

# HUMAN RESOURCE DEVELOPMENT

## Talent Development

WERNER

SEVENTH EDITION

# Human Resource Development

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## TALENT DEVELOPMENT

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**SEVENTH EDITION**

*Jon M. Werner*



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**Human Resource Development: Talent Development, Seventh Edition**  
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WCN: 02-300

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Library of Congress Control Number: 2016942607

ISBN: 978-1-337-29653-3

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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; Message translation)*

*With special thanks to*

*Randy L. Desimone*

*Rhode Island College*

*for his invaluable contributions to past editions.*

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# Preface

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Employee skills and motivation are critical for organizational success. This has always been true, but the pace and volume of recent change bring increased attention to the ways that human resource development (HRD) activities can be used to ensure that organization members have what it takes to successfully meet their challenges. While there is solid evidence that HRD works, it is not a magic bullet. The challenges many organizations face 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 fail to meet 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 revised title—and content—for this seventh 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* is intended to serve primarily as a comprehensive text for undergraduate and graduate courses in business, management, public administration, educational 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 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 specialists 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 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 and 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 in the chapter
- *Exercises* have been included in every chapter to provide further experience with applying materials from the text, or 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 SEVENTH EDITION

The seventh edition has been updated to reflect the research and thinking on HRD theory and practice that has taken place since 2012. Information from more than 1,280 new sources has been added. Some examples of material added to the seventh edition are:

- A new section on talent development, plus updated discussions of ethical dilemmas in HRD, HRD competencies, as well as certification as a learning professional (Chapter 1)
- A new end-of-chapter case on motivation, plus updated discussion of the many influences on employee behavior to include recent research (Chapter 2)
- A new case on learning and development at IBM, plus a continued emphasis on individual learning styles and preferences, along with an updated discussion of how technology changes employee learning (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)
- Updated information concerning the use of particular training topics and approaches used to design training and other HRD interventions (Chapter 5)

- A new end-of-chapter case on HBSC, plus updated coverage of major methods of providing HRD programs, with expanded emphasis on experiential and reflective learning (Chapter 6)
- Updated information on a stakeholder approach to HRD evaluation, an expanded Kirkpatrick evaluation framework, and the use of return on investment (ROI) and utility estimates to communicate HRD effectiveness (Chapter 7)
- Updated content concerning orientation and socialization, with expanded discussion of ways to effectively use technology in orientation programs (Chapter 8)
- 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 framing figure to better connect the topics in this chapter (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, plus new content concerning the Affordable Care Act (Chapter 11)
- Updated discussion of the shifts occurring in career development, including the changing employment relationship, new models of career development, team-based career development, learning portfolios, and the individual's responsibility in career development (Chapter 12)
- 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, including transformational leadership and experience-based approaches (Chapter 13)
- Updated discussion of the concept of organizational development and change management in today's business environment plus increased coverage of the effectiveness of organization development (Chapter 14)
- A new opening case concerning diversity efforts at major technology organizations, while addressing current ways that organizations can go beyond diversity training to effectively manage diversity to serve the needs of all employees (Chapter 15)

The elements that made previous editions a useful and meaningful resource to students and practitioners have been maintained and updated, including clear writing, a comprehensive approach to HRD, a strong research base, and a balance between 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 "hovers" 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](mailto:wernerj@uww.edu).

## ANCILLARIES

A number of excellent supplements have been developed to accompany the seventh edition.

- **Instructor's Manual with Test Bank.** The Instructor's Manual with Test Bank contains chapter outlines, sample syllabi, and follow-up materials for the



opening cases and many of the exercises in the text. An updated test bank within Cognito is also available for this revision of the text.

- **PowerPoint Slides.** A detailed set of PowerPoint slides is available with this new edition. These excellent teaching tools highlight key concepts from the text. The slide set is easy to customize to better meet the needs of your course.
- **Student Website.** A student support website accompanies this new edition of the text—students have access to flashcards, glossary terms, and brief quizzes for each chapter.
- **CengageBrain.** All ancillaries can be found at CengageBrain ([www.cengagebrain.com](http://www.cengagebrain.com))

## ACKNOWLEDGMENTS

I am impressed by the talented and dedicated team put together by Cengage Learning. I thank Michael Roche for his strong commitment to the project, and the Cengage leadership team for their support for a seventh edition of this text. I also thank Emily Horowitz, Marketing Manager, for her superb marketing of the text. Megan Fischer deserves special thanks for her expert guidance in revising the text and other materials for the seventh edition. Thanks to Kim Kusnerak for her skill in shepherding the completed manuscript through the production process. Many thanks to all of you!

I thank my wife, Barbara, and my children, Hans, Noelle, and Abigail, for their love and support during the latest revision process. This was another amazing year for all of us! To my wife: You are the best—period! To my children: As each of you develops into unique and delightful adults, I want to 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 I have received from my department colleagues and the support provided by my department chair, James Bronson, and 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, and Amanda Howell for her assistance in finding new materials for the seventh edition.

