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RESOURCE MANAGEMENT

Southwood School: A Case Study in Training and Development

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This resource is designed to promote learning in the area of training and development.

Case Overview

This fictionalized case study is based on a real organization. The case is set in a school, but many of the issues raised are the same across different countries and sectors (for example, the tension between the school's professional staff members and support staff members). The case study's author was the organization's HR manager when the events took place in 2004-05.

Additional information about the school:

Industry: UK public sector, education
                  (a mixed comprehensive secondary school).

Size: The annual revenue of the organization is in excess of £1 million.
                  It is a nonprofit organization (it is government-funded).

Staff: 120 (80 teaching and 40 non-teaching).

Student Body: 800 students aged 13-18.

Student Learning Objectives

- To identify the components of an effective training program.

- To understand what needs to be considered when designing a training program.

- To compare the soft and hard skills required by the appraisers and appraisees in this case study.

- To identify the vital role of appraisees in an effective performance management program.

- To effectively evaluate a training program.

Use of These Resources

The resources provided for this case study are designed so instructors can use a combination of the activities. It is recommended that instructors present the PowerPoint material first before students read the actual case study. Additional "key points" are included in the Notes section of the presentation.

Time Needed to Complete the Case Study

The presentation should take about 20 minutes to deliver, with some additional time required if students have questions. Students will need approximately 15-20 minutes to read the case study.

The instructor can choose which activities (in Part B) are most appropriate for their group. The following times are suggested for each of the activities:

Discussion Questions	Allow 20 minutes for each discussion question. The instructor can divide the class into groups and ask them respond to specific questions or respond to the questions as a class.
Group Tasks	These activities are more advanced. Each activity will require 30-45 minutes to complete. More time should be allowed if results will be presented to the full class. Students should work together in teams.
Extension Tasks	These tasks encourage students to think about the issues in more depth. They can be assigned as homework or independent study and should take between 20-30 minutes to complete.

Sample answers are provided for all student tasks, highlighting key areas students should identify through their work.

Accompanying Resources

PowerPoint Presentation	This presentation introduces the case study. Instructor's notes are included.
Case Study Narrative	Students should read this narrative before they undertake any of the activities.
Teaching Notes for Student Activities	Detailed notes are provided for each activity. There are more than 20 activities included in this exercise. The activities are separated into three types: discussion questions, group tasks and extension tasks. The instructor can choose which combination of activities to use.
Possible Responses to Questions– Student Activities	Possible responses to the activities are provided. The instructor can use this document as the basis for feedback to students' responses.
Sample Training Program Schedules	Examples of two training schedules are included and are used for one of the activities where students are asked to analyze each session's strengths and weaknesses.
Training Evaluation Form	Students are asked to analyze an actual training evaluation form as one of their discussion questions.
Appraisee Training Program Agenda	This document provides a more detailed overview of what an appraisee training program could include. This helps students understand how agendas are used in the business world.

Bibliography/Additional Reading

Please note that the main text for this case study (referenced in the presentation) is Dessler's *Human Resource Management*. It is required reading to successfully complete the case.

Books

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Case Study Narrative

Introduction

Southwood school administrators realized that a newly designed performance management system for their support staff[1] would require a formal training program. Designing and implementing the new performance management system was a challenge for the organization; the last system was unpopular with employees, and negative feelings about the value of performance management linger.

Case Overview

As discussed in the first Southwood case study, some of the issues identified with the previous performance management system included:

■ Annual deadlines to complete the process were missed by many staff members.

■ Some staff members were confused about what exactly needed to be completed and when.

■ There were complaints that the previous system was a "waste of time" and that there were no measurable outputs.

■ A trade union representative felt the system was not appropriate for all staff members.

■ Criteria on the forms were irrelevant to support staff. For example, support staff could not set objectives in pupil progress or have lessons observed.

■ There was little attention on identifying training needs, and where needs had been identified, there was no follow-up with appropriate actions.

■ Appraisals were led by teachers with little knowledge of their appraisees' jobs.

■ Performance meetings were a one-way process; often, performance goals were identified before the meeting and without the appraisee's input.

