



# **The Importance of Training and Development in the Workplace**

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A career executive in the organization management field, Louise provides management of and training to professional societies, trade associations, and foundations as well as various sized Chambers of Commerce. She coaches and mentors organization executives and staffs as well as leaders in business, government and academia.

As a PhD scholar in Capella University's School of Public Service Leadership, Louise is working on her Doctorate in Organizational Leadership with an emphasis in nonprofit leadership. Her dissertation topic is:

*To what extent do characteristics of the relationship between the CEO and the board chair impact the nonprofit organization?*

Louise has three decades of experience as an organization executive – as a staff professional and as the head of one of the west coast's top association management firms. For the past twenty years, she has led The Leadership Center and its predecessor, the MacWalters Company (a California-based corporation).

Louise is an experienced CEO and troubleshooter. On behalf of her clients, she provides management reviews, strategic visioning, board of directors training and staff training.

She is a national communications award winner, a successful advocate for nonprofit groups, and a change agent that has performed a number of high profile organization turn-arounds.

She has presented to, trained and advised some of the most prestigious non-profit, governmental, educational and business organizations.

Louise holds a Master's degree in Management, a Bachelor of Science degree in Legal Studies and an Associate of Applied Science degree in Legal Studies -- all from National American University.



## William R. Griffin

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Bill is Vice President and minority owner of The Leadership Center. For the past decade, Bill has worked in higher education as a manager and instructor -- he teaches courses in business, management, law, math and science. He has been executive director of a national trade association, and has served on boards of directors of nonprofit organizations. Currently he divides his time between The Leadership Center and teaching at four universities.

Bill's education includes a Juris Doctor, MS in Management, MS in Environmental Engineering, and BS in Civil Engineering. He has strong analytical and writing skills, and he has a reputation as a producer and a communicator. On behalf of small businesses, he has provided business plans, market analyses, valuation analyses, regulatory analyses, and other services. He conducted a survey to determine the economic impact of higher education in western South Dakota.

He has extensive experience in sales and marketing for professional services firms, especially proposal writing. He worked in industry and government for three decades. As an environmental engineer and regulatory lawyer with many years in the energy industry, he has strong skills in sustainability.

Bill's experience includes:

- Leader of the regulatory compliance effort on the nation's largest construction project
- Manager of engineering subcontractor teams as large as 350 people
- Manager role in over 100 technical services projects
- Worker on over 200 proposals for professional services contracts (win rate above 50%)
- Technical writer, editor, and book project manager
- Manager during the launch of new organizations (Sales Manager, Project Manager, VP)
- VP, General Counsel and Corporate Secretary of a successful startup firm
- Experience with governance and corporate boards
- Business consultant to small companies
- Leader of graduate and undergraduate programs in business and management
- Executive Director and organizer of a new, national trade association
- Founder of the Center for Business and Economics, a regional "think tank"

### ABSTRACT

This paper examines various aspects of learning. It discusses justifications for organizational learning programs. It outlines various ways in which an organization can structure its learning programs. It details several modes of delivery for learning programs. It recommends a variety of staff training programs. It recommends that organizations implement a development plan for each employee. It provides an example of a career development plan for an employee.

*Keywords:* training, development, education, learning

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## Introduction

Responding to employees' need for on-going learning is a prudent investment of an organization's resources and funds. Unfortunately, all too often, the organization is jam-packed with other priorities, so learning is relegated to the back seat. Whether you use the terms "training," "development," or "education," they all mean *learning*.

In the for-profit world, most organizations realize the importance of training and development. They are motivated by many factors: competitiveness, need for efficiency, need for quality, desire to avoid litigation, and others.

In many ways, non-profit organizations are similar to for-profit organizations, but when it comes to training, they can be worlds apart. Many non-profit organizations have an over-abundance of program and administrative demands, but on the operational side, there are few (if any) discretionary dollars -- particularly when it comes to training. This, unfortunately, was true in almost every non-profit organization with which I worked. None had formal training programs. At best, training occurred on an ad hoc basis as a need or a crisis arose.

