOR DISCUSSION	343

EXERCISE 1: DESIGN YOUR OWN PERFORMANCE MANAGEMENT SYSTEM	344
EXERCISE 2: CONDUCT A PERFORMANCE REVIEW MEETING	345
NOTES	345

11 EMPLOYEE COUNSELING, WELL-BEING, AND WELLNESS 359

INTRODUCTION	360
Employee Counseling as an HRD Activity	361
The Link between Employee Counseling and Coaching	361
AN OVERVIEW OF EMPLOYEE COUNSELING PROGRAMS	362
Components of a Typical Program	362
Who Provides the Service?	363
Characteristics of Effective Employee Counseling Programs	364
EMPLOYEE ASSISTANCE PROGRAMS	364
Substance Abuse	365
Mental Health	365
The EAP Approach to Resolving Employee Personal Problems	366
Effectiveness of EAPs	369
STRESS MANAGEMENT INTERVENTIONS	370
Defining Stress	371
A Model of Stress Management Interventions	372
The Effectiveness of Stress Management Interventions	373
EMPLOYEE WELLNESS AND HEALTH PROMOTION PROGRAMS	374
Exercise and Fitness Interventions	376
Smoking Cessation	377
Nutrition and Weight Control Interventions	377
Control of Hypertension	378
OVERALL EFFECTIVENESS OF HEALTH AND WELLNESS PROGRAMS	379
ISSUES IN EMPLOYEE COUNSELING	380
Effectiveness of Employee Counseling Interventions	380
Legal Issues in Employee Counseling Programs	381
Whose Responsibility Is Employee Counseling?	381
Ethical Issues in Employee Counseling	382
Unintended Negative Outcomes of Employee Counseling Programs	383
CLOSING COMMENTS	383
SUMMARY	384
QUESTIONS FOR DISCUSSION	385

EXERCISE 1: HOW ARE YOU DEALING WITH STRESS?	385
EXERCISE 2: HOW HEALTHY IS THE PLACE WHERE YOU SPEND MOST OF YOUR WAKING HOURS?	386
NOTES	386

12 CAREER MANAGEMENT AND DEVELOPMENT 401

INTRODUCTION	402
What Is the Nature of the Employment Relationship Today?	402
Impact of Current Employment Relationships on Career Management and Development	404
DEFINING CAREER CONCEPTS	405
What Is a Career?	405
Relationship of Career to Nonwork Activities	405
Career Development	406
Career Planning and Career Management	406
STAGES OF LIFE AND CAREER DEVELOPMENT	407
Stage Views of Adult Development	408
MODELS OF CAREER DEVELOPMENT	411
Stage Models of Career Development	411
Other Views of Career Development	412
Comparing Career Models	414
Life Stage and Career Models as the Conceptual Base for Career Development	414
THE PROCESS OF CAREER MANAGEMENT	414
An Individually Oriented Career Management Model	414
Organizationally Oriented Career Management Models	416
ROLES IN CAREER MANAGEMENT	418
The Individual's Role	418
The Manager's Responsibility	419
The HRD and Career Development Professional's Responsibility	419
CAREER DEVELOPMENT PRACTICES AND ACTIVITIES	420
Self-Assessment Tools and Activities	421
Individual Counseling or Career Discussions	422
Internal Labor Market Information Exchanges and Job Matching Systems	423
Organization Potential Assessment Processes	425
Developmental Programs	426
ISSUES IN CAREER DEVELOPMENT	428
Developing Career Motivation	428
The Career Plateau	429

Career Development for Nonexempt Employees	430
Enrichment: Career Development without Advancement	431
DELIVERING EFFECTIVE CAREER DEVELOPMENT SYSTEMS	432
SUMMARY	434
QUESTIONS FOR DISCUSSION	435
EXERCISE 1: WHAT ARE YOUR CAREER VALUES?	436
EXERCISE 2: THE FIVE-YEAR RESUME	436
NOTES	437
13 MANAGEMENT DEVELOPMENT	455
INTRODUCTION	456
Extent of Management Development Activities	457
Organization of the Chapter	457
DESCRIBING THE MANAGER'S JOB: ROLES AND COMPETENCIES	458
APPROACHES TO UNDERSTANDING THE JOB OF MANAGING	458
Managers as Persons: A Holistic View of the Manager's Job	460
Importance of Needs Assessment in Determining Managerial Competencies	462
The Globally Competent Manager	463
What Competencies Will Future Managers Need?	464
MAKING MANAGEMENT DEVELOPMENT STRATEGIC	465
MANAGEMENT EDUCATION	466
Bachelor's and Master's Degree Programs in Business Administration	466
Executive Education Programs	468
MANAGEMENT TRAINING AND EXPERIENCES	470
Company-Designed Courses	470
Corporate Universities	470
On-the-Job Experiences	471
EXAMPLES OF APPROACHES USED TO DEVELOP MANAGERS	473
Leadership Training	473
Behavior Modeling Training	476
DESIGNING EFFECTIVE MANAGEMENT DEVELOPMENT PROGRAMS	477
SUMMARY	478
QUESTIONS FOR DISCUSSION	479
EXERCISE: PROFILING AN EFFECTIVE LEADER	479
INTEGRATIVE CASE: TRAINING GENERAL MANAGERS AT BRISTOL-MYERS-SQUIBB	480
NOTES	480

14	ORGANIZATION DEVELOPMENT AND CHANGE	497
	INTRODUCTION	498
	Organization Development Defined	498
	Plan of the Chapter	498
	ORGANIZATION DEVELOPMENT THEORIES AND CONCEPTS	499
	Change Process Theory	499
	Implementation Theory	500
	Limitations of Research Supporting OD Theories	502
	MODEL OF PLANNED CHANGE	503
	DESIGNING AN INTERVENTION STRATEGY	505
	Specific Roles	505
	Steps for Designing an Intervention Strategy	507
	Role of HRD Professionals in the Design of OD Interventions	509
	The Role of Labor Unions in OD Interventions	509
	TYPES OF INTERVENTIONS: HUMAN PROCESS–BASED	510
	Survey Feedback	510
	Team Building	511
	Effectiveness of Human Process–Based Interventions	512
	TYPES OF INTERVENTIONS: TECHNO-STRUCTURAL	512
	Job Enlargement	512
	Job Enrichment	512
	Alternative Work Schedules	513
	Effectiveness of Techno-Structural Interventions	514
	TYPES OF INTERVENTIONS: SOCIOTECHNICAL SYSTEMS	514
	Total Quality Management	514
	Self-Managing Teams	516
	HRD Programs as Sociotechnical Intervention Techniques	517
	TYPES OF INTERVENTIONS: ORGANIZATIONAL TRANSFORMATION	517
	Cultural Changes	517
	Strategic Changes	518
	Organizational Learning	519
	High-Performance Work Systems	521
	Effectiveness of Organizational Transformation Change Strategies	522
	Role of HRD Professionals in Organizational Transformation	522
	WHITHER ORGANIZATION DEVELOPMENT?	523
	SUMMARY	524

QUESTIONS FOR DISCUSSION	525
EXERCISE: FORCE FIELD ANALYSIS AND YOU	526
INTEGRATIVE CASE: A PROBLEM AT METRO TRANSIT	526
NOTES	527

15 HRD, DIVERSITY AND INCLUSION: BEYOND DIVERSITY TRAINING 543

INTRODUCTION	544
ORGANIZATIONAL CULTURE	544
LABOR-MARKET CHANGES AND DISCRIMINATION	545
Discrimination	546
Equal Employment Opportunity	549
The Glass Ceiling	549
Impact of Immigration Patterns	550
ADAPTING TO DEMOGRAPHIC CHANGES	550
Affirmative Action Programs	550
Valuing Differences and Using Awareness-Based Diversity Training	552
Effectiveness of Awareness-Based Diversity Training Programs	552
Managing Diversity	552
CROSS-CULTURAL TRAINING AND EDUCATION PROGRAMS	555
HUMAN RESOURCE DEVELOPMENT PROGRAMS FOR CULTURALLY DIVERSE EMPLOYEES	558
Socialization and Orientation	558
Career Development	559
Mentoring to Promote Diversity and Inclusion	559
Anti-Harassment Training	560
OTHER HUMAN RESOURCE MANAGEMENT PROGRAMS AND PROCESSES	561
CLOSING COMMENTS	561
SUMMARY	562
QUESTIONS FOR DISCUSSION	563
EXERCISE 1: VIEWS ON DIVERSITY	563
EXERCISE 2: IBM AND DIVERSITY & INCLUSION	564
NOTES	564

Glossary 578

Index 594

Preface

Employee skills and motivation are critical for organizational success. This has always been true, but the pace and volume of recent changes in the field of human resource development (HRD) have brought increased attention to ways in which HRD can ensure that organization members have what it takes to meet successfully the changes and their accompanying challenges. While there is solid evidence that HRD works, it is not a magic bullet. The challenges that organizations are facing are complex, and new dimensions, such as globalization and an increasingly diverse workforce, make it more difficult to ensure HRD efforts will succeed. Unless those responsible for training and development make informed choices about the content of a developmental experience and the methods of delivering it, the results of many HRD efforts will fall short of expectations.

Fortunately, there is a growing base of theory, research, and practical experience to support HRD efforts. Increasingly, HRD is incorporated within broader efforts at “talent development,” and this broadened emphasis is reflected in the title—and content—of this eighth edition. This text was written to help students, HRD professionals, and managers at all levels take advantage of this knowledge and experience. The conviction behind it is that if this knowledge is put into practice, effectiveness will increase, for individuals and for the organizations of which they are a part.

INTENDED AUDIENCE

Human Resource Development: Talent Development is intended to serve primarily as a comprehensive text for undergraduate and graduate courses in business, management, human resource development, educational administration, public administration, and other fields that prepare individuals to train and develop other people. As such, it:

- Covers the entire field of HRD (as defined by several competency studies by the Association for Talent Development—formerly called the American Society for Training and Development), from orientation and skills training to career development and organizational development
- Provides a clear understanding of the concepts, processes, and practices that form the basis of successful HRD and talent development
- Shows how concepts and theories can and have been put into practice in a variety of organizations
- Focuses on the shared role of line management and human resource professionals in HRD
- Reflects the current state of the field, blending real-world practices and up-to-date research

In addition to being an appropriate text for academic courses, it is an excellent resource for HRD professionals. It can serve as a comprehensive introduction for managers and supervisors who have had limited (or no) coursework or experience with HRD. Not only can they become better trainers and developers, they will become more informed consumers of the HRD/talent development efforts offered by their organizations.