Readers of this seventh 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 seventh edition has the acknowledgment “With special thanks to Randy L. DeSimone for his invaluable contributions to past editions.” Randy has been wonderfully supportive of me as I have tweaked and updated recent 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 15 years. Randy, even though the “we” statements are no longer a part of 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 newer field of study, 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

human resource development (HRD)	skills training	organization design consultant
apprenticeship training	coaching	learning program specialist (or instructional designer)
craft guilds	counseling	instructor/facilitator
human relations	management training and development	individual development and career counselor
American Society for Training and Development (ASTD)	career development	performance consultant (or coach)
high performance work systems	career planning	researcher
human resource management (HRM)	career management	Human Resource Certification Institute (HRCI)
training and development (often abbreviated as T&D)	organization development (OD)	learning organization
employee orientation	competencies	individual development
	HR strategic advisor	
	HR systems designer and developer	
	organization change agent	

## 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 some of the 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 2015, Kasikorn Bank of Thailand employed over 20,000 employees in over 1,100 branches in Bangkok, throughout Thailand, and in 14 overseas offices. K-Bank, as it is called, has done an impressive job of branding themselves, with a bright green “K-Excellence” and logo that are well-recognized throughout Thailand. Their mission statement is that they aim “to be a strong financial institution that provides a variety of financial services of world-class quality responsive to customers’ needs by harmoniously combining technology and human resources so as to achieve optimal benefits to customers, shareholders, employees and society” (2013 Annual Report, p. 1). Their leadership team has promoted a strong linkage between their business strategy and their 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 executive-level commitment to what they have called an “HR roadmap,” where employees at all levels have a formal plan in place that guides employees and their managers in their on-going 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 Mr. Somkiat Sirichatchai, Kasikorn Bank Board of Directors, and Dr. Schwin Dhammanungune, Former Director, Kasikorn Bank; Annual Report (2013). Accessed on January 2, 2015 at: [http://www.kasikornbank.com/EN/Investors/FinanInfoReports/FinancialReportsAnnual/2013\\_AR\\_ENALL.pdf](http://www.kasikornbank.com/EN/Investors/FinanInfoReports/FinancialReportsAnnual/2013_AR_ENALL.pdf); 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 (2015). Company background. Accessed on January 2, 2015 at: <http://www.kasikornbank.com/EN/AboutUs/CompanyBackground/Pages/CompanyBackground.aspx>

## INTRODUCTION

Have you ever:

- trained a new employee to do his or her job (either formally or informally)?
- taught another person how to use a new technology, for example, how to conduct an effective presentation, set up a wireless Internet connection, or use a hand-held 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, for example, a vocational interest inventory?
- 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.<sup>1</sup> This need has become even stronger as organizations grapple with the challenges presented by a fast-paced, highly dynamic, and increasingly turbulent global economy. To compete and thrive, many organizations are including employee education, training, and development as an essential part of their organizational strategy. The **Association for Talent Development** (ATD, formerly the American Society for Training and Development) estimates that U.S. organizations spent \$164.2 billion on employee learning and development in 2012, with a slight increase in spending per employee reported in 2013.<sup>2</sup> 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.<sup>3</sup> Alan Greenspan, former chairman of the U.S. Federal Reserve Board, stated that a “critical aspect of wealth creation in the United States, and doubtless globally, is the level of knowledge and skill of the population. Today, the knowledge required to run the economy, which is far more complex than in the past, is both deeper and broader than ever before. We need to ensure that education in the United States, formal or otherwise, is supplying skills adequate for the effective functioning of our economy.”<sup>4</sup>

What is human resource development? As a starting point, 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.”<sup>5</sup> *Learning* is at the core of all HRD efforts (and will be the central focus of Chapter 3). Indeed, a major focus today is on *workplace learning and performance*.<sup>6</sup> 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.”<sup>7</sup> For our purposes, then, **human resource development (HRD)** can be defined as a “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 host system” or organization.<sup>8</sup> 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)."<sup>9</sup> HRD activities should begin when an employee joins an organization and continue throughout his or her 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*.<sup>10</sup> 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.<sup>11</sup> David McGuire has addressed talent development as part of the performance management process (which is covered in Chapter 10).<sup>12</sup> 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).<sup>13</sup> 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.<sup>14</sup> As these topics continue to be further studied and clarified, it is very likely that the features of human resource development described in this text will be key features of effective talent management and development.<sup>15</sup>

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.<sup>16</sup> 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.<sup>17</sup>

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.<sup>18</sup> 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.<sup>19</sup>

## 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.<sup>20</sup> 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.<sup>21</sup> Today, vocational instruction is an important part of each state’s public education system. In fact, given the 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.”<sup>22</sup>

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.<sup>23</sup> 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.<sup>24</sup> 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 advocating 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*.<sup>25</sup> 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.<sup>26</sup> 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.<sup>27</sup>

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.<sup>28</sup> 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.

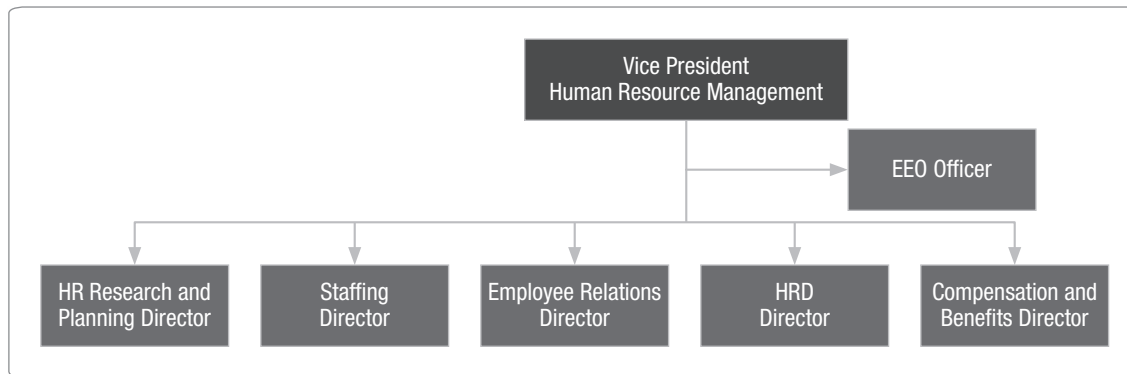
## Emergence of Human Resource Development

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 held 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.<sup>29</sup> 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.<sup>30</sup> 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**.<sup>31</sup> In May 2014, ASTD changed its name to the Association for Talent Development, or ATD. In 2014, ATD had over 40,000 members in over 120 countries, including 125 U.S. local chapters and 5,000 international members. It remains the leading professional organization for HRD professionals.<sup>32</sup> Recent emphases in HRD (and within ATD) 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.<sup>33</sup> **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.<sup>34</sup>

**FIGURE 1.1** Organizational Chart of a Large HRM Division.

The most comprehensive way to present the HRM function is to examine the activities carried out by a larger department, such as the HRM division headed by a vice president, as depicted in Figure 1.1. HRM can be divided into primary and secondary functions. *Primary functions* are directly involved with obtaining, maintaining, and developing employees. *Secondary functions* either provide support for general management activities or are involved in determining or changing the structure of the organization. These functions are detailed below.