This paper will discuss several points. Training, development and education can be grouped under an umbrella term, 'learning.' Learning programs help individuals grow better skills. Thus, it is a wise investment for organizations to establish learning programs. There are many ways that an organization can structure its learning program. Several modes of delivery can be used by an organization to implement its learning program. HR specialists play an integral role in establishment of the organization's learning policy. They determine the type of learning needed, select the mode for delivering it, deliver of the training and development modules, and store training records.

## Learning: The Umbrella Concept

In his article "~~Learning and Training: Developing the Competent Learner,~~"<sup>2</sup> D. Robotham suggests grouping training, development, and education under the umbrella of 'learning.' "A focus on learning in an organizational context, rather than separate activities of training, development and education, seems best to this [learning] process" (2003, Robotham).

How, then can organizations develop a learning program if there is currently nothing in place? Trevor Clawson advances the idea that an organization's human resources department should build the case and champion it to top management. "Too many HR and learning managers are fearful of doing that, but you really do need to go to the top... Once you have

married staff development to a specific goal, the theory goes, it becomes a lot easier to demonstrate a return on investment” (2004, Clawson).

### **Hazards of Inadequate Training**

The following is but one example of the impact of inadequate training: the office photocopier. Every office has one, and many sad tales go along with it. An organization with which I was associated had one photocopy machine. It was an extremely sophisticated piece of equipment. It performed many functions including collating, duplexing, stapling, and copying various sizes of documents onto various sizes and colors of paper stock. With all that sophistication came sensitivity (i.e., fragility). There was no central duplicating staff for this organization. Rather, it was the custom that all staff members made their own copies; however, none of them received training. Invariably, this sensitive machine would jam up ten minutes before a committee meeting was to begin. Since no one had received training on how to unjam the copier, several staffers would congregate at the machine, offering suggestions (and, frankly, getting in the way). This was neither a good use of staff time nor a professional way to function.

Frequently throughout my career, similar scenarios occurred – scenarios that would have been easily avoided if training had been part of the organizational fabric. About the value of organizational training, David Robotham of the Leicester Business School of De Montfort University opines, “Effective learning needs to achieve transference of knowledge from the artificiality of a training course, to practical application where the trainee adapts acquired knowledge to the perceived needs of a particular problem or situation” (2003, Robotham).

### **Approaches to Organizing the Training and Development Function**

There are many ways that an organization can meet its training and development needs. Some organizations centralize the function, often by locating it within the HR department. In this mode, HR professionals who have a specialty in training and development provide all training to all company employees. Other organizations centralize the training function, but they locate it in a training department that does not report to HR.

Some organizations decentralize portions of the training and development function. They may use their HR or training department to provide centralized training on administrative procedures (e.g., how to prepare an employee expense report) and policies (e.g., manager training on sexual harassment). Meanwhile, the organization will provide ‘technical’ training on

a decentralized basis. For example, if a young attorney is hired into a law firm, most of the training they receive is on-the-job training provided by their first-line supervisor, usually a senior attorney.

One of the questions to be answered is ‘Who should train?’ It depends on the circumstances. It is important to understand that the trainer does not always have to be a human resources specialist.

Whether training is organized in a centralized or decentralized mode, it is desirable, and sometimes a legal requirement, to maintain records of employee training. In turn, it is usually desirable to have the training records kept in a centralized mode. A commonly used approach is to have someone in the HR department maintain these records, because training records are usually made a part of the employee’s file (which the HR department maintains for each employee).

Where does HR management fit into this equation? Essentially, does HR have a low-level, staff role, or does HR have a high-level, strategic role? Jorge Rufat-Latre discusses the evolution of human resources departments. “HR departments in many corporations have come to be little more than service providers – offering basic training and rewarding performance based on formulas created out of a cookie-cutter process” (2005, Rufat-Latre). Conversely, it is my opinion that HR should play a high-level, strategic role. If an organization’s learning function is not working optimally, HR should “lead the charge” to remedy the deficiencies. This should include the following efforts by HR.