PEDAGOGICAL FEATURES

A number of pedagogical aids are included in the text to enhance learning and interest. These aids include:

- *Learning objectives* and *opening questions* at the beginning of each chapter
- An *opening case* in each chapter that places the contents of the chapter into a meaningful context
- *Illustrations, examples, and boxed inserts* throughout to help readers better assimilate the information
- A *return to the opening case* to provide closure and show how the chapter contents may be used to address the issues in the case
- A list of *key terms at the beginning and key concepts* at the end of each chapter
- *End-of-chapter discussion questions* to stimulate thought and provide students with an opportunity to discuss and apply the information presented in the chapter
- *End-of-chapter exercises* to provide further experience with applying materials from the text and to see how the materials relate to a real-world setting

Numerous examples from organizations, along with perspectives offered by organization leaders and HRD professionals, are used to reinforce concepts and demonstrate the importance of effective HRD to organizational success.

NEW TO THE EIGHTH EDITION

The eighth edition has been updated to reflect the research and thinking on HRD theory and practice that has taken place since 2017. Information from more than 1,600 new sources has been added. Material added to the eighth edition includes the following:

- Updated discussions of talent development, HRD competencies, ethical dilemmas in HRD, as well as certification as a learning and talent development professional (Chapter 1)
- A new opening case on downsizing, plus updated discussion of the many influences on employee behavior and recent research on the subject (Chapter 2)
- A new opening case on learning and agility, a continued emphasis on individual learning styles and preferences, and a new exercise using a reflective learning journal (Chapter 3)
- A new opening case, plus revised discussions of competencies and needs assessment activities, especially in relation to changes caused by technological advances (Chapter 4)
- A new opening case, plus updated information concerning the use of particular training topics and approaches used to design training and other HRD interventions (Chapter 5)
- A new opening case, updated coverage of major methods of providing HRD programs, with emphasis on experiential and reflective learning, and a new exercise on teaching a practical skill (Chapter 6)

- A new opening case on return on investment (ROI), plus updated information on HRD evaluation, an expanded Kirkpatrick evaluation framework, and the use of ROI and utility estimates to communicate HRD effectiveness (Chapter 7)
- A new opening case, updated content concerning orientation and socialization, the effective use of technology in orientation programs, and a new exercise on orienting workers in a gig economy (Chapter 8)
- A new opening case, plus extensive updating concerning the various forms of skills and technical training (Chapter 9)
- Updated coverage of both coaching and performance management, as well as a new figure summarizing factors that contribute to effective coaching (Chapter 10)
- Updated research on the need for, and effectiveness of, employee counseling and worksite wellness and health promotion programs to address such issues as alcohol and drug abuse, stress, hypertension, and fitness; also, a new exercise on healthy workplaces (Chapter 11)
- Updated discussion of the shifts occurring in career development, including new models of career development, learning portfolios, an individual's responsibility in career development, and a new exercise concerning career values (Chapter 12)
- A new opening case, plus updated discussions of the nature of managerial work, strategic management development, global management development, competency-based management education, ethics instruction in management education, and leadership development (Chapter 13)
- A new opening case, updated discussion of the concept of organizational development and change management in today's business environment, and increased coverage of the effectiveness of organization development (Chapter 14)
- An updated opening case concerning diversity and inclusion efforts at major technology organizations, plus new coverage addressing ways that organizations can go beyond diversity training to managing diversity in ways that serve the needs of all employees (Chapter 15)

The elements that made previous editions a useful and meaningful resource for students and practitioners have been maintained and updated, including clear writing, a comprehensive approach to HRD, a strong research base, and a balance among theory, research, and practice. To promote ease of reading, yet still provide easy access to the reference materials, all citations can be viewed as the reader “clicks” over each note in the digital edition.

Questions, comments, and suggestions from users and potential adopters of this text are welcome! You can reach me, Jon Werner, at the Department of Management, University of Wisconsin–Whitewater, Whitewater, WI 53190, by telephone at (262) 472-2007, or by e-mail at wernerj@uww.edu.

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Additional instructor resources for this product are available online. Instructor assets include an Instructor's Manual, PowerPoint® slides, and a test bank powered by Cognero®. Sign up or sign in at **www.cengage.com** to search for and access this product and its online resources.

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I thank my wife, Barbara, and my children, Hans, Noelle, and Abigail, for their on-going love and support. To my wife: You are the best—period! To my children: As each of you has developed into unique and delightful adults, I express again how much you mean to me. Never forget: Ich liebe Euch—sehr viel! I thank my mother, Dorothy, for her sacrificial love and support throughout my life, and for her continued interest in this text. What a model you are of a successful career professional and loving mother. I thank mentors such as Ken Wexley, John Hollenbeck, and Dan Ilgen for shaping my academic career, as well as my uncle, Robert Davis, whose guidance and insights had such an impact on my life. I am grateful for the encouragement received from my department colleagues and the support provided by my current dean, John Chenoweth, and former dean, Christine Clements. I thank Dick Wagner and Roger Yin for their assistance with particular topics in the text.

Readers of this eighth edition should know that the first two editions were written by Randy DeSimone and David Harris; I was added on with the third edition. I first express my gratitude to David M. Harris. Although no longer with us, David was instrumental in creating the work you see before you. Even though it was the third edition that was “In Memoriam” to David, I continue to lift up his memory with thankfulness for what he did to create the first edition of the text.

You can see that this edition has the acknowledgment “With special thanks to Randy L. DeSimone for his invaluable contributions to earlier editions.” Randy was wonderfully supportive of me as I have tweaked and updated various editions of this text. Although no longer listed as an author, his foresight in creating a “broad” focus on HRD has been invaluable to me over the past 20 years. Randy, as you read any “we” statements in this edition, I hope you still hear your voice and influence in this latest edition. You have helped to define and shape HRD as a field of research, study, and practice, and for that I am forever grateful!

PART 1

Foundations of Human Resource Development

- **Chapter 1**
Introduction to Human Resource Development
- **Chapter 2**
Influences on Employee Behavior
- **Chapter 3**
Learning and HRD

CHAPTER

1

KEY TERMS

American Society
for Training and
Development (ASTD)
apprenticeship training
career development
career management
career planning
coaching
competencies
counseling
craft guilds
employee orientation
high-performance work
systems
HR strategic advisor

HR systems designer and
developer
human relations
Human Resource
Certification Institute
(HRCI)
human resource
development (HRD)
human resource
management (HRM)
individual development
individual development
and career counselor
instructor/facilitator
learning organization

learning program specialist
(or instructional designer)
management training and
development
organization change agent
organization design
consultant
organization development
(OD)
performance consultant
(or coach)
performance management
researcher
skills training
training and development
(often abbreviated as T&D)

LEARNING OBJECTIVES

After reading this chapter, you should be able to:

1. Define human resource development (HRD)
2. Relate the major historical events leading up to the establishment of HRD as a profession
3. Distinguish between HRD and human resource management (HRM)
4. Identify and describe each of the major HRD functions
5. Describe how HRD can be linked to the goals and strategies of an organization
6. Recognize the various roles and competencies of an HRD professional
7. Cite contemporary challenges facing HRD professionals
8. Identify the major phases of the training and HRD process

Introduction to Human Resource Development

OPENING CASE

What makes one large bank different from other banks? How important are the size and resources commanded by the bank, versus the bank leadership, strategy, and even marketing that is done? As of January 2020, Kasikorn Bank of Thailand employed over 20,000 employees in 885 branches in Bangkok, throughout Thailand, and in 11 overseas offices. K-Bank, as it is called, has done an impressive job of branding itself, with a bright green “K-Excellence” and logo that are well-recognized throughout Thailand. The bank’s mission statement is “to be the most innovative, proactive, and customer centric financial institution, delivering world-class financial services and sustainable value for all stakeholders by harmoniously combining technology and talent” (About Us, 2020). K-Bank’s leadership team has promoted a strong linkage between its business strategy and its human resource management strategy. As part of this, executives have actively supported the development of “human resource capital,” or “talent development,” including the use of succession planning, career development, training, performance management, and compensation systems, among other things. There is also a strong commitment to what K-Bank has called an “HR roadmap,” where employees at all levels have a formal plan in place that guides employees and their managers in their ongoing development efforts.

Questions: If you were part of the leadership team at K-Bank, what types of human resource issues would you like to see emphasized concerning bank employees? What types of training programs do you think might be appropriate for training managers? How about for training employees? Why? Are there other things that you would include in addition to formal training (e.g., other types of developmental opportunities)? How might all of this fit into the business strategy (or strategies) that the bank is pursuing?

SOURCES: Personal communications with former Kasikorn Bank directors, Mr. Somkiat Sirichatchai and Dr. Schwin Dhammanungune; Wonglimpiyarat, J. (2014). Competition and challenges of mobile banking: A systematic review of major bank models in the Thai banking industry. *Journal of High Technology Management Research*, 25(2), 123–131; Kasikorn Bank (2020). About Us. Accessed on January 10, 2020 at: <https://kasikornbank.com/en/about/Information/Pages/vision-mission.aspx>

INTRODUCTION

Have you ever:

- trained new employees to do their job (either formally or informally)?
- taught another person how to use new technology; for example, conducting a technology-based presentation, setting up a wireless connection, or using a new electronic device, such as an Android tablet or an iPod?
- attended an orientation session for new employees?
- taken part in a company-sponsored training program; for example, diversity training, sexual harassment awareness and prevention, or career development?
- gone through an experiential training experience, such as a “ropes” course or other outdoor learning experience?
- completed some type of career planning project or assessment?
- participated in an organization-wide change effort; for example, your organization was seeking to change its culture and move toward a flatter, more team-oriented structure?