- **Human resource planning** activities are used to predict how changes in management strategy will affect future human resource needs. These activities are critically important with the rapid changes in external market demands. HR planners must continually chart the course of an organization and its plans, programs, and actions.
- **Equal employment opportunity** activities are intended to satisfy both the legal and moral responsibilities of an organization through the prevention of discriminatory policies, procedures, and practices. This includes decisions affecting hiring, training, appraising, and compensating employees.
- **Staffing (recruitment and selection)** activities are designed for the timely identification of potential applicants for current and future openings and for assessing and evaluating applicants in order to make selection and placement decisions.
- **Compensation and benefits** administration is responsible for establishing and maintaining an equitable internal wage structure, a competitive benefits package, as well as incentives tied to individual, team, or organizational performance.
- **Employee (labor) relations** activities include developing a communications system through which employees can address their problems and grievances. In a unionized organization, labor relations will include the development of working relations with each labor union, as well as contract negotiations and administration.
- **Health, safety, and security** activities seek to promote a safe and healthy work environment. This can include actions such as safety training, employee assistance programs, and health and wellness programs.
- **Human resource development** activities are intended to ensure that organizational members have the skills or competencies to meet current and future job demands. This last point, quite obviously, is the focus of this work.

## Secondary HRM Functions

Other functions that may be shared by HRM units include the following:

- **Organization/job design** activities are concerned with interdepartmental relations and the organization and definition of jobs.
- **Performance management and performance appraisal systems** are used for establishing and maintaining accountability throughout an organization.
- **Research and information systems** (including Human Resource Information Systems) are necessary to make enlightened human resource decisions.

## 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 ASTD-sponsored study by Pat McLagan in 1989 identified the HRD roles and competencies needed for an effective HRD function.<sup>35</sup> This ASTD study documented a shift from the more traditional training and development topics to a function that included career development and organization development issues as well. The study depicted the relationship between HRM and HRD functions as a “human resource wheel.” The original HR wheel from 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.<sup>36</sup>

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** 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.”<sup>37</sup> Career development involves two distinct processes: career planning and career management (see Chapter 12).<sup>38</sup> **Career planning** involves activities performed by an individual, often with the assistance of counselors and others, to assess his or her 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

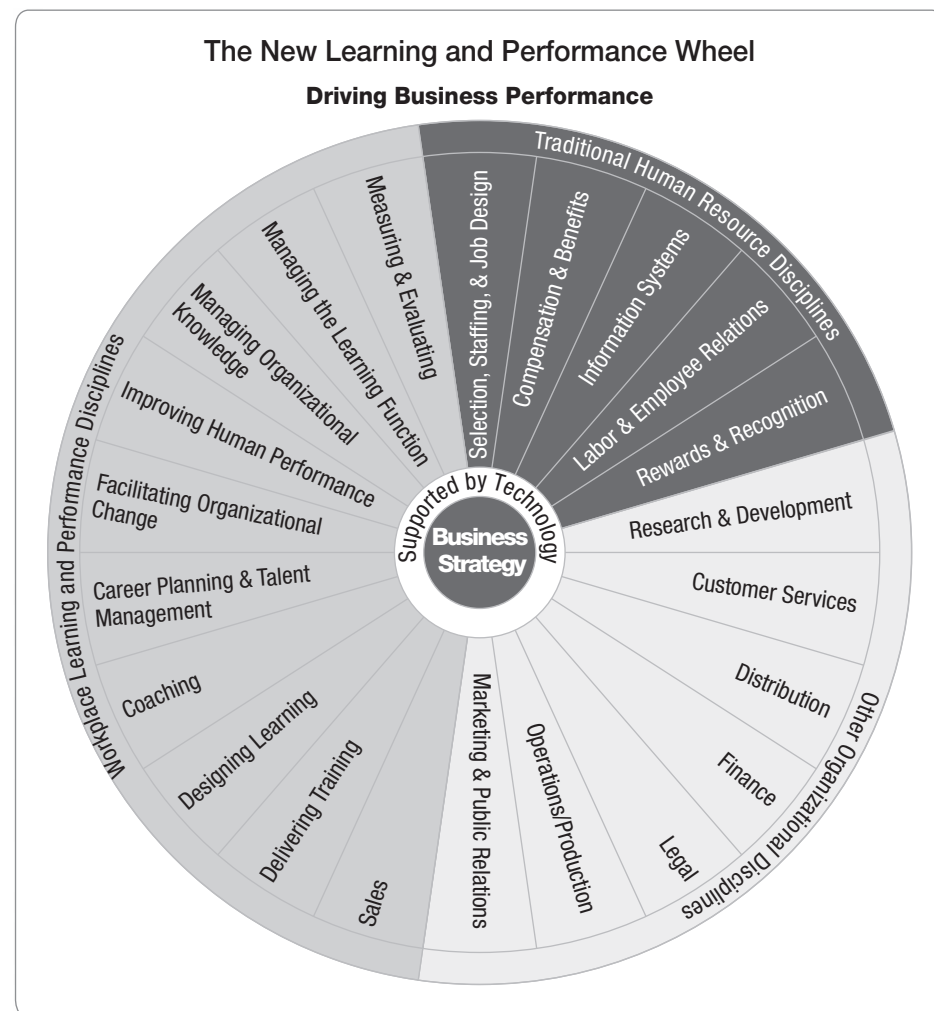
**Organization development (OD)** is defined as the process of enhancing the effectiveness of an organization and the well-being of its members through planned interventions that apply behavioral science concepts.<sup>39</sup> OD emphasizes both macro and micro organizational changes: macro changes are 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.