- Communicate with top management and explain the deficiencies
- Recommend policies for learning. Essentially, HR should develop a vision statement for the organization’s learning function.
- Recommend a structure for the organization’s learning function. Determine what groups will have what responsibilities.?
- Recommend a list of topics for which training and development are needed
- Recommend a delivery mode for each topic
- Establish a centralized system for capturing and storing training records
- On an ongoing basis, HR should be the ‘champion’ or ‘advocate’ for the organization’s learning program.

**Example of a Remedial Effort**

With regard to the scenario about the photocopier, the organization could have avoided much heartburn simply by setting aside blocks of staff time specifically for training. Every staff member should have been required to attend the sessions. The trainer could be a sales or servicing representative from the equipment supplier whose responsibility it is to show the entire staff how to operate the equipment. An alternative is for the equipment supplier to train one person on the organization's staff who can then train the remaining staff members.

On a more global level, training should not be limited to the method of clearing jammed paper from the photocopier. Training should include other pieces of equipment and systems in the workplace. It should include the office's other internal procedures.

For employees reluctant or resistant to the concept of training, the organization should link participation in training programs to criteria used during staff performance evaluations.

**Modes of Delivery for Training Programs**

While conventional types of training are considered to be in-person or on-site, other training options include:

- Delivery by computer (or e-phone) using live audio/video conferencing (synchronous)
- Using a computer chat room
- Using computer CDs, DVDs, videotape, or other self-directed electronic methods (asynchronous)
- Using written materials (programmed learning, procedure manuals)
- Or, a combination of the above

“If an organization already has the aspirations, the skills and the attention focused on knowledge, technology will facilitate the access to that knowledge, and pave the way for the suitable knowledge to reach the right person in the right moment” (2004, Gasco, Llopis, and Gonzalez).

**Recommended Training Plan: Type, Who, Justification**

Table 1 suggests various subjects that are appropriate for training, makes recommendations about which staffers should receive the training, and provides a justification

for the training. It is wise for organizations to provide this kind of training periodically, in some cases throughout the year.

### **Importance of Development Programs**

When a supervisor recommends that an employee participate in a particular development program (leadership or otherwise), the employee should be pleased. Why? Because the supervisor is indicating how much he/she values the employee -- enough to invest resources (money) to help the employee further develop his/her skills.

Development programs come in all shapes and sizes. In some professions, continuing education courses are required to maintain a specific professional/technical license. Examples include real estate brokers, physical therapists, financial advisers, and insurance agents. There are also occupation-specific refresher courses. Examples include association and chamber of commerce executives, diesel mechanics, travel agents, information technology people, and public relations/communications specialists. Personal self-improvement education courses are also available, and they can have a big impact on the individual in his/her work setting as well as in the family/home setting. Dale Carnegie self-improvement courses are an example. Many organizations provide tuition reimbursement for employees who attend college classes. Whatever the type, the intention of development programs is to enhance the professional performance and productivity of employees.

So how does an organization know whether its learning programs are successful? An article addressing leadership training that appeared in *HR Focus* states, "We measure success through annual performance evaluations: stability, morale, customer satisfaction, and professional development ladder." (Anonymous, 2005)

In a perfect world with no financial impediments or time constraints, all employees would receive as much training and professional development as they could consume. In the real world, however, the 'needs' of the employer, as opposed to the 'wants' of the employee, drive these kinds of training programs. It is, after all, in the best interest of the employer to provide quality education (formal or informal, personal or professional) in quantities sufficient to meet the employer's needs as well as the interests of the employee.