If you said “yes” to any of the previous questions, you’ve been involved in some form of *human resource development*. It is often said that an organization is only as good as its people. Organizations of all types and sizes, including schools, retail stores, government agencies, restaurants, and manufacturers, have at least one thing in common: they must employ competent and motivated workers.¹ This need has become even stronger as organizations grapple with the challenges presented by a dynamic and turbulent global economy. To compete and thrive, many organizations are including employee education, training, and development as an essential part of their organizational strategy. It is estimated that U.S. organizations spent \$83 billion on employee learning and development in 2019.² Organizations surveyed by the Association for Talent Development spent an average of \$1,299 per employee on direct learning.³ Human resource managers in large organizations ranked training and development as the most important functional area they had to deal with. This was followed in descending order by recruiting and selection, productivity and quality, succession planning, employee job satisfaction, compensation, globalization, and diversity.⁴

What is human resource development? Richard Swanson defined it as “a process for developing and unleashing human expertise through training and development and organization development for the purpose of improving performance.”⁵ *Learning* is at the core of all HRD efforts (and will be the focus of Chapter 3). Indeed, a major emphasis today is on *workplace learning and performance*.⁶ Jacobs and Park define workplace learning as “the process used by individuals when engaged in training programs, education and development courses, or some type of experiential learning activity for the purpose of acquiring the competence necessary to meet current and future work requirements.”⁷ For our purposes, then, **human resource development (HRD)** can be defined as “a mechanism in *shaping* individual and group values and beliefs and *skilling* through learning-related activities to support the desired performance of the host system” or organization.⁸ In most cases, this will include systematic and planned activities designed by an organization to provide its members with the opportunities to learn necessary skills that meet both current and future job demands.

Focused most broadly, HRD seeks to develop people’s “knowledge, expertise, productivity, and satisfaction, whether for personal or group/team gain, or for the benefit of an organization, community, nation, or, ultimately, the whole of humanity” (p. 322).⁹ HRD activities should begin when an employee joins an organization and continue throughout their career or length of employment, regardless career, regardless of whether that employee is an executive or a worker on an assembly line. HRD programs must respond to job changes and integrate the long-term plans and strategies of the organization to ensure the efficient and effective use of resources. In short, while training and development activities,

or “T&D” for short, constitute a major part of human resource development, activities such as coaching, career development, team building, and organization development also are aspects of human resource development.

There has been considerable recent interest in the terms *talent management* and *talent development*.¹⁰ One reason the American Society for Training and Development changed its name to the Association for Talent Development was to emphasize that the field (and the organization) were about more than “just” training and development.¹¹ David McGuire has addressed talent development as part of the performance management process (covered in Chapter 10).¹² Thomas Garavan and colleagues describe talent development more broadly, namely as “the planning, selection and implementation of development strategies for the entire talent pool to ensure that the organisation has both the current and future supply of talent to meet strategic objectives and that development activities are aligned with organisational talent management processes” (p. 6).¹³ Al Ariss and colleagues present various ways that the term *talent management* has been used, including as a new term for HRM practices, for succession planning, and for the management of high-potential employees.¹⁴ As these topics are studied further, it is likely that the features of human resource development described in this text will be key features of effective talent management and development.¹⁵

This chapter provides a brief history of significant events contributing to contemporary thought within the HRD field. The relationship between human resource management and HRD is discussed, and then HRD organizational structure, functions, roles, competencies, and process are covered. Certification and education for HRD and HRM professionals is discussed. Next, several critical challenges facing HRD professionals are presented. Finally, a systems or process framework that can guide HRD efforts is offered.

THE PROGRESSION TOWARD A FIELD OF HUMAN RESOURCE DEVELOPMENT

The term *human resource development* has been in common use since the 1980s. However, the concept has been around much longer than that. To understand its modern definition, it is helpful to briefly recount the history of this field.

Early Apprenticeship Training Programs

Swanson and Holton provide an extensive coverage of the history of human resource development.¹⁶ This discussion will begin with the origins of HRD that can be traced to **apprenticeship training** programs, especially those used in the eighteenth century. During this time, small shops operated by skilled artisans produced virtually all household goods, such as furniture, clothing, and shoes. To meet a growing demand for their products, craft-shop owners had to employ additional workers. Without vocational or technical schools, the shopkeepers had to educate and train their own workers. For little or no wages, these trainees, or apprentices, learned the craft of their master, usually working in the shop for several years until they became proficient in their trade. Not limited to the skilled trades, the apprenticeship model was also followed in the training of physicians, educators, and attorneys. Even as late as the 1920s, a person apprenticing in a law office could practice law after passing a state-supervised examination.¹⁷

Apprentices who mastered all the necessary skills were considered “yeomen,” and could leave their master and establish their own craft shops; however, most remained with their masters because they could not afford to buy the tools and equipment needed to start their own craft shops. To address a growing number of yeomen, master craftsmen formed a network of private “franchises” so they could regulate such things as product quality, wages, hours, and apprentice-testing procedures.¹⁸

These craft guilds grew to become powerful political and social forces within their communities, making it even more difficult for yeomen to establish independent craft shops. By forming separate guilds called “yeomanries,” the yeomen counterbalanced the powerful **craft guilds** and created a collective voice in negotiating higher wages and better working conditions. Yeomanries were the forerunners of modern labor unions.¹⁹

Early Vocational Education Programs

In 1809, a man named DeWitt Clinton founded the first recognized, privately funded vocational school, also referred to as a manual school, in New York City.²⁰ The purpose of the manual school was to provide occupational training to unskilled young people who were unemployed or had criminal records. Manual schools grew in popularity, particularly in the midwestern states, because they were a public solution to a social problem: what to do with “misdirected” youths. Regardless of their intent, these early forms of occupational training established a prototype for vocational education.

In 1917, the U.S. Congress passed the Smith–Hughes Act, which recognized the value of vocational education by granting funds (initially \$7 million annually) targeted for state programs in agricultural trades, home economics, industry, and teacher training.²¹ Today, vocational instruction is an important part of each state’s public education system. In fact, given current concerns about a “skills gap” (especially for technical skills), vocational education has become even more critical at the present time.

Early Factory Schools

With the advent of the Industrial Revolution during the late 1800s, machines began to replace the hand tools of the artisans. “Scientific” management principles recognized the significant role of machines in better and more efficient production systems. Specifically, semiskilled workers using machines could produce more than the skilled workers in small craft shops. This marked the beginning of factories as we know them today.

Factories made it possible to increase production by using machines and unskilled workers, but they also created a significant demand for the engineers, machinists, and skilled mechanics needed to design, build, and repair the machines. Fueled by the rapid increase in the number of factories, the demand for skilled workers soon outstripped the supply of vocational school graduates. To meet this demand, factories created mechanical and machinist training programs, which were referred to as “factory schools.”²²

The first documented factory school, in 1872, was located at Hoe and Company, a New York manufacturer of printing presses. This was soon followed by Westinghouse in 1888, General Electric and Baldwin Locomotive in 1901, International Harvester in 1907, and then Ford, Western Electric, Goodyear, and National Cash Register.²³ Factory school programs differed from early apprenticeship programs in that they tended to be shorter in duration and had a narrower focus on the skills needed to do a particular job.

Early Training Programs for Semiskilled and Unskilled Workers

Although both apprenticeship programs and factory schools provided training for skilled workers, very few companies during this time offered training programs for unskilled or semiskilled workers. This changed after two significant historical events. The first was the introduction of the Model T by Henry Ford in 1913. The Model T was the first car to be mass produced using an assembly line,

in which production required only the training of semiskilled workers to perform several tasks.

The new assembly lines cut production costs significantly and Ford lowered its prices, making the Model T affordable to a much larger segment of the public. With the increased demand for the Model T, Ford had to design more assembly lines, and this provided more training opportunities. Most of the other automobile manufacturers who entered the market at this time also used assembly line processes, resulting in a proliferation of semiskilled training programs.

Another significant historical event was the outbreak of World War I. To meet the huge demand for military equipment, many factories that produced nonmilitary goods had to retool their machinery and retrain their workers, including the semiskilled. For instance, the U.S. Shipping Board was responsible for coordinating the training of shipbuilders to build warships. To facilitate the training process, Charles Allen, director of training, instituted a four-step instructional method referred to as “show, tell, do, check” for all of the training programs offered by the Shipping Board.²⁴ This technique was later named job instruction training (JIT) and is still in use today for training many workers on the basic elements of their job.

The Human Relations Movement

One of the undesirable by-products of the factory system was the frequent abuse of unskilled workers, including children, who were often subjected to unhealthy working conditions, long hours, and low pay. The appalling conditions spurred a national anti-factory campaign. Led by Mary Parker Follett and Lillian Gilbreth, the campaign gave rise to the **human relations** movement, which advocated for more humane working conditions. Among other things, the human relations movement provided a more complex and realistic understanding of workers as people instead of merely cogs in a factory machine.

The human relations movement highlighted the importance of human behavior on the job. This was also addressed by Chester Barnard, the president of New Jersey Bell Telephone, in his influential 1938 book *The Functions of the Executive*.²⁵ Barnard described the organization as a social structure integrating traditional management and behavioral science applications.

The movement continued into the 1940s, with World War II as a backdrop. Abraham Maslow published his theory on human needs, stating that people can be motivated by both economic and noneconomic incentives.²⁶ He proposed that human needs are arranged in terms of lesser to greater potency (strength), and distinguished between lower order (basic survival) and higher order (psychological) needs. Theories like Maslow's serve to reinforce the notion that the varied needs and desires of workers can become important sources of motivation in the workplace.

The Establishment of the Training Profession

With the outbreak of World War II, the industrial sector was once again asked to retool its factories to support the war effort. As with World War I, this initiative led to the establishment of new training programs within larger organizations and unions. The federal government established the Training Within Industry (TWI) Service to coordinate training programs across defense-related industries. The TWI also trained company instructors to teach their programs at each plant. By the end of the war, the TWI had trained over 23,000 instructors, awarding over 2 million certificates to supervisors from 16,000 plants, unions, and services.²⁷

Many defense-related companies established their own training departments with instructors trained by TWI. These departments designed, organized, and coordinated

training across the organization. In 1942, the American Society for Training Directors (ASTD) was formed to establish some standards within this emerging profession.²⁸ At the time, the requirements for full membership in ASTD included a college or university degree plus two years of experience in training or a related field, or five years of experience in training. A person working in a training function or attending college qualified for associate membership.