A new system was designed in consultation with all stakeholders to address the issues raised with the previous system. School leaders felt that a formal training program was vital to ensure all employees supported the new system. This case study demonstrates how the training was designed and delivered and some of the complexities involved in this process.

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1. Examples of support staff jobs include: administrative positions (secretaries, administrators); student support positions (learning mentors, learning support assistants, special needs assistants, computer technicians); teacher support positions (teaching assistants, departmental assistants such as science technicians); and strategic/management positions (HR manager, finance manager, director of administration, director of information technology).

The case study consists of two parts:

I.   Designing the training program for managers (appraisers).
II.   Designing the training program for appraisees.

I. DESIGNING THE TRAINING PROGRAM FOR MANAGERS (APPRAISERS).

The managers in this case study are the appraisers in the new performance management process. In some cases, they will be teachers with no formal management qualifications. In other cases, they will be support staff with specific management responsibilities in the organization.

Needs Analysis

Initially, the director of administration recommended that a selection of managers complete a standard Internet-based training program provided by an online training organization. Managers who completed the online training would receive a certificate of achievement. Based on input from the HR manager, however, it was decided that a custom-designed program would be more appropriate because it would better meet managers' needs. A custom-designed program would also allow the school to relate the training back to their new performance management system and provide flexibility in the program's delivery.

There were a number of options available to determine who would design and deliver the program:

- The HR manager could design and deliver the training.

- The HR manager could design the content, and the training could be conducted by a member of the school's senior management team.

- An external consultant could design and deliver the training.

- An external consultant could design the content, and the HR manager could conduct the training.

In the end, it was decided that the HR manager would design and develop the program with support from the senior management team, if necessary. The reasons for this decision:

- **Specialized knowledge.** The HR manager had developed the new performance management system and was therefore the most knowledgeable about it.

- **Experience.** The HR manager was experienced in developing training programs.

- **Cost.** This was the least expensive option; no direct costs would be incurred.

- **Context.** It would be easier to include specifics about the new performance management system if the training was designed by an internal person.

- **Flexibility.** The sessions could be run at the times convenient to managers, which may have been more difficult to accommodate with an external trainer.

note **PLEASE NOTE:** From this point forward, the HR manager is referred to as the trainer.

Designing the Training

A focus group was held with five managers to find out what they wanted from the training and to assess their concerns about performance management. This was a useful process. The managers wanted to include training in how to deal with difficult people, which otherwise may not have been included in the program. Including this also assured managers that their views were important and had been considered in the program's design.

The training would take place in-house and outside the normal workday. It was agreed that the most appropriate method was a two-hour workshop. The workshop would include various activities geared to develop the skills and knowledge of the participants:

- Trainer-led interactive presentations.
- Role play exercises.
- Use of a specially designed case study.
- Small-group exercises.

By developing and delivering the session in-house, training materials specific to the new performance management system could be created, rather than relying on generic training materials. It was hoped that this would facilitate the transfer from training to the workplace. The training would be mandatory for all appraisers to ensure consistency. The trainer developed a plan for the two-hour session and included activities that would appeal to participants of various learning styles. Appropriate resources and handouts were designed. The trainer used the organization's generic training evaluation form (provided at the end of this workbook) to evaluate the program.

The program would include the following:

- How to develop questioning and listening skills.
- How to complete the new performance management documents.
- How to develop SMART objectives (objectives that are specific, measurable, achievable, relevant and time-bound).
- How to help employees identify training and development opportunities.

Training Delivery

Participants were asked to read all the documents related to the new performance management system before the training. The session was held in a classroom with the necessary IT equipment during non-school hours. Eighty percent of appraisers attended this scheduled session; the remaining 20 percent participated in another presentation four weeks later.

Evaluation of the Training Program: The Trainer's Perspective

The following is an excerpt from the trainer's evaluation report:

....

Overall, I thought the session went really well. I covered all of the materials and had some good responses.

I think most of the participants now have a good understanding of how to carry out a performance review, but I am not entirely sure they believe there are benefits to a performance appraisal system.

I was a bit disappointed with two participants who did not actively participate in the activities. Perhaps they thought they already knew the information.

I might have misjudged one of the communication activities. I estimated that it would take about 45 minutes, but everyone completed it in 20 minutes. Unfortunately I didn't have any extra activities, so I had to stretch out the final discussion so we didn't finish too early.