## An Updated “Learning and Performance Wheel”

More recently, ASTD/ATD sponsored another study of trends affecting HRD and skills or competencies that are required of HRD professionals.<sup>40</sup> As part of this study, Paul Bernthal and his colleagues developed an updated learning and performance wheel (see Figure 1.2). Several things should be noted about this wheel. First, as described below, business strategy should be at the hub or center of all HRD efforts. Second, the upper right spokes depict traditional *human resource management* functions, as presented earlier in this chapter. Third, the lower right spokes portray how other organizational disciplines, such as sales, production, and finance, also are major drivers of organizational performance. Finally, and most importantly for our purposes, the left side of the diagram depicts an expanded view of human resource development. You can still see the core functions of training and development, career management, and managing

**FIGURE 1.2** Learning and Performance Wheel.



SOURCE: Davis, P., Naughton, J., & Rothwell, W. (2004). "New roles and new competencies for the profession." *T&D*, 58(4), 26–36. Copyright © April 2004 from T&D by Davis, P., Naughton, J., & Rothwell, W. Reprinted with permission of American Society for Training & Development.

organizational change and development, as presented earlier by McLagan. However, there is an increased emphasis on learning and performance, rather than primarily on training and development. Indeed, functions such as managing organizational change and managing organizational knowledge are considerably broader than what has traditionally been viewed as the domain of HRD. This expanded wheel provides a clear picture of what HRD is and how it fits with other organizational functions. It also complements on-going discussions concerning the parameters of HRD, as well as the value added by research and practice in this area.<sup>41</sup> Next, the notion of business strategy as the *hub* of the wheel is covered, as well as the critical (though often underdeveloped) linkage between strategic management and HRD.

## 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.<sup>42</sup> 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 35 years have seen increasing interest, research, and action concerning strategic human resource management.<sup>43</sup> 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 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.<sup>44</sup> 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.<sup>45</sup> As one example, Delta Airlines uses several different practices that foster employee commitment and involvement. Bruce Kaufman describes how this “commitment model” has developed and changed since the 1970s, and has allowed this airline to function in a very turbulent industry.<sup>46</sup>

A current 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.”<sup>47</sup> 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.<sup>48</sup>

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? Tom Kelly, director of worldwide training for Cisco Systems in San Jose, California, states that there have been dramatic changes in the HRD field. He adds: “This is our chance to actually achieve strategic partnerships within the organization.”<sup>49</sup>

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 help 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. A survey of HRD professionals suggested that approximately 50 percent of organizations provide training in strategic planning.<sup>50</sup> 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.<sup>51</sup>

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 1983, 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.<sup>52</sup> 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.<sup>53</sup>

In contrast, IBM set up a Human Resource Service Center in Raleigh, North Carolina. The goal was to provide information and high-quality service to over 500,000 active and retired IBM employees. An array of technology is in place to assist Service Center employees. This includes a website within the organization’s intranet (called HR INFO), a call tracking system, and an HR Information System, which employees and managers can use to view and retrieve HR-related information, as well as process certain HR transactions (salary changes, address changes, etc.). However, the key factor in the success of this effort has been training. According to Bob Gonzales: “Training Customer Service Representatives well [was] critical to the Center’s success because they are the initial point of contact with the customer.”<sup>54</sup> Service representatives are carefully selected and then put through three weeks of intensive training, including lectures, role playing, and partnering with an



experienced employee. Refresher training is provided throughout the employee's career, as well as additional training whenever new programs are offered. This example suggests how training can be linked to the strategic goals and strategies of an organization (in this case, a shift to a centralized HR Service Center). 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.<sup>55</sup> This fully supports the placement of business strategy at the center of the learning and performance wheel, as presented in Figure 1.2.