Emergence of Human Resource Development

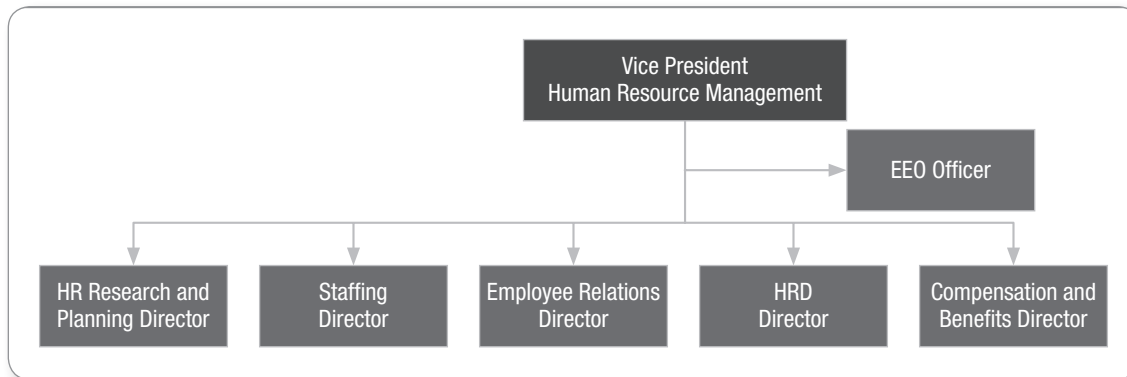
During the 1960s and 1970s, professional trainers realized that their role extended beyond the training classroom. The move toward employee involvement in many organizations required trainers to also get involved with coaching and counseling employees. Training and development (T&D) competencies therefore expanded to include interpersonal skills such as coaching, group process facilitation, and problem solving. This additional emphasis on employee development led the ASTD to rename itself as the **American Society for Training and Development (ASTD)**.

The 1980s saw even greater changes affecting the T&D field. At several ASTD national conferences in the late 1970s and early 1980s, discussions centered on this rapidly expanding profession. As a result, ASTD approved the term *human resource development* to encompass this growth and change. Influential books by individuals such as Leonard and Zeace Nadler appeared in the late 1980s and early 1990s, and these helped to clarify and define the HRD field.²⁹ Further, since the 1990s, efforts have been made to strengthen the *strategic* role of HRD; that is, how HRD links to and supports the goals and objectives of the organization.³⁰ There was also an emphasis within ASTD (and elsewhere, such as the International Society for Performance Improvement, or ISPI) on *performance improvement* as the particular goal of most training and HRD efforts, and on viewing organizations as **high-performance work systems**.³¹ In May 2014, ASTD changed its name to the Association for Talent Development, or ATD. In 2020, ATD had over 35,000 members in over 120 countries, including over 100 U.S. local chapters. It remains the leading professional organization for HRD professionals. Recent emphases in HRD will be discussed more fully in the following section, but first it would be helpful to discuss the relationship between human resource management and HRD.

THE RELATIONSHIP BETWEEN HUMAN RESOURCE MANAGEMENT AND HRD/TRAINING

In some organizations, training is a stand-alone function or department. In most organizations, however, training or human resource development is part of a larger human resource management department.³² **Human resource management (HRM)** can be defined as the effective selection and utilization of employees to best achieve the goals and strategies of an organization, as well as the goals and needs of employees. An important point to stress is that the responsibility for HRM is (or, at least, should be) *shared* by human resource professionals and line management. How the HRM function is carried out varies from organization to organization. Some organizations have a centralized HRM department with highly specialized staff, but in other organizations, the HRM function is decentralized and conducted throughout the organization. Many organizations today outsource aspects of HR to other organizations.³³ Figure 1.1 presents the HRM functions carried out by a larger department, such as an HRM division headed by a vice president.

In 2018, the Society for Human Resource Management (SHRM) published a framework of HR expertise.³⁴ The framework has three domains: people, organization, and workplace, with five functional areas of HR expertise or competence listed

FIGURE 1.1 Organizational Chart of a Large HRM Division.

under each domain. The functional areas listed under the *people* domain are detailed below.

- **Human resource strategic planning** activities seek to develop, implement, and manage the organization's strategic direction. HR strategic planners must continually chart the course of an organization and its plans, programs, and actions.
- **Talent acquisition (staffing)** activities are designed to attract, recruit, and select talent to meet the needs of the organization.
- **Employee engagement and retention** activities address employee satisfaction and engagement, and seek to promote a positive organizational culture.
- **Learning and development** activities seek to build the knowledge, skills, and competencies of the workforce. This is the focus of this text.
- **Total rewards** activities seek to design and implement compensation and benefits structures that will attract and retain employees.

The second domain, *organization*, includes structuring the HR function, organizational effectiveness and development, workforce management, employee and labor relations, and technology management. The third domain, *workplace*, includes the global context of HR, diversity and inclusion, risk management and safety, corporate social responsibility, and employment law and regulations.

Line versus Staff Authority

One of the primary components of an organization's structure is the authority delegated to a manager or unit to make decisions and utilize resources. *Line authority* is given to managers and organizational units that are directly responsible for the production of goods and services. *Staff authority* is given to organizational units that advise and consult line units. Traditionally, HRM functional units, including HRD, have staff authority. In general, line authority supersedes staff authority in matters pertaining to the production of goods and services. For example, suppose several trainees miss training sessions because their supervisor assigned them to duties away from the job site. Can the HRD manager or trainer intervene and force the supervisor to reassign these employees so that they can meet their training responsibilities? The short answer is no. The long answer is that HRD managers and staff must exert as much influence as possible to ensure that organizational members have the competencies to meet current and future job demands. At times this may require some type of intervention (such as organization development) to achieve a greater amount of understanding across an organization of the values and goals of HRD programs and processes.

HUMAN RESOURCE DEVELOPMENT FUNCTIONS

Human resource development, as mentioned above, can be a stand-alone function, or it can be one of the primary functions within the HRM department. An early ASTD-sponsored study by Pat McLagan identified the HRD roles and competencies needed for an effective HRD function.³⁵ This study documented a shift from a focus on training and development, to an inclusion of career development and organization development issues as well. McLagan identified three primary HRD functions: (1) training and development, (2) career development, and (3) organization development. These functions are discussed in greater detail next.

Training and Development (T&D)

Training and development (often abbreviated as T&D) focuses on changing or improving the knowledge, skills, and attitudes of individuals. *Training* typically involves providing employees the knowledge and skills needed to do a particular task or job, though attitude change may also be attempted (e.g., in sexual harassment training). *Developmental activities*, in contrast, have a longer-term focus on preparing for future work responsibilities while also increasing the capacities of employees to perform their current jobs.³⁶

T&D activities begin when a new employee enters the organization, usually in the form of employee orientation and skills training. **Employee orientation** (covered in Chapter 8) is the process by which new employees learn important organizational values and norms, establish working relationships, and learn how to function within their jobs. The HRD staff and the hiring supervisor generally share the responsibility for designing the orientation process, conducting general orientation sessions, and beginning the initial skills training. **Skills training** programs then narrow in scope to teach the new employee a particular skill or area of knowledge (see Chapter 9, which also covers *technical training*).

Once new employees have become proficient in their jobs, HRD activities should focus more on developmental activities—specifically, coaching and counseling. In the **coaching and performance management** process (Chapter 10), individuals are encouraged to accept responsibility for their actions, to address any work-related problems, and to achieve and sustain superior levels of performance. Coaching involves treating employees as partners in achieving both personal and organizational goals. Counseling techniques are used to help employees deal with personal problems that may interfere with the achievement of these goals. **Counseling** programs may address such issues as substance abuse, stress management, smoking cessation, or fitness, nutrition, and weight control (see Chapter 11).

HRD professionals are also responsible for coordinating **management training and development** programs to ensure that managers and supervisors have the knowledge and skills necessary to be effective in their positions. These programs may include supervisory training, job rotation, seminars, or college and university courses (see Chapter 13).

Career Development

Career development is “an ongoing process by which individuals progress through a series of stages, each of which is characterized by a relatively unique set of issues, themes, and tasks.”³⁷ Career development involves two distinct processes: career planning and career management (see Chapter 12).³⁸ **Career planning** involves activities performed by individuals, often with the assistance of counselors and others, to assess their skills and abilities in order to establish a realistic career plan. **Career management** involves taking the necessary steps to achieve that plan, and generally focuses more on what an organization can do to foster employee career development. There is a strong relationship between career development and T&D activities. Career plans can be implemented, at least in part, through an organization’s training programs.

Organization Development

Organization development (OD) is defined as the process of enhancing the effectiveness of an organization and the well-being of its members through planned interventions that apply behavioral science concepts.³⁹ OD emphasizes both macro and micro organizational changes: macro changes are intended to ultimately improve the effectiveness of the organization as a whole, whereas micro changes are directed at individuals, small groups, and teams. For example, many organizations have sought to improve organizational effectiveness by introducing employee involvement programs that require fundamental changes in work expectations, reward systems, and reporting procedures (see Chapter 14).

The role of the HRD professional involved in an OD intervention is generally to function as a *change agent*. Facilitating change often requires consulting with and advising line managers on strategies that can be used to effect the desired change. The HRD professional may also become directly involved in carrying out the intervention strategy by such means as facilitating a meeting of the employees responsible for planning and implementing the actual change process.

The ATD Learning and Performance Wheel

In 2004, Paul Bernthal and colleagues developed a learning and performance wheel.⁴⁰ It presented business strategy at the hub or center of all HRD efforts. Second, the upper right spokes depicted traditional *human resource management* functions, as presented earlier in this chapter. Third, the lower right spokes portrayed how other organizational disciplines, such as sales, production, and finance, also are major drivers of organizational performance. Finally, the left side of the diagram depicted various aspects of human resource development. This wheel visual presented what HRD is and how it fits with other organizational functions. It also complemented ongoing discussions concerning the parameters of HRD, as well as the value added by research and practice in this area.⁴¹

These competencies were revised by Arneson and colleagues in 2013, and this revised competency model is presented in Figure 1.2.⁴² The core functions of training and development, career management, and organizational development, as presented earlier by McLagan, are still evident. However, there is a new focus on learning technologies, and an increased emphasis on learning and performance, rather than primarily on training and development. Indeed, functions such as change management and knowledge management are considerably broader than what has traditionally been viewed as the domain of HRD. Next, the critical linkage between strategic management and HRD is addressed.

Strategic Management and HRD

Strategic management involves a set of managerial decisions and actions that are intended to provide a competitively superior fit with the external environment and enhance the long-run performance of an organization.⁴³ It involves several distinct processes, including strategy formulation, strategy implementation, and control. At the formation or formulation level, top management must first assess the viability of the current mission, objectives, strategies, policies, programs, technology, workforce, and other resources. Then, they must monitor and assess different aspects of the external environment that may pose a threat or offer potential opportunities. Finally, in light of these assessments, management must identify strategic factors (e.g., mission, technology, or product mix) that need to be changed or updated.

The past 40-plus years have seen increasing interest, research, and action concerning strategic human resource management.⁴⁴ The emphasis has been on more fully integrating HRM with the strategic needs of an organization. To do this, two types of alignment are necessary. First, as just described, *external alignment* is

FIGURE 1.2 Learning and Performance Wheel.

© 2014 by Association for Talent Development (ATD, formerly known as ASTD). All Rights Reserved. For use by permission only.