....

Evaluation of the Training Program: The Managers' Perspective

Managers were asked to provide feedback at the end of the training. Some of the results are shown below:

How would you rate the…	Percentage who rated it as good/very good
Quality of materials	78%
Knowledge of trainer	90%
Presentation skills of trainer	70%
Location of training event	50%
Duration of event	85%
Rate the following statements:	**Percentage who rated it as agree/strongly agree**
The session met the stated objectives.	78%
I feel confident in leading performance reviews with members of my team.	80%
The training methods used were appropriate.	60%

Qualitative feedback was also offered:

- "The trainer was very good and was clearly knowledgeable about the subject."

- "I found the practical tips to be really useful."

- "It was a bit annoying when the administrators kept interrupting us to pass on messages."

- "It would have been easier if everyone had read the new performance management documents before they arrived at the session."

- "Some of the activities were a bit too childish – I think the trainer forgot that we are all teachers."

- "Some of the handouts are really good."

- "I am still not convinced that performance management is something which benefits us – it seems like another paper exercise."

II. DESIGNING THE TRAINING PROGRAM FOR APPRAISEES

Needs Analysis

The HR manager was assigned responsibility for this program because of the successful design and delivery of the manager's training. This session was internally led, for the same reasons the manager's training was internally led.

Past experience showed that it was difficult to hold focus groups with support staff members. Instead, an e-mail was sent to all support staff asking them what they wanted to be included in their training program. Less than 10 percent of the support staff responded to the e-mail.

The following instructional methods were chosen for this program based on experience with previous training programs (see "Sample Training Program Schedules"):

- Presentations by trainer
- Practical activities
- Role plays
- Worksheets

Training Delivery

The appraisees were not assigned pre-work before the training because this may have intimidated some participants. Although details of the new performance management system had been shared with appraisees in an earlier e-mail, most participants had not seen the actual documents that would be used. The documents were distributed during the session so the trainer could guide them through and answer any questions immediately.

The session was held in a school classroom, but was scheduled outside of normal working hours (see "Appraisee Training Program Agenda") to avoid disrupting staff and students during the normal school day. To compensate for the inconvenience, attendees received overtime for the two hours spent in the training.

Training Program Evaluation

The trainer ran out of time during training. Consequently, no formal evaluations were submitted by participants. The trainer thought it had been a challenging session; it had been difficult to engage the participants. The participants had very different needs and it was difficult to accommodate them within a two-hour session.

The trainer also reported that few trainees participated in the activities or asked any questions.

Conclusions

This case study shows that there are many issues to consider when planning, designing and delivering training programs. It is also clear that because people have different needs and learning styles, it is difficult to produce a program that will be rated well by everyone. In this instance, it was harder to satisfy people because of the topic; negative experiences with the school's previous performance management system made this training unpopular.

Teaching Notes for Student Activities

PART A

1. **Deliver the PowerPoint presentation on training and development at Southwood School.** This may be formally presented in class or students could be asked to read the presentation slides independently.

2. **Have students read the Southwood School case study narrative and underline any unfamiliar terms.** These should be defined in class. Some anticipated terms and definitions are provided to be sure students have a clear understanding.

PART B

Once students read the case study documents, select from the following activities (based on which ones are most appropriate for your audience).

3. **Discussion Questions**

These questions are suitable for independent work, small groups or a class-wide discussion.

   3.1.   Would it be appropriate to use e-learning to deliver the performance management training? Explain your answer.

   3.2.   What are the potential barriers to a successful training session? Outline how you might overcome them.

   3.3.   Discuss the advantages and disadvantages of the training sessions being led by an external consultant.

   3.4.   How would you deal with a participant with a negative attitude toward the training?

   3.5.   In the information provided in the case study, do you see any evidence that the trainer considered Dessler's "Five-Step Training and Development Process" in the manager's training program? Explain your answer. Required reading. See page 3.

3.6. Would you require any information about your participants before the training session?

3.7. What skills do you think are important for the trainer to have?

3.8. Do you think it is possible for learners to obtain the necessary information using a more informal or experiential learning technique?