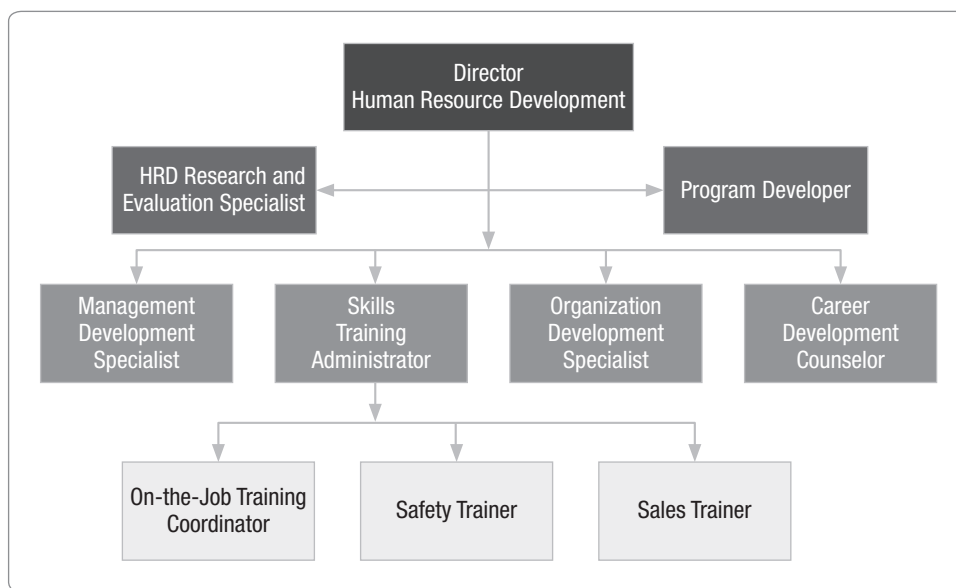
## The Supervisor's Role in HRD

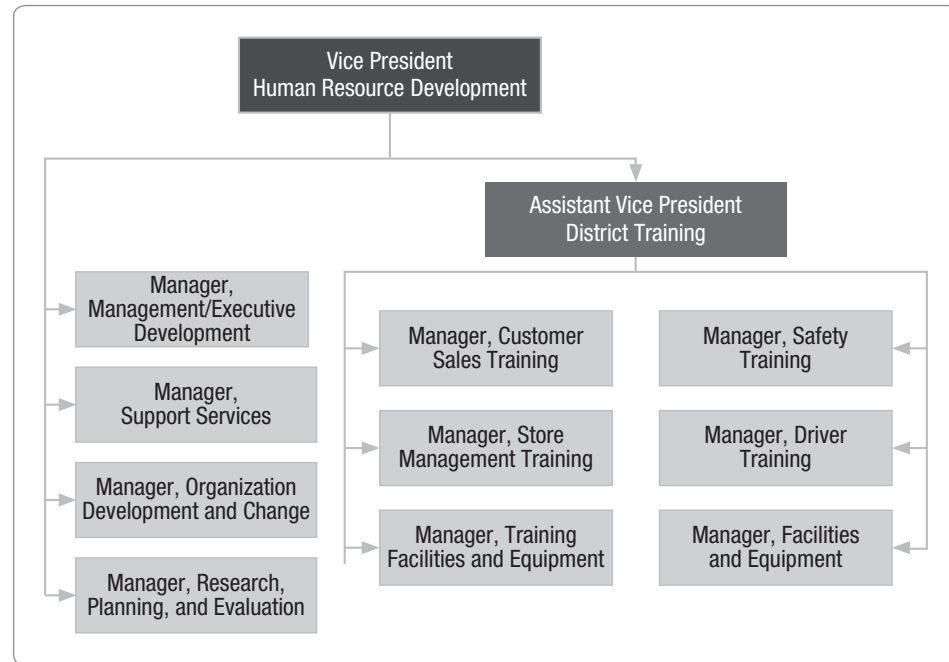
Supervisors play a critical role in implementing many HRD programs and processes. As emphasized throughout, many organizations rely on line supervisors to implement HRD programs and processes such as orientation, training, coaching, and career development.<sup>56</sup> Especially in smaller organizations, 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.<sup>57</sup>