SOURCE: Arneson, J., Rothwell, W., & Naughton, J. (2013). Training and development competencies redefined to create competitive advantage. *T & D*, 67(1), 42–47.

necessary between the strategic plans of the organization and the external environment that it faces. Second, *internal alignment* is necessary within an organization. That is, the strategy of the organization must be aligned with the mission, goals, beliefs, and values that characterize the organization. Further, there needs to be alignment among the various subsystems that make up an organization. Some areas that need to be addressed include:

- Management practices—how employees are managed and treated (e.g., how much do employees participate in decision making?)
- Organizational structure—how an organization is structured (e.g., how “flat” is the organization’s managerial hierarchy?)
- Human resource systems—how employees are selected, trained, compensated, appraised, and so on (e.g., how closely is pay linked to individual, team, or organizational performance measures?)
- Other work practices and systems (e.g., to what extent is technology or an information system used to facilitate the work process?)

The value of this approach lies in looking at the organization as an entire system. All of the parts of an organization must work together as a whole to reach the goals of that organization. Some of the desired outcomes of such a high-performance work system are increased productivity, quality, flexibility, and shorter cycle times, as well as increased customer and employee satisfaction and quality of work life.⁴⁵

A challenge—or opportunity—for HRD professionals is to play a more strategic role in the functioning of their organization. Progress has been made in moving toward a more aligned or “strategically integrated HRD.”⁴⁶ In particular, HRD executives and professionals should demonstrate the strategic capability of HRD in three primary ways: (1) directly participating in their organization’s strategic management process, (2) providing education and training to line managers in the concepts and methods of strategic management and planning, and (3) providing training to all employees that is aligned with the goals and strategies of their organization.⁴⁷

First, HRD executives should contribute information, ideas, and recommendations during strategy formulation and ensure that an organization’s HRD strategy is consistent with its overall strategy. The HRD strategy should offer answers to the following questions: Are the organization’s HRD objectives, strategies, policies, and programs clearly stated? Are all HRD activities consistent with the organization’s mission, objectives, policies, and internal and external environment? How well is the HRD function performing in terms of improving the fit between the individual employee and the job? Are appropriate concepts and techniques being used to evaluate and improve corporate performance?

A second strategic role for HRD professionals is to provide education and training programs that support effective strategic management. Training in strategic management concepts and methods helps line managers develop a global perspective that is essential for managing in today’s highly competitive environment. These issues are offered as part of the organization’s management development program. Management education efforts (such as university programs, which will be discussed in Chapter 13) also place a heavy emphasis on strategic management issues. Increasingly, separate courses (or portions of courses) are emphasizing strategic HR issues and how these relate to organizational strategies and outcomes.⁴⁸

Finally, HRD professionals must ensure that all training efforts are clearly linked to the goals and strategies of the organization. Although this may seem obvious, it is not uncommon for the link between training programs and organizational strategy to be far from clear. As an extreme example, a medical products manufacturer, Becton, Dickinson and Company, went through a major restructuring in response to a downturn in its business. Before that, the company had offered a large number of training and education opportunities, particularly to its managers. After restructuring, these education and training programs were completely eliminated.⁴⁹ Some have argued that the reason training is frequently the first thing to be cut or reduced in times of financial stress is that top executives fail to see a link between training and the bottom line.⁵⁰ As will be discussed in Chapter 7, HRD professionals are increasingly expected to demonstrate that their efforts are contributing to the viability and financial success of their organization. The growing emphasis on strategic HRD is part of this movement to build a stronger business case for HRD programs and interventions.⁵¹

The Supervisor’s Role in HRD

Supervisors play a critical role in implementing many HRD programs and processes. As emphasized throughout this text, many organizations rely on line supervisors to implement HRD programs and processes such as orientation, training, coaching, and career development.⁵² Especially in smaller organizations, there may be no training department (or even an HR department), so most HRD efforts fall upon supervisors and managers.

Organizational Structure of the HRD Function

The HRD function, like HRM, should be designed to support an organization's strategy. Using the chart from Figure 1.1, Figure 1.3 further delineates how the HRD function might be organized within an HRM department. Alternatively, Figure 1.4 depicts how the HRD function might be organized in a multiregional sales organization. In this example, the training activities, except for management/executive development, are decentralized and other HRD activities are centralized. There is evidence to suggest that, at least in larger organizations, HR departments are becoming more cross-functional and less specialized in HR topics alone.⁵³

FIGURE 1.3 Organizational Chart of a Large HRD Department.

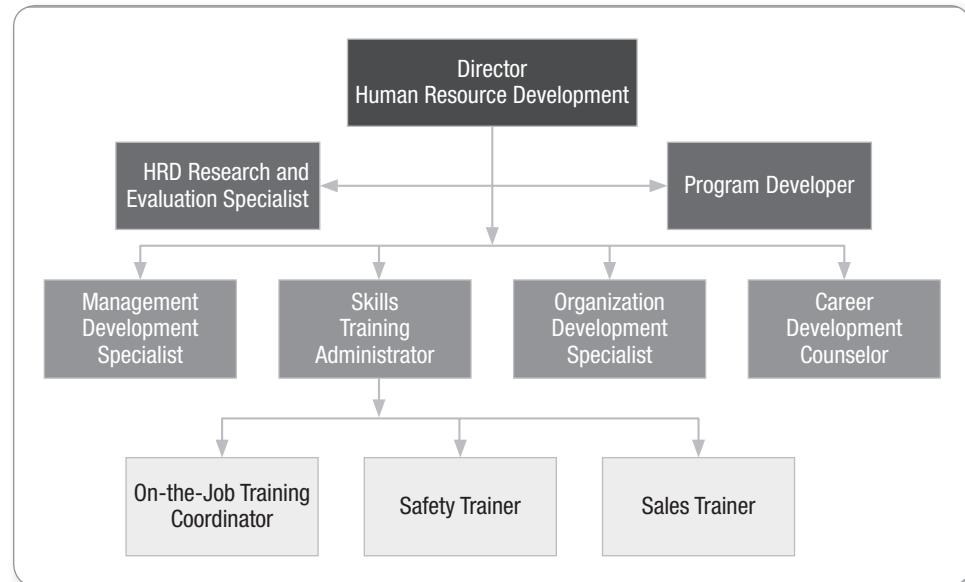
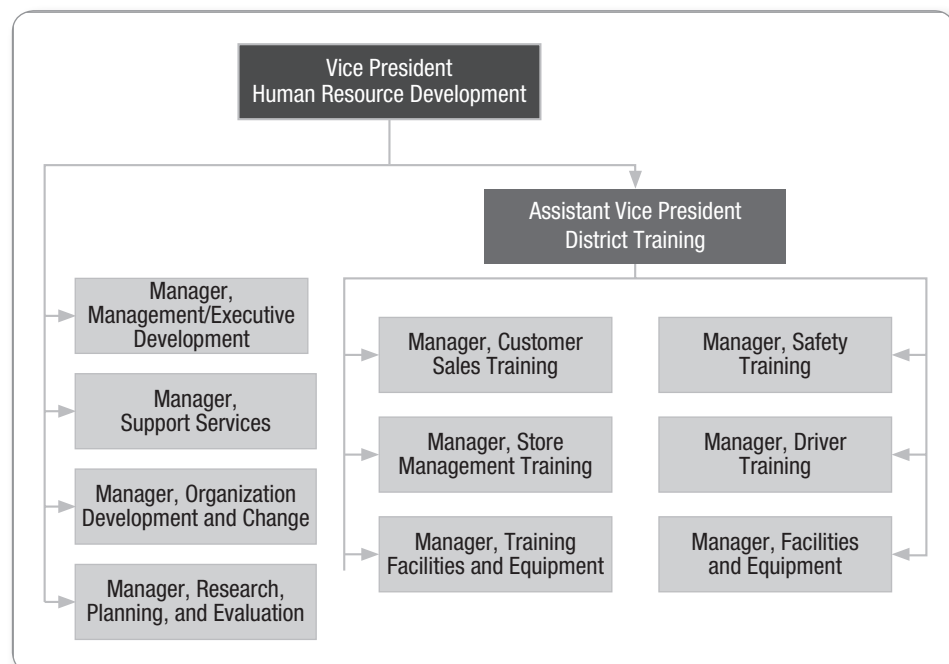


FIGURE 1.4 Organizational Chart of an HRD Department in a Multiregional Sales Organization.



ROLES AND COMPETENCIES OF AN HRD PROFESSIONAL

An HRD professional must perform a wide variety of functional roles. A functional role is a specific set of tasks and expected outputs for a particular job; for example, classroom trainer or instructional designer. To carry out these various roles, HRD professionals need to possess many different skills or **competencies**. The ATD Competency Model depicts 10 areas of expertise: performance improvement, instructional design, training delivery, learning technologies, evaluating learning impact, managing learning programs, integrated talent management, coaching, knowledge management, and change management.⁵⁴ In addition, six foundational competencies are presented: business skills, interpersonal skills, global mindset, personal skills, industry knowledge, and technology literacy.⁵⁵ HRD professionals make use of these foundational competencies as they develop particular areas of expertise. Recently, an emphasis has also been placed on developing personal, professional, and organizational *capabilities*, with the intention that capabilities can be more future-oriented, so that HRD professionals can adapt to meet future needs.⁵⁶

Next, the roles played by two types of HRD professionals (i.e., the HRD executive/manager and the HRD practitioner) are briefly discussed.

The HRD Executive/Manager

The HRD executive/manager has primary responsibility for all HRD activities. In the past, this person was often referred to as the *training director*. Today, such individuals are increasingly referred to as the *chief learning officer* (or CLO).⁵⁷ Regardless of the title, this individual must integrate the HRD programs with the goals and strategies of the organization and normally assumes a leadership role in the executive development program, if one exists. If the organization has both an HRM and an HRD executive, the HRD executive must work closely with the HRM executive as well. The HRD executive often serves as an adviser to the chief executive officer and other executives.⁵⁸ The outputs of this role include long-range plans and strategies, policies, and budget allocation schedules.

One of the important tasks of the HRD executive is to promote the value of HRD as a means of ensuring that organizational members have the competencies to meet current and future job demands. If senior managers do not understand the value of HRD, it will be difficult for the HRD executive to get their commitment to HRD efforts and to justify the expenditure of funds during tough times. Historically, during financial difficulties, HRD programs (and HRM in general) have been a major target of cost-cutting efforts. Unless the HRD executive establishes a clear relationship between HRD expenditures and organizational effectiveness (including profits), HRD programs will not receive the support they need. But how does an HRD executive who wants to offer a program on stress management, for example, compete with a line manager who wants to purchase a new piece of equipment? The answer is clear: the executive must demonstrate the benefit the organization receives by offering such a program. Evaluation data are vital to the HRD executive when presenting a case.