Table 1 **Summary of Recommendations for Staff Training**

<b>TYPE OF TRAINING</b>	<b>WHO SHOULD RECEIVE IT</b>	<b>JUSTIFICATION</b>
Office equipment (telephone system, computer hardware and software, printers, photocopiers)	All staff members	All staff members will create and produce their own material. Consequently, it is essential that all staff members have a working knowledge of the equipment they use.
Office procedures	All staff members	All staff members must understand how the office functions. This includes, but is not limited to: <ul style="list-style-type: none"> <li>• Organizational structure</li> <li>• Organizational hierarchy</li> <li>• Hours of operation</li> <li>• Reporting mechanism</li> <li>• Vacation and sick leave rules</li> <li>• Protocols for the filing system</li> </ul>
Employee safety	All staff members	All staff members must know what to do in a variety of safety/emergency situations. This includes, but is not limited to: <ul style="list-style-type: none"> <li>• Life-saving (like CPR)</li> <li>• Accidents and injuries (such as trips &amp; falls)</li> <li>• Acts of nature (like earthquakes, tornadoes, flash floods)</li> <li>• Life threats (such as terrorism)</li> </ul>
Training incidental to a particular position	Specific staff members	Each staff member has certain responsibilities related to his/her position and is expected to stay up-to-date with the industry norm as it relates to training (for example, the financial person will attend continuing education courses on changes in tax laws and accounting rules).
Leadership	Employees interested in career advancement	Employees who have leadership abilities are important long-term assets to the organization.
Succession planning and training	The next in line for the top positions (could be one person or several)	To ensure a smooth transition between an out-bound executive and his/her replacement

### **Personal Career Development Plan**

A prudent organization will have a policy mandating that each employee have his/her own personal development plan. Some people in the trade refer to these as “Five-Year Plans.” The HR department should be involved in implementing this policy. What should an individual’s personal career development plan look like? To provide an example, I have prepared one for myself.

#### **CAREER DEVELOPMENT PLAN FOR M. LOUISE WALTERS**

(prepared Spring 2011)

At the end of the spring academic quarter, 2011, I will have completed one-half of the courses necessary to earn my Master of Management (MM) degree from National American University in Rapid City, SD. In May 2012, I will complete my MM degree. In the autumn of 2012, I will continue my education by beginning work on a Doctorate in:

- Leadership development
- Organization development
- Organizational behavior
- Or other program that fits my background and interests

Because my career has been in organization management (for 25 years, I have provided leadership training, executive searches, strategic planning, and day-to-day management for local, state, and national non-profit groups of all sizes), my initial research indicates any of these academic areas will be a good fit. I expect it will take four years to earn my Doctorate (by 2016).

There are four major opportunities where my Doctorate will be useful:

1. Non-Profit Organizations – Regardless of the type of non-profit group (whether it is a trade association like a local chamber of commerce, or a professional society like a statewide professional development group), findings of my doctoral research will enable me to work with organization staffs and volunteer leaders to better understand the roles they play, better assess the impacts they have, and to better understand the organizational,

societal and political environments in which they exist. In the capacity of a manager or contractor, I will help them look to the future and chart specific courses of action.

2. For-Profit Organizations -- Boards of Directors that govern non-profit organizations are comprised primarily of volunteers who have 'day jobs' in corporate America. I will leverage the increased visibility resulting from my work for non-profit groups to introduce myself (and my suite of contract management services) to corporations, businesses, and other for-profit organizations.
3. Book – I am currently conducting research based on surveys and interviews that I believe will provide some of the foundation for my PhD research. Data are being collected from community leaders, business people, government employees and non-profit association executives. The data will be analyzed to identify current and future trends in businesses and organizations. I would like to compile the results of this research into a book.
4. Teaching – I would enjoy teaching in a university setting. My decades of work experience, coupled with my Doctorate, will position me to be effective in the classroom.

## Conclusions

Learning is a life-long journey.

- 'Learning' is an umbrella term that includes worker training, development, and education.
- Learning is the engine that powers organizations and enables personnel to grow and flourish.
- Learning is a wise investment by for-profit and non-profit organizations.
- There are many ways that an organization can structure its learning functions.
- An organization can take advantage of many modes of delivery for its learning function.
- The HR organization plays an integral role in: establishing the organization's learning policy, designing a structure for the learning program, determining the learning topics to be included, selecting the mode for delivery of each topic, delivery of the learning modules, and storing training records.

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