**FIGURE 1.3** Organizational Chart of a Large HRD Department.

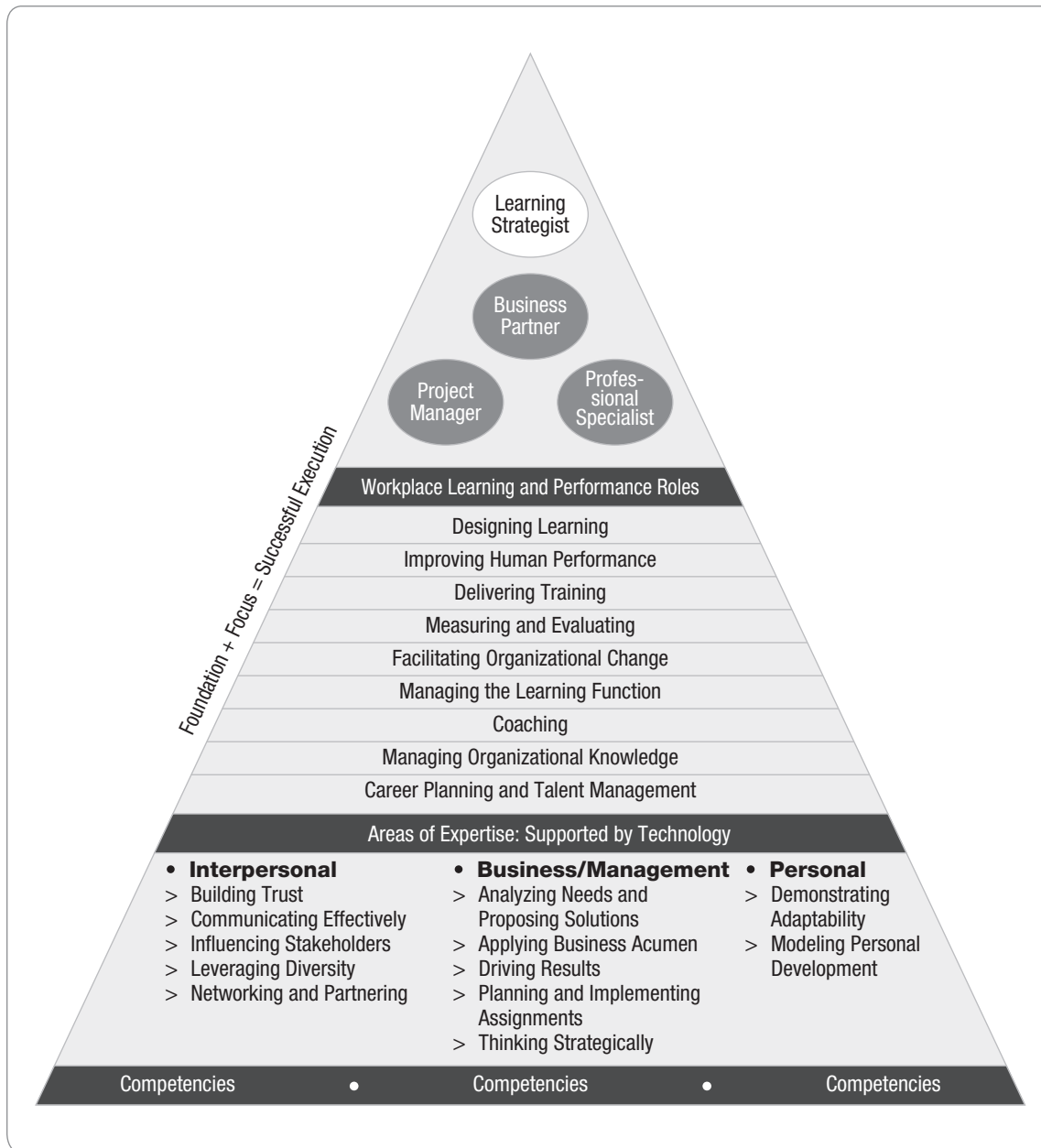


**FIGURE 1.4** Organizational Chart of an HRD Department in a Multiregional Sales Organization.

## 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**. In their “Mapping the Future” study, Bernthal and colleagues describe three areas of “foundational” competencies needed by all HRD professionals (see Figure 1.5).<sup>58</sup> Foundational competencies are depicted as falling into three areas: personal, interpersonal, and business/management. HRD professionals then make use of these foundational competencies as they develop particular areas of expertise. These areas of expertise are shown in the middle of the pyramid (and correspond to the terms used to describe HRD in the learning and performance wheel shown in Figure 1.2). In 2013, Arneson and colleagues presented a modified set of training and development competencies. The 10 areas are: performance improvement, instructional design, training delivery, learning technologies, evaluating learning impact, managing learning programs, integrated talent management, coaching, knowledge management, and change management.<sup>59</sup> This is largely a further refinement of the competencies presented in Figure 1.2.

At the top of the pyramid in Figure 1.5 are four key roles for HRD professionals: learning strategist, business partner, project manager, and professional specialist. The learning strategist is involved in the high-level decision making concerning how HRD initiatives will support the goals and strategies of an organization. The business partner works together with managers and others in determining how the HRD initiative will be implemented and evaluated. The project manager is involved with the day-to-day planning, funding, and monitoring of HRD initiatives, whereas the professional specialist adds his or her expertise to particular areas, for example, designing,

**FIGURE 1.5** The 2004 ASTD Competency Model.

SOURCE: Davis, P., Naughton, J., & Rothwell, W. (2004). "New roles and new competencies for the profession." *T&D*, 58(4), 26–36.

developing, delivering, and evaluating an HRD initiative. HRD managers and executives are most likely to be involved with the learning strategist and business partner roles. 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).<sup>60</sup> Regardless of the title, this individual must integrate the HRD programs with the goals and strategies of their 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.<sup>61</sup> 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 their 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.”<sup>62</sup> 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 2014, the median salary for U.S. HRD/training executives was over \$166,000.<sup>63</sup>

## Other HRD Roles and Outputs for HRD Professionals

As organizations have adjusted to environmental challenges, the roles played by HRD professionals have changed as well. HRD professionals perform many distinct roles, nine of which are described below.<sup>64</sup> These roles are more likely than not 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.<sup>65</sup>

Some popular HRD jobs include instructional designer, technology trainer, change agent, executive coach, and “multimedia master.”<sup>66</sup> For an example of a recent job posting for a technology trainer, see the Job Posting for a Technology Trainer box.

## Certification and Education for HRD Professionals

One indication of the growth of the HRD field is the push for professional certification.<sup>67</sup> To increase the credibility of the HRD field, ASTD (ATD) began a certification program in 2006, based upon the competencies identified in its recent “Mapping the Future” study (and shown in Figure 1.5).<sup>68</sup> This certification is called the Certified Professional in Learning and Performance™ (or CPLP™), and is offered by the ATD Certification Institute. It includes both a 150-item multiple choice test and the submission of a “work product.” Individuals must have at least five years of industry-related experience before they take the exam. Further information can be found at the ASTD/ATD website.<sup>69</sup>

For the field of human resource management in general, since 1976, the **Human Resource Certification Institute (HRCI)** has offered HR certifications. Three primary certifications are offered by HRCI, i.e., the Professional in Human Resources (PHR),

### Job Posting for a Technology Trainer

#### Consider the following online job posting:

Seeking candidates for technology trainer positions. Each trainer will be responsible for a specific site. These individuals will be responsible for conducting needs analysis to identify training needs and design materials for new technologies. If you are looking for a new opportunity in a growing company then this is the role for you!

#### Responsibilities:

- Evaluate the needs of users within the company and plan the technology training programs accordingly.

- Plan with the training manager to create classroom training, electronic learning, multimedia programs, and other computer-aided instructional technologies.
- Coordinating and creating training materials and coursework for users; ensuring users receive the proper training and techniques to perform their daily functions utilizing the applications provided by the technology department.

SOURCE: The Select Group (2014). Accessed on January 2, 2015 at: <http://www.selectgroup.com/hot-jobs/?uid=6789>.