The role of the HRD executive has become more important and visible as organizations address the demands of a global economy. The immediate challenge to HRD executives is to redefine a new role for HRD during this period of unprecedented change. According to Jack Bowsher, former director of education for IBM, when HRD executives “delve deeply into reengineering, quality improvement, and strategic planning, they grasp the link between workforce learning and performance on the one hand, and company performance and profitability on the other.”⁵⁹ The HRD executive is in an excellent position to establish the credibility of HRD programs and processes as tools for managing in today’s challenging business environment. Salary.com estimated that, in 2020, the median salary for U.S. HRD/training executives was over \$186,000.⁶⁰

Other HRD Roles and Outputs for HRD Professionals

HRD professionals perform many distinct roles, nine of which are described below.⁶¹ These roles are likely to correspond to the job titles or job descriptions for professional positions in HRD.

The **HR strategic advisor** consults strategic decision-makers on HRD issues that directly affect the articulation of organization strategies and performance goals. Outputs include HR strategic plans and strategic planning education and training programs.

The **HR systems designer and developer** assists HR management in the design and development of HR systems that affect organization performance. Outputs include HR program designs, intervention strategies, and implementation of HR programs.

The **organization change agent** advises management in the design and implementation of change strategies used in transforming organizations. The outputs include more efficient work teams, quality management, intervention strategies, implementation, and change reports.

The **organization design consultant** advises management on work systems design and the efficient use of human resources. Outputs include intervention strategies, alternative work designs, and implementation.

The **learning program specialist (or instructional designer)** identifies needs of the learner, develops and designs appropriate learning programs, and prepares materials and other learning aids. Outputs include program objectives, lesson plans, and intervention strategies.

The **instructor/facilitator** presents materials and leads and facilitates structured learning experiences. Outputs include the selection of appropriate instructional methods and techniques and the actual HRD program itself.

The **individual development and career counselor** assists individual employees in assessing their competencies and goals in order to develop a realistic career plan. Outputs include individual assessment sessions, workshop facilitation, and career guidance.

The **performance consultant (or coach)** advises line management on appropriate interventions designed to improve individual and group performance. Outputs include intervention strategies, coaching design, and implementation.

The **researcher** assesses HRD practices and programs using appropriate statistical procedures to determine their overall effectiveness and communicates the results to their organization. Outputs include research designs, research findings and recommendations, and reports.⁶²

Sample HRD job titles include instructional designer, technology trainer, change agent, executive coach, and multimedia specialist.⁶³ For an example of a recent job posting for an instruction designer, see the Job Posting for an Instructional Designer box.

Certification and Education for HRD Professionals

One indication of the growth of the HRD field is the increased emphasis on professional certification.⁶⁴ In 2006, ASTD/ATD began a certification program based upon the competencies identified in its “Mapping the Future” study.⁶⁵ Until April 2020, this certification was called the Certified Professional in Learning and Performance™ (CPLP™), and was offered by the ATD Certification Institute. It included both a 150-item multiple-choice knowledge exam and a skills application exam. Effective April 1, 2020, ATD offers a new certification, the Certified Professional in Talent Development (CPTD). To be eligible for the CPTD exam, individuals must have (1) at least three years of paid professional work experience in talent development, and (2) completed 28 hours of professional development within the three most recent years. This second requirement can also be fulfilled by having earned an ATD Masters designation.⁶⁶

For the field of human resource management in general, the **Human Resource Certification Institute (HRCI)** began offering HR certifications in 1976. HRCI offers three primary certifications: the Professional in Human Resources (PHR), Senior Professional in Human Resources (SPHR), and Global Professional in Human Resources (GPHR) examinations. There is also an aPHR certification, for those beginning their HR careers. The PHR and SPHR examinations both consist of 175 multiple-choice items that cover various HRM topics.⁶⁷ Ten percent of the PHR exam and 12 percent of the SPHR exam cover learning and development. The GPHR examination consists of 165 items, with 22 percent of the items devoted to “talent and organizational development.” To be certified for any of these three examinations, individuals must pass the test and have the required years of HR exempt-level work experience for that test. As of January 2019, over 128,000 HR professionals have been certified with either the PHR, SPHR, or GPHR designations (PHR: 74,602; SPHR: 51,056; GPHR: 2,983), with an additional 4,230 attaining the aPHR designation.⁶⁸

In 2015, SHRM began offering two certification exams of its own, which are designated the SHRM Certified Professional (SHRM-CP) and the SHRM Senior Certified Professional (SHRM-SCP). Similar to the ATD approach, these exams are competency based and linked to the SHRM competency model.⁶⁹ These exams are not affiliated with HRCI, even though SHRM had, up until 2014, worked in conjunction with HRCI to promote the PHR, SPHR, and GPHR examinations. While there remains some confusion and controversy concerning separate certifications from HRCI and SHRM, both certifications appear to be valuable and well received in the workplace.⁷⁰

Over the past thirty years, the HRD profession has become better connected to the academic community. Three historical developments illustrate this relationship: (1) ATD changed its governance structure to include a Professor’s Network and an Academic Relations Committee; (2) *Human Resource Development Quarterly*, a research journal focusing on HRD issues, began publishing in 1990; (3) a separate organization was formed in 1993, the Academy of Human Resource Development (AHRD), to further advance scholarly research concerning human resource development issues.⁷¹ This has led to the subsequent publication of three additional AHRD-sponsored journals: *Advances in Human Resource Development*, *Human Resource Development International*, and *Human Resource Development Review*.

HRD programs at colleges and universities are most often found in one of three academic departments: business/management, psychology, and education. The content and philosophy of these programs tend to reflect that of the founding professors.

Job Posting for an Instructional Designer

Consider the following posting:

Sandia National Laboratories, Albuquerque, New Mexico is seeking a Training & Development Instructional Designer.

On any given day, you may be called on to:

- Develop and manage instructional design projects, including purpose, objectives, budgets, rollout plans, follow-up, and evaluation.
- Apply learning science principles to develop classroom, virtual, and online learning.
- Utilize advanced techniques and technologies, including Virtual Reality, Augmented

Reality, and learning tools such as Captivate/Storyline.

- Support staff development efforts by developing new delivery capabilities, such as social media, simulations, gamification, and peer-contributed knowledge bases.
- Consult with management and training councils to identify training needs and propose creative learning solutions for business and learning objectives.

SOURCE: Adapted from ATD Job Bank, Job 670411 (2020). Accessed on January 13, 2020 at: jobs.td.org/jobs/

Certain schools of business (or management) offer majors or minors in HRD, with courses in training and development, organization development, and career development. SHRM has created a directory of bachelors and graduate HR programs that is available on the SHRM website.⁷² Some psychology departments offer degree programs and courses in industrial and organizational (I/O) psychology, with specific courses in HRD. In addition to HRD classes, schools of education may also offer degrees and courses in fields related to HRD, such as educational technology, curriculum development, adult learning, and organization development. A listing of academic programs in HRD can be found on the AHRD website.⁷³

CHALLENGES TO ORGANIZATIONS AND TO HRD PROFESSIONALS

Organizations face many opportunities and challenges today. Eight workplace trends impacting HRD are depicted in Figure 1.5.⁷⁴ Along the same lines, Michael Hitt and his colleagues identified increasing globalization and the technological revolution (in particular, the Internet) as two primary factors that make for a new competitive landscape.⁷⁵ They suggest a number of actions that organizations can take to address the uncertainty and turbulence in the external environment. These actions include developing employee skills, effectively using new technology, developing new organizational structures, and building cultures that foster learning and innovation. These methods obviously have a great deal to do with human resource development. Next, six particular challenges facing the field of HRD are presented. These challenges include: (1) competing in a global economy, (2) eliminating the skills gap, (3) addressing workforce diversity and inclusion, (4) meeting the need for lifelong individual learning, (5) facilitating organizational learning, and (6) addressing ethical issues and dilemmas in a proactive manner. Each of these challenges and their potential impact on HRD will be discussed briefly in the following sections and further amplified in later chapters.

FIGURE 1.5 Workplace Trends.

- 1. Drastic times, drastic measures:** Uncertain economic conditions force organizations to reconsider how they can grow and be profitable.
- 2. Blurred lines—life or work?** New organizational structures are changing the nature of work for employees and HRD professionals.
- 3. Small world and shrinking:** Global communication technology is changing the way people connect and communicate.
- 4. New faces, new expectations:** Diversity in the workplace continues to rise.
- 5. Work be nimble, work be quick:** The accelerated pace of change requires more adaptable employees and nimbler organizations.
- 6. Security alert!** Concerns about security and about the ability of governments to provide protection have increased individual anxiety levels worldwide.
- 7. Life and work in the e-lane:** Technology, especially the Internet, is transforming the way people work and live.
- 8. A higher ethical bar:** Ethical lapses at the highest levels in large organizations have shaken employees' loyalty, trust, and sense of security.

SOURCES: Colter, K., & Davis, P. (2004). Eight trends you need to know. *T&D*, 58(1), January, 28–36; Neirrotti, P., & Paolucci, E. (2013). Why do firms train? Empirical evidence on the relationship between training and technological and organizational change. *International Journal of Training & Development*, 17(2), 93–115; Cascio, W. F. (2014). Investing in HRD in uncertain times now and in the future. *Advances in Developing Human Resources*, 16(1), 108–122; Whysall, Z., Owtram, M., & Brittain, S. (2019). The new talent management challenges of Industry 4.0. *Journal of Management Development*, 38(2), 118–129.

Competing in a Turbulent Global Economy

As organizations compete in a turbulent global economy, many new technologies are introduced that require better-educated and trained workers.⁷⁶ In fact, in the United States today, over one-half of all jobs require education beyond high school. Thus, successful organizations must hire employees with the knowledge to compete in an increasingly sophisticated market. Competing in the global economy requires more than educating and training workers to meet new challenges. In addition to retraining the workforce, successful companies institute quality improvement processes and introduce change efforts (e.g., high-involvement programs). The workforce must learn cultural sensitivity to better communicate and conduct business among different cultures and in other countries.⁷⁷ Developing managers into global leaders has been identified as a major challenge for organizations.⁷⁸ Developing globally competent managers will be discussed in more detail in Chapter 13.⁷⁹

Addressing the Skills Gap

For companies to compete successfully in a global economy, they must hire *educated* workers; however, at least in the United States, portions of the public education system are stretched and finding it challenging to provide graduates with the skills employers are seeking. This skills gap poses serious consequences for organizations.⁸⁰ How can trainees learn how to operate new equipment if they cannot read well enough to comprehend operating manuals? Furthermore, how can new employees be taught to manipulate computer-controlled machines if they do not understand basic math?⁸¹

Other industrialized nations have made systematic changes in order to bridge the skills gap. For example, Japan and Germany have educational systems that successfully teach students the basic skills needed by most employers. Among other things, Germany emphasizes vocational education and school-to-work transition programs, so that school-age children can begin apprenticeship programs as part of their formal education. These and other approaches will be discussed in more detail in Chapter 9.