3.9. How can the trainer ensure skills transfer so employees apply the training to the workplace?

3.10. How can the trainer motivate the participants to learn?

3.11. How would you evaluate the success of the training program (not including the end-of-session feedback forms)?

3.12. How would you rate Southwood's existing evaluation form?

3.13. Why is it important for appraisees to be trained in using the new performance management system?

4. **Group Tasks**

These activities work well when students work in teams. Students could present their responses to the class for tasks 4.1., 4.3 and 4.4.

4.1. Design an opening presentation for the training session which includes session goals and objectives.

4.2. From the perspective of the trainer, describe how you would incorporate the participating managers' feedback (as detailed in the case study) into future programs.

4.3. Look at the sample training program schedules and answer the following questions:

4.3.1. How would you rate **the appraisee's training program** on a scale of 1 to 10, where 1 is very poor and 10 is excellent? Explain your reasons for this rating.

4.3.2. How would you rate **the manager's training program** on a scale of 1 to 10, where 1 is very poor and 10 is excellent? Explain your reasons for this rating.

4.3.3. Complete the table on the following page showing the strengths and weaknesses for each program.

	Strengths	Weaknesses
Manager's Training Program	▪ ▪ ▪ ▪	▪ ▪ ▪ ▪
Appraisee's Training Program	▪ ▪ ▪ ▪	▪ ▪ ▪ ▪

    4.3.4.   Discuss how a new program could be designed to address the weaknesses identified in the previous question.

  4.4.   Write an overview of the appraisee's training program. Use the questions below to help structure the outline:

- Who will deliver the training?

- How long would the session(s) last?

- What are the key areas to cover?

- Can you use any of the same areas from the manager's training program?

- What are the key differences between a session suitable for managers and one geared toward employees?

- How would you allocate time for the different activities during the training?

- If you split the session into two parts, how would you divide the content between the two sessions?

  4.5.   Considering your answer to the previous set of questions, how would you rate the proposed appraisee program?

  4.6.   Design an evaluation form that could be completed by participants at the end of the training program.

5. **Extension Tasks**

These tasks are suitable for undergraduate students who would like to further develop their knowledge and skills in this area. They could also be used as independent learning or homework activities.

  5.1.   Discuss how your proposed training program could be adapted to meet different learning styles.

  5.2.   Describe what you would cover if you were asked to provide a shortened (one-hour workshop) version of the program for three managers.

  5.3.   Make a list of top ten tips for preparing a training event and ask for feedback from one of your fellow students.

5.4.   Design criteria that could be used to select an external trainer.

5.5.   Provide a report to the director of administration for the business case to provide more training in people management issues for non-HR specialists.

5.6.   As part of the training evaluation process, outline what evidence could be gathered to measure the effect on work performance.

Possible Answers to Questions— Student Activities

Please note that these answers are indicative only, and are not intended to be exhaustive.

Question	Key areas to cover
Part B **Discussion Questions**	
3.1 **Possible** **Answer**	Would it be appropriate to use e-learning to deliver the performance management training? Explain your answer. **Pro:** There are many advantages to e-learning. It provides flexibility for learners to work at their own pace and at a time which is convenient for them. E-learning enables participants to concentrate on areas most appropriate for them and enables employers to track participants' progress. One popular design is to use a generic online course to teach fundamentals and follow up with a workshop for experiential exercises. **Con:** E-learning is not appropriate for all topic areas and should not be seen as the easy or best option in all cases. In this case study, it would not be appropriate to deliver it exclusively in this format because one of the key topics to be covered is soft skills. When dealing with soft-skill issues (such as how to have difficult conversations), it is more effective to have the personal touch of a skilled trainer. Participants also need the practical experience of taking part in simulations and role plays. A trainer-led session also enables participants to have any questions answered immediately.