Senior Professional in Human Resources (SPHR), and Global Professional in Human Resources (GPHR) examinations. The PHR and SPHR examinations both consist of 175 multiple-choice items that cover various HRM topics.<sup>70</sup> Eighteen percent of both PHR and SPHR examinations cover human resource development. The GPHR examination consists of 165 items, with 22 percent of them 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. Since 2011, students without the required work experience cannot sit for the PHR exam (prior to this, students could take the exam, and then had five years to obtain the relevant work experience). As of December, 2014, over 135,000 HR professionals have been certified with either the PHR, SPHR, or GPHR designations (PHR: 77,408; SPHR: 53,577; GPHR: 1,730).<sup>71</sup>

In September, 2014, SHRM announced that it will begin offering two new competency-based certification exams, which are designated the SHRM Certified Professional, and the SHRM Senior Certified Professional.<sup>72</sup> Similar to the ATD approach, these new exams are competency-based, and linked to a SHRM competency model.<sup>73</sup> These new 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. This change has led to considerable confusion and controversy.<sup>74</sup>

Over the past twenty-five years, the HRD profession has become better connected to and involved with the academic community. Three developments illustrate this relationship: (1) ASTD 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) Another organization was formed in 1993, the Academy of Human Resource Development (AHRD), to further advance scholarly research concerning human resource development issues.<sup>75</sup>

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. 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.<sup>76</sup> Some psychology departments offer degree programs and courses in industrial and organizational (I/O) psychology and personnel 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 education, and organization development.

Another way HRD professionals can keep current is to examine the practices of leading organizations. ASTD established a Benchmarking Forum for the purpose of identifying and learning about best practices among member organizations so that they can be adopted by other organizations. The benchmarking process involves a questionnaire that “helps to define the focus, criteria, and context for practices, and provides information about the incidents that led to adopting the practices.” The best practices organizations are selected at a biannual meeting of what is now called the ATD Forum. These organizations and a description of their practices are published in ATD reports and highlighted in the professional journal *TD* (formerly *Training & Development*).<sup>77</sup>

## CHALLENGES TO ORGANIZATIONS AND TO HRD PROFESSIONALS

Many challenges face organizations today. The ASTD-sponsored study mentioned earlier presents eight emerging workplace trends that impact HRD.<sup>78</sup> These trends are depicted in Figure 1.6. Along the same lines, Michael Hitt and his colleagues have identified increasing globalization and the technological revolution (in particular, the Internet) as two primary factors that make for a new competitive landscape.<sup>79</sup> 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 currently facing the field of HRD are presented. These challenges include: (1) competing in a global economy, (2) eliminating the skills gap, (3) increasing workforce diversity, (4) meeting the need for lifelong individual learning, (5) facilitating organizational learning, and (6) addressing ethical issues and dilemmas in a proactive and effective 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.

### Competing in a Turbulent Global Economy

As companies increasingly compete in a turbulent global economy, many are introducing new technologies that require better-educated and trained workers.<sup>80</sup> 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 will institute quality

**FIGURE 1.6** Emerging 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: Based on K. Colterayahn, & P. Davis (2004). Eight trends you need to know. *T&D*, 58(1), January, 28–36; Neirotti, 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.

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.<sup>81</sup> Developing managers into global leaders has been identified as a major challenge for organizations.<sup>82</sup> Developing globally competent managers will be discussed in more detail in Chapter 13.<sup>83</sup> As one example, TRW revised their leadership development program to focus on global leadership issues. They used a combination of classroom and “in-the-field” action learning to prepare their future leaders to more effectively deal with their global operations.<sup>84</sup> Additionally, employers are implementing new ways of managing their employees. Approaches to managing change will be discussed in Chapter 14.

## Addressing the Skills Gap

As just mentioned, 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 in need of considerable reform. Almost 30 percent of today’s high school students fail to graduate, and employers must confront the fact that many young adults entering the workforce are unable to meet current job requirements. Even though the United States has one of the highest standards of living in the world, the Upjohn Institute for Employment Research reports that between 25 and 40 percent of hourly employees have some basic skills deficiency.<sup>85</sup>

This skills gap poses serious consequences for organizations.<sup>86</sup> How can trainees learn how to operate new equipment if they cannot read and comprehend operating manuals? Furthermore, how can new employees be taught to manipulate computer-controlled machines if they do not understand basic math?<sup>87</sup>

Obviously, the business community has a vested interest in education reform. There are some encouraging signs, however. For example, the Los Angeles public school system is offering a guarantee to employers, stating that if any high school graduate is found to be deficient in basic skills, such as computation and writing, the school system will retrain the graduate at no cost to the employer.

Other industrialized nations have made systematic changes in order to bridge the skills gap. For example, Japan and Germany, two of the United States’ biggest competitors, have educational systems that do a better job of teaching 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.

## Increasing Workforce Diversity

The workforce has become increasingly more diverse, and this trend toward diversity will continue.<sup>88</sup> This includes increasing diversity along racial, ethnic, and gender lines, as well as an increasing percentage of the workforce that is over age 55.<sup>89</sup> Effectively managing diversity has been identified as one of five distinguishing features of organizations that make it onto *Fortune* magazine’s list of 100 Best Companies.<sup>90</sup> Recent research found that organizations that win diversity awards see a short-term increase in their stock share price.<sup>91</sup> Diversity 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 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!

## 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.<sup>92</sup> 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 semiskilled workers, it may involve more rudimentary skills training to help them build their competencies. To 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. To 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 kinds of employees. One way that organizations are meeting this challenge is by establishing multimedia learning centers (sometimes on the organization's intranet). 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, author of the book *The Fifth Discipline*, have recognized that if organizations are going to make fundamental changes, they must be able to learn, adapt, and change.<sup>93</sup> A survey of HRD executives reported that 94 percent of the respondents felt that it is important for an organization to become a **learning organization**.<sup>94</sup> 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.<sup>95</sup> 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 recent flood of business scandals pose troubling questions for organizations, government, society, business education, and human resource development.<sup>96</sup> 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)?<sup>97</sup> What can business education do to promote an understanding of ethics, ethical behavior, and integrity among students and graduates?<sup>98</sup>

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, particularly in the past decade. These include a 17-page report, “Standards on Ethics and Integrity,” produced by a sub-committee of the Academy of Human Resource Development.<sup>99</sup> There are useful writings on the subject by Timothy Hatcher, as well as other work addressing difficult issues concerning the possibility of a global *HRD Code of Ethics*.<sup>100</sup> These ethical issues will be addressed at various points throughout the chapters.