Addressing Workforce Diversity and Inclusion

The workforce has become more diverse, and this trend toward diversity will continue.⁸² This includes increasing diversity along racial, ethnic, and gender lines, as well as an increasing percentage of the workforce that is over age 55.⁸³ Diversity and inclusion issues have several implications for HRD professionals. First, organizations need to address racial, ethnic, and other prejudices that may persist, as well as cultural insensitivity and language differences (this will be discussed in more detail in Chapter 15). Second, with the increasing number of women in the workforce, organizations should continue to provide developmental opportunities that will prepare both men and women for advancement into the senior ranks and provide safeguards against sexual harassment. Third, the aging of the workforce highlights the importance of creating HRD programs that recognize and address the learning-related needs of both younger and older workers (this will be discussed in Chapter 3). Diversity *can* be a catalyst for improved organizational performance—though this is far from a sure thing.⁸⁴

The Need for Lifelong Learning

Given the rapid changes that all organizations face, it is clear that employees must continue the learning process throughout their careers in order to meet these challenges.⁸⁵ This need for lifelong learning will require organizations (as well as governments and society as a whole) to make an ongoing investment in HRD. Lifelong

learning can mean different things to different employees. For example, for semi-skilled workers, it may involve more rudimentary skills training to help them build or update their competencies. For professional employees, this learning may mean taking advantage of continuing education opportunities. This is particularly important for certified professionals who are required to complete a certain number of continuing education courses to maintain their certification. For managers, lifelong learning may include attending management seminars that address new management approaches.

The challenge to HRD professionals is to provide a full range of learning opportunities for all employees. One way that organizations are meeting this challenge is by establishing multimedia learning centers (either in a physical location or online). These centers offer a variety of instructional technologies that can be matched to each trainee's unique learning needs. Individual assessments can determine deficiencies or gaps in employees' performance capabilities while also pointing out their preferred learning styles. For instance, self-motivated employees found to be deficient in arithmetic might be trained in an interactive video program allowing them to set their own pace. A multimedia learning center could also provide teleconferencing facilities for technical and professional employees to participate in a seminar that is being conducted thousands of miles away. These and other different approaches to learning will be discussed in future chapters. What is clear, however, is that whether they use multimedia or other training approaches, organizations must find a way to provide lifelong learning opportunities for all of their employees.

Facilitating Organizational Learning

Organization development scholars such as Chris Argyris, Richard Beckhard, and Peter Senge have recognized that if organizations are going to make fundamental changes, they must be able to learn, adapt, and change.⁸⁶ It is important that organizations promote organizational learning and, further, seek to become a **learning organization**.⁸⁷ Chapter 14 includes a discussion of how macro-level organization transformation approaches can be used to help an organization adopt the principles of a learning organization.

Although such principles emphasize the organizational level, they also have implications at the group and individual levels. One challenge for HRD professionals is facilitating a transition from traditional training programs to emphasizing three things: learning principles and tactics; how learning relates to performance; and, more importantly, the relationship between learning and fundamental change.⁸⁸ To do this, HRD professionals must develop a solid understanding of learning theory and be able to devise learning tools that enhance **individual development**. These concepts and tools will be discussed in more detail in Chapters 3, 9, and 12.

Addressing Ethical Dilemmas

The many business scandals over the past decades pose troubling questions for organizations, government, society, business education, and human resource development.⁸⁹ How could schemes such as those at Enron, WorldCom, and other companies go on for so long? What are the possibilities and limitations of legal and governmental actions (such as the Sarbanes–Oxley Act)?⁹⁰ What can business education do to promote an understanding of ethics, ethical behavior, and integrity among students and graduates?⁹¹

Ethical issues and dilemmas also arise for human resource development. For example, suppose you were asked to provide consulting services for an organization, and in the process of the work, you suspected that the primary intention of the manager(s) who hired you was to provide a rationale for closing the facility in which you

did your consulting work. How would you respond? Are there ethical principles or guidelines to assist HRD professionals in handling such situations? Efforts have been made to address these issues. These include a 20-page report, “Standards on Ethics and Integrity, Second Edition” produced by a subcommittee of the Academy of Human Resource Development.⁹² There are useful writings on the subject by Timothy Hatcher, as well as other works addressing difficult issues concerning the possibility of a global *HRD Code of Ethics*.⁹³ These ethical issues will be addressed at various points throughout the chapters.

A FRAMEWORK FOR THE HRD PROCESS

HRD programs and interventions can be used to address a wide range of issues and problems in an organization. They are used to orient and socialize new employees into the organization, provide skills and knowledge, and help individuals and groups become more effective. To ensure that these goals are achieved, care must be taken when designing and delivering HRD programs.

Following from system theory, it is argued that HRD interventions should be designed using a four-step process or sequence: needs assessment, design, implementation, and evaluation. For ease of memory, this can be referred to as the “A DIImE” framework (assess, design, implement, and evaluate). This four-phase process approach is used to describe HRD efforts: needs assessment, design, implementation, and evaluation (see Figure 1.6).⁹⁴

Needs Assessment Phase

HRD interventions are used to address some need or gap within an organization. A need can be either a current deficiency, such as poor employee performance, or a new challenge that demands a change in the way the organization operates (e.g., new legislation or increased competition). Identifying needs involves examining an

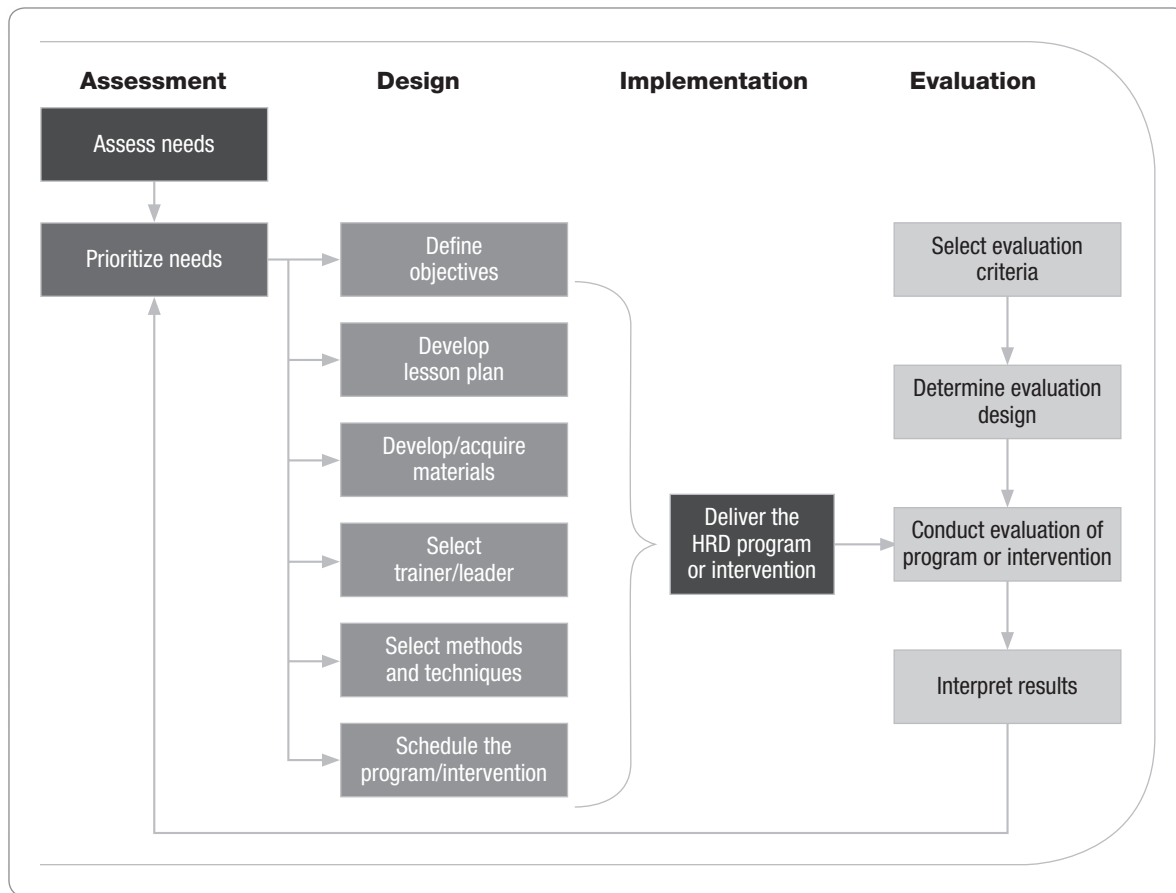
ATD Code of Ethics

The *Code of Ethics* provides guidance to individuals to be self-managed, workplace learning and performance professionals. Clients and employers should expect the highest possible standards of personal integrity, professional competence, sound judgment, and discretion. Developed by the profession for the profession, the *Code of Ethics* is the public declaration of workplace learning and performance professionals’ obligations to themselves, their profession, and society. I strive to:

- Recognize the rights and dignities of each individual
- Develop human potential
- Provide my employer, clients, and learners with the highest level quality education, training, and development
- Comply with all copyright laws and the laws and regulations governing my position

- Keep informed of pertinent knowledge and competence in the workplace learning and performance field
- Maintain confidentiality and integrity in the practice of my profession
- Support my peers and avoid conduct which impedes their practicing their profession
- Conduct myself in an ethical and honest manner
- Improve the public understanding of workplace learning and performance
- Fairly and accurately represent my workplace learning and performance credentials, qualifications, experience, and ability
- Contribute to the continuing growth of the profession

SOURCE: Association for Talent Development (ATD). Accessed on January 10, 2020 at: td.org/about/vision-mission-code-of-ethics

FIGURE 1.6 Training and HRD Process Model.

organization, its environment, job tasks, and employee performance. This information can be used to:

- Establish priorities for expending HRD efforts
- Define specific training and HRD objectives
- Establish evaluation criteria

Design Phase

The second phase of the training and HRD process involves designing the HRD program or intervention. If the intervention involves some type of training or development program, the following activities are typically carried out during this phase:

- Selecting the specific objectives of the program
- Developing an appropriate lesson plan for the program
- Developing or acquiring the appropriate materials for the trainees to use
- Determining who will deliver the program
- Selecting the most appropriate method or methods to conduct the program
- Scheduling the program

Once the assessment phase has been completed, it is important to translate the issues identified in that phase into clear objectives for HRD programs. This should

also facilitate the development of clear lesson plans concerning what should be done in the HRD program. Selecting the proper person to deliver the HRD program is also an important decision, and it can be difficult, depending on the resources available. If the organization employs a group of full-time HRD professionals, the choice will depend largely on the expertise and work schedules of those professionals. However, if the organization does not have an HRD staff, it will have to rely on other people, including managers, supervisors, coworkers, or outside consultants. Using such individuals raises a host of issues, from costs to their willingness, ability, and availability to train.