What are the potential barriers to a successful training session? Outline how you might overcome them. Examples might include:

	Potential barriers	How could they be overcome?
3.2 Possible Answer	Poorly-skilled trainer.	Ensure an appropriate trainer is selected using objective criteria (see question 5.4 for a list of possible criteria).
	Unclear objectives.	Ensure the trainer sets clear objectives at the start of the session.
	Lack of time management.	Ensure the training session is well organized and that the trainer's plan shows suggested timing for each section.
	Unmotivated participants.	The trainer can use warm-up activities to motivate participants and can emphasize the benefits of participating in the training. The trainer could also ask participants to be open about their concerns so they can be addressed during training.
	Lack of flexibility.	The trainer should have a session plan which allows for flexibility, to ensure time to answer participant questions and to respond to different needs.
	Over-reliance on one training method.	Trainers should remember that participants have a variety of preferred learning styles.
	The technology breaks down and the session relied on it.	The trainer should anticipate such problems and have training materials available in a different format. For example, handouts could be provided if the PowerPoint presentation fails.
	The content is not at an appropriate level for the audience.	The trainer must receive a detailed brief explaining the purpose of the training and participants' existing skills and knowledge. The trainer should provide a variety of activities so all ability levels are accommodated.
	The content is not relevant to the organizational context.	Where possible, the trainer should make activities as relevant as possible to the organization. This includes using real organizational documents, rather than generic materials. This will help participants transfer their learning to the workplace.
	Poor training environment.	Ensure a suitable room with the necessary computer equipment is provided for the session. Ideally, it should be in a quiet location where people will not be disturbed.
	Lack of time to practice skills.	The trainer should plan a combination of activities so participants can learn the theory and then practice the skills.
	Lack of perceived relevance to workplace.	Content should be as relevant as possible to the workplace. The trainer must emphasize this to participants so they understand how to apply it when they go back to their workplace.

3.3 Possible Answer	Discuss the advantages and disadvantages of the training sessions being led by an external consultant. Advantages may include: ■ An external trainer may be more knowledgeable about the subject area. ■ An external trainer can bring experiences gained in other organizations. ■ An external trainer is less likely to be biased toward certain participants. ■ An external trainer may bring a fresh perspective (and not just the organization's view). ■ Participants may be more willing to discuss experiences and concerns with an external consultant. Disadvantages may include: ■ An external consultant may not understand the context of the organization. ■ It may be harder for an external consultant to design content at the appropriate level for the audience. ■ An external consultant may require assistance to operate the technology required for the session. ■ An external consultant may not be as familiar with the performance management documents as an internal trainer. ■ Other options may be more suitable, such as training led by either an HR director or other respected manager from the organization.
3.4 Possible Answer	How would you deal with a participant with a negative attitude toward the training? The trainer should talk with the person to identify what the problem is and find a way to resolve it. It may be that the content was not as expected or they think the training is not a good use of their time. The trainer should ensure that this person does not negatively affect the rest of the group.
3.5 Possible Answer	In the information provided in the case study, do you see any evidence that the trainer considered Dessler's "Five-Step Training and Development Process" in the manager's training program? Explain your answer. Required reading. See page 3. There is some evidence that the trainer used this model. For example: 1. **Needs analysis.** The trainer considered the skills needed for participants to complete the new performance management process and consulted with participants. This stage of the process could have been more detailed. Analysis typically provides information that feeds into the design phase. Based on the case study, not enough information is provided to gauge this. While it appears that the performance management system will be covered, techniques on how to use the system are not mentioned. Some soft-skills training will be offered, but other than conflict management, no other soft-skills topics are mentioned. 2. **Instructional design.** There is evidence that the trainer identified and organized suitable activities. The steps taken are not detailed, but would include identifying topic areas; the sequence of topic areas; topic objectives; times for each topic; learning activities; delineation of teaching methods (such as role play, lecture, etc.); and test items. 3. **Validation.** There is no evidence that the program was tested with a small group. 4. **Implementation.** The training sessions occurred. However, the administrative documents did not indicate what equipment, student-to-instructor ratio, student materials, etc., would be needed. 5. **Evaluation.** The manager's training program included time for an evaluation, but this did not happen at the end of the appraisee training session.
3.6 Possible Answer	Would you require any information about your participants before the training session? The following information would be useful for the trainer to have before the training program: ■ The average number of years managers and support staff have worked at the organization. ■ The job titles for managers and how many appraisees they will be evaluating. ■ Any special needs that will require additional support. ■ The number (if any) of managers who have received supervisory training. ■ Any previous experience participants have had with performance management (this could be achieved through a questionnaire) and their preferred learning styles.

3.7 Possible Answer	What skills do you think are important for the trainer to have? • Knowledge about the subject area. • Confidence. • Ability to handle questions effectively. • Time management skills. • Flexibility, so if part of the program is not going well, an alternative could be used. • IT skills (especially if this is a large part of the training session). • The ability to differentiate tasks depending on participant needs. • A sense of humor!
3.8 Possible Answer	Do you think it is possible for learners to obtain the necessary information using a more informal or experiential learning technique? There are many instances where informal learning can be effective for both the employee and the employer, but in this instance, this may not be the case. Because the performance management system is new, it is better for all employees to receive the same information via a formal training program to eliminate any ambiguities.
3.9 Possible Answer	How can the trainer ensure skills transfer so employees apply the training to the workplace? • The trainer should maximize the similarities between the training and work situations. This includes using actual forms and making sure that the examples provided in role plays are relevant to the work environment. • The trainer should create a learning atmosphere where participants can practice their skills until they feel confident. This will make the transition to the work less stressful. • The trainer should be realistic about potential problems that could arise so they can discuss possible coping strategies with employees.
3.10 Possible Answer	How can the trainer motivate the participants to learn? • Provide a range of activities so employees stay engaged. • Use relevant examples, case studies and role plays so employees understand how it relates to them. • Accommodate different learning styles. • The duration of this training may motivate employees because it does not place too much of a burden on their time. • Training that is delivered in a professional manner is more likely to motivate employees than training delivered with a lacklustre approach. • Outline goals and objectives at the start of the session. This gives employees a structure, and they may find the training easier to follow if they know what is going to happen next. • Reinforce how the training will benefit them.
3.11 Possible Answer	How would you evaluate the success of the training program (not including the end-of-session feedback forms)? • Employees could be contacted after three months to see if the training had a positive effect on their job. • The percentage of completed performance management reviews may be a useful performance indicator. • The trainer could seek informal feedback from participants, either face-to-face or by e-mail. If more objective evidence is needed, a sample of employees could be asked to provide anonymous feedback. • A questionnaire could be completed at the end of the performance review cycle to see if the training enabled employees to carry out their roles effectively.

3.12 Possible Answer	How would you rate Southwood's existing evaluation form? Comments might include: ▪ It is good that it is only one page. If it was more than a page, some people might not complete it. ▪ It would be useful to get more specific feedback, such as perceived strengths and weaknesses of the session. ▪ Respondents could be asked to provide examples so the trainer has a better idea about how to improve future sessions.
3.13 Possible Answer	Why is it important for appraisees to be trained in using the new performance management system? For the new system to be successful, all stakeholders must understand and commit to it. If appraisees do not understand how to complete the documentation, it will not be successful. The training reinforces the organization's commitment to performance management and shows that appraisees' needs are recognized just as much as appraisers' needs. For those employees who had negative experiences with performance appraisal before, this may reassure them that it can be a positive process.
Group Tasks	
4.1 Possible Answer	Design an opening presentation for the training session which includes session goals and objectives. The opening presentation should: ▪ Ensure that all participants understand why the organization values performance management and identify the benefits of such a program. ▪ Provide the opportunity for participants to seek clarification about any concerns they may have. ▪ Introduce communication skills that enable effective performance reviews. ▪ Share practical details about how the new system will work (for example, how the appraisers will be assigned).
4.2 Possible Answer	From the perspective of the trainer, describe how you would incorporate the participating managers' feedback (as detailed in the case study) into future programs. ▪ Obtain information about participants ahead of time so the program can be tailored to their needs. ▪ Be more responsive to the needs of the group when the session is taking place. ▪ Encourage participants to take more ownership of the session and identify areas they wish to discuss. ▪ Accept that it is nearly impossible to meet everyone's needs in a single training session.
4.3.1 Possible Answer	How would you rate **the appraisee's training program** on a scale of 1 to 10, where 1 is very poor and 10 is excellent? Explain your reasons for this rating. Students are likely to give this program a low rating (perhaps 5/10 or lower) due to the following reasons: ▪ Much of the session was trainer-led and lacked interaction. ▪ A lecture is not the best way to cover communication skills