## A FRAMEWORK FOR THE HRD PROCESS

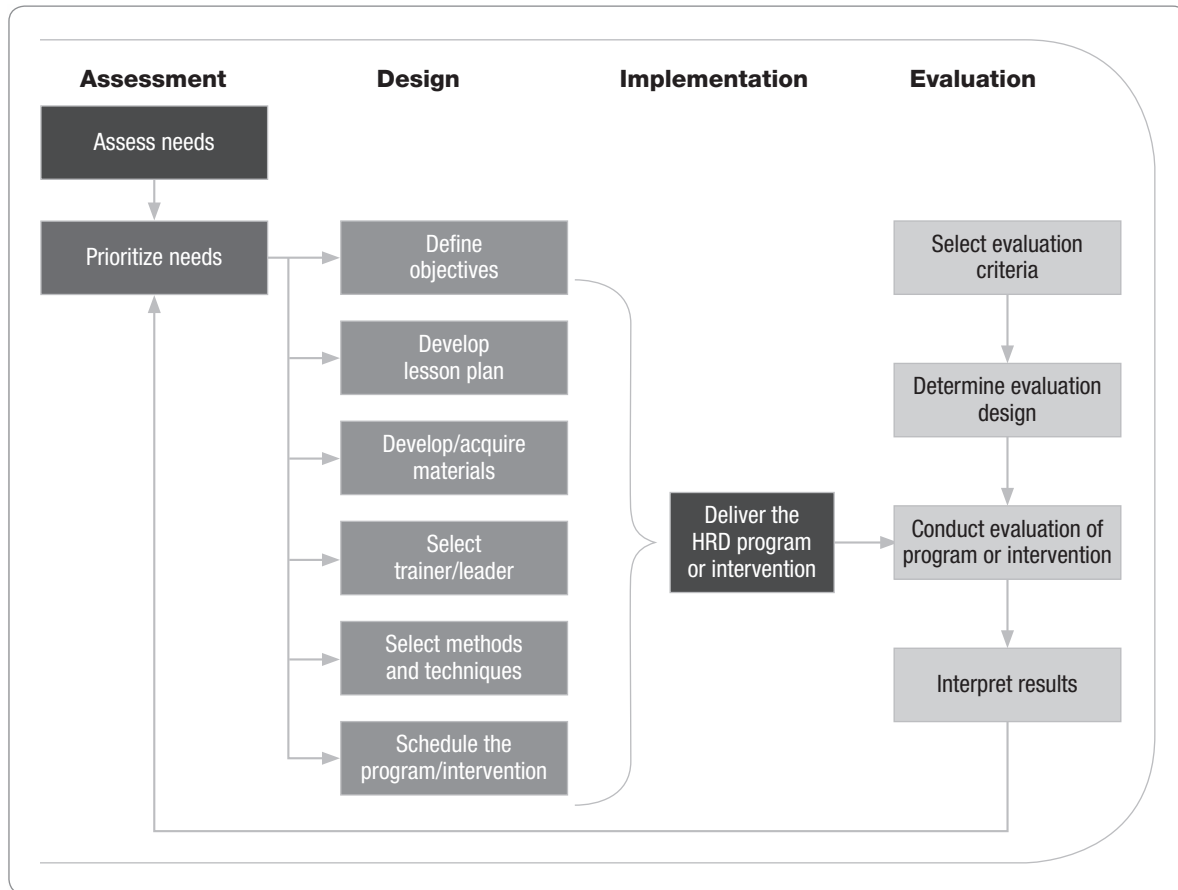
HRD programs and interventions can be used to address a wide range of issues and problems in an organization. They are used to orient and socialize new employees into the organization, provide skills and knowledge, and help individuals and groups become more effective. To ensure that these goals are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

### 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 November 19, 2014 at: <http://www.astd.org/About/Mission-and-Vision>

**FIGURE 1.7** Training and HRD Process Model.

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 DImE” 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 1.7).<sup>101</sup>

## 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). For example, the Equal Employment Opportunity Commission (EEOC) sued Dart Energy Corp., and two related companies, in Wyoming. The EEOC alleged race and national origin harassment and retaliation against Hispanic, Black, and Native American employees in these companies. The suit ended with a federal judge in December 2014 awarding \$1.2 million to more than 12 current and former employees, requiring the companies to provide extensive employment discrimination training, and the monitoring of harassment,

discrimination, and retaliation issues for three years.<sup>102</sup> Identifying needs involves examining an 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, Microsoft® PowerPoint® 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 lead time to notify potential participants, program length and location, covering participants' regular job duties, and 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 (and 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 reaction.<sup>103</sup> 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 1.7 and provide the heart or main 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



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interventions based on the information obtained from the needs assessment. Activities discussed in this chapter include establishing program objectives and content, selecting a trainer, HRD methods and media, and 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 added to 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!<sup>104</sup> Selected HRD topics and methods are addressed in Part 3. These topics line up well with both the old and new learning wheels described earlier in the chapter.

Chapters 8, 9, 10, 11, and 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 as an employee development process and explains how supervisors and line managers can successfully fulfill their critical coaching 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 the challenges organizations face as the workforce becomes increasingly diverse, 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, some day hope to do so, or simply want to learn more about HRD, you will be impacted by the topics discussed.<sup>105</sup> 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 professor or instructor will add her or his 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!

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### Return to Opening Case

Like almost all organizations in the past decade, 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 they faced have been mentioned in this chapter. Your instructor has additional information concerning what was done at K-Bank to develop employees and managers throughout the organization.

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## 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 as they are known today 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