The design phase also involves selecting and developing the content of the program. This means choosing the most appropriate setting for the program (e.g., on the job, in a classroom, online, or some combination), the techniques used to facilitate learning (such as lecture, discussion, role play, simulation), and the materials to be used in delivering the program (such as workbooks, job aids, web-based or web-enhanced materials, films, videos, slide presentations, etc.). Inherent in these decisions is the issue of whether to develop the program in house or purchase it (or parts of it) from an outside vendor.

Scheduling the program may not be as easy as it appears. Issues to be resolved include allocating lead time to notify potential participants, determining program length and location, covering participants' regular job duties, and addressing and resolving potential conflicts (such as vacations, busy periods, and facility availability).

The needs assessment may also reveal that training is not the ideal solution for the issues or problems facing an organization. It may be that some management practice needs to be changed, or that changes need to be made in another human resource practice (such as staffing or compensation). It may also be the case that a different type of HRD intervention is called for besides training; for example, a change in the organization of work, or a change in the focus on total quality or process reengineering. Such HRD interventions would not require a lesson plan. However, other design issues occur with career management and organizational development interventions (these will be discussed in later chapters of the text).

Implementation Phase

The goal of the assessment and design phases is to implement effective HRD programs or interventions. This means that the program or intervention must be delivered or implemented using the most appropriate means or methods (as determined in the design phase). Delivering any HRD program generally presents numerous challenges, such as executing the program as planned, creating an environment that enhances learning, and resolving problems that may arise (missing equipment, conflicts between participants, etc.).

Evaluation Phase

Program evaluation is the final phase in the training and HRD process. This is where the effectiveness of the HRD intervention is measured. This is an important but often underemphasized activity. Careful evaluation provides information on participants' reaction to the program, how much they learned, whether they use what they learned back on the job, and whether the program improved the organization's effectiveness. HRD professionals are increasingly being asked to provide evidence of the success of their efforts using a variety of "hard" and "soft" measures; that is, both bottom-line impact and employee reactions.⁹⁵ This information allows managers to make better decisions about various aspects of the HRD effort, such as:

- Continuing to use a particular technique or vendor in future programs
- Offering a particular program in the future

- Budgeting and resource allocation
- Using some other HR or managerial approach (like employee selection or changing work rules) to solve the problem

It is important that HRD professionals provide evidence that HRD programs improve individual and organizational effectiveness. Armed with this information, HRD managers can better compete with managers from other areas of the organization when discussing the effectiveness of their actions and vying for organizational resources.

ORGANIZATION OF THE TEXT

This text is organized into three parts: foundation, framework, and applications. The image meant to be captured here is that of building a new home or other structure. First, Part 1, which includes Chapters 1, 2, and 3, presents *foundational* material. **Part 1** is meant to ensure that the reader has a strong base of foundational concepts before exploring the HRD process and the various ways that HRD is practiced in organizations. As you have just seen, Chapter 1 presents an overview of HRD, including three of its major areas of emphasis: training and development, career development, and organizational development. Because all HRD efforts involve trying to bring about changes in learning and behavior, it is important for you to understand why people in the workplace behave the way they do and how people learn. These issues are the focus of Chapters 2 and 3. Chapter 2 explores the major factors that affect workplace behavior, and Chapter 3 focuses on how people learn, the factors that affect learning, and ways to maximize learning.

Part 2 includes Chapters 4, 5, 6, and 7. In these chapters, the HRD and training process is described, focusing on the activities described earlier, namely needs assessment, design, implementation, and evaluation. These chapters are anchored in the *framework* shown in Figure 1.6 and provide the heart or main HRD story line. Chapter 4 details the importance of assessing the need for HRD and the approaches that can be used to perform a needs assessment. Chapter 5 focuses on designing HRD interventions based on the information obtained from the needs assessment. Activities discussed in this chapter include establishing program objectives and content, selecting a trainer, choosing HRD methods and media, and addressing the practical issues involved in delivering the program. Chapter 6 emphasizes implementation issues and highlights the different types of training methods available to deliver training content, both in the traditional training classroom and via technology. Chapter 7 completes our discussion of the HRD process by explaining the importance of evaluating HRD efforts and demonstrating ways an evaluation can be done to ensure decisions made about HRD programs are based on meaningful and accurate information. Because of the increased importance of technology to *all* phases of the HRD process, material has been included in each of the chapters in Part 2 to highlight how technology is impacting and changing the way HRD is conducted.

The remainder, **Part 3**, focuses on particular topic areas within human resource development; that is, HRD *applications*. With so many methods available to choose from, one can feel like Alice in Wonderland; that is, having fallen down a rabbit hole, Alice finds many doors available, with little idea of which one to choose!¹⁹⁶ Selected HRD topics and methods are addressed in Part 3. Chapters 8–12 focus more on individual-level employee development issues, from orientation to career development. Chapter 8 discusses the socialization process, its importance to employee and organizational effectiveness, and how orientation programs can be used to facilitate successful socialization. Chapter 9 describes skills training programs, including ways to ensure that employees possess the specific skills (such as literacy, technological, and interpersonal skills) that they need to perform effectively and contribute to an organization's success. Chapter 10 discusses the



importance of coaching and performance management, and explains how supervisors and line managers can successfully fulfill their critical coaching and performance management responsibilities. Chapter 11 provides an overview of employee counseling as a way to help employees overcome personal and other problems (such as substance abuse or stress) and remain effective in the workplace. Finally, Chapter 12 focuses on career development as a way to ensure an organization's members can be prepared to meet their own and the organization's needs over the course of their working lives.

The final three chapters focus on more macro issues in HRD. Chapter 13 discusses how individuals can be developed to fulfill the multifaceted challenge of becoming effective managers. Chapter 14 explores how HRD can be used to prepare organizations for change, including ways to diagnose organizational problems and how to create and implement intervention strategies to improve individual, group, and organizational effectiveness. Chapter 15 closes with a discussion of organizational challenges and opportunities concerning diversity and inclusion, and the role HRD can play in meeting these challenges and achieving the goal of full participation by all members of an organization.

It is hoped that you, the reader, will find this to be an exciting and dynamic field. Everyone working in an organization of any size is impacted by human resource development. Whether you currently work in the field, hope to do so someday, or simply want to learn more about HRD, you will be impacted by the topics discussed.⁹⁷ It is hoped that you will study and learn the content, enjoy the process (really!), and then apply what you learn to your own work experiences. The concepts and models can make you a more effective employee, manager, or trainer/HRD professional. The text before you (along with the materials available on the Cengage website) are our part (Jon Werner, following from the outstanding original efforts by David Harris and Randy DeSimone). Your professors or instructors will add their part. But the last piece of the equation is yours—what will you put into and get out of your study of the field of human resource development? Enjoy the journey!

Return to Opening Case

Like most organizations, K-Bank faced many challenging issues as it sought to promote employee growth and development in the midst of turbulent economic and political developments. Many of the issues K-Bank faced have been mentioned in this chapter.

SUMMARY

This chapter defined human resource development as a process of shaping individuals' values and beliefs and instilling required knowledge, skills, competencies, and attitudes through learning interventions to support the performance and sustainability of the organization. Next, several historical events were highlighted that contributed to the establishment of human resource development. Early training programs (such as apprenticeships) focused on skilled training. At the turn of the twentieth century, more emphasis was placed on training semiskilled workers. Training departments were introduced in many large companies during World War II. The establishment of the professional trainer led to the formation of a professional society (ASTD; now ATD). This culminated in the 1980s when ASTD, in partnership with the academic community, officially recognized the professional designation of *human resource development (HRD)*.

HRD, as part of a larger human resource management system, includes training and development, career development, and organization development programs and processes. HRD managers and staff must establish working relationships with line managers to coordinate HRD programs and processes throughout the organization. To be effective, HRD professionals must possess a number of competencies and must be able to serve in a number of roles. These roles will help the HRD professional meet the challenges facing organizations in this new century. These challenges include competing in a global economy, addressing the skills gap, addressing workforce diversity and inclusion, promoting lifelong learning, facilitating organizational learning, and addressing ethical dilemmas. The systems or HRD process framework (A DImE—assess, design, implement, evaluate) was presented as a major framework for promoting effective HRD efforts. The remainder of the text expands upon the concepts introduced in this chapter.

QUESTIONS FOR DISCUSSION

1. Do supervisors have HRD responsibilities? If so, how do they coordinate these with HRD professionals?
2. In your opinion, what HRD skills or competencies does an HRD manager need? How are these skills and competencies learned?
3. What qualities do you think an HRD professional must possess to be effective in an organization of approximately 1,000 employees? How might your answer be different for an organization with 10,000 employees? Support your answers.
4. Briefly describe an HRD effort in a familiar organization. Was it successful? If so, why? If not, what contributed to its failure?
5. A manager states that “HRD must become more strategic.” What does this statement mean, and what can HRD professionals do to practice “strategic HRD”?
6. Which challenges to HRD professionals discussed in this chapter will directly affect your present or future working environment? What additional challenges do you foresee affecting HRD?

EXERCISE: INTERVIEW AN HRD PROFESSIONAL

Conduct an informational interview with an HRD professional. This could be someone working in the areas of training and development, career development, or organizational development. Some of the questions you might ask include the following:

1. What do they do in their job?
2. What has changed in their job over the past five to ten years?
3. Where do they see the HRD field going in the next five to ten years?

Your instructor will give you guidelines as to the appropriate length and format for the written document you turn in for this assignment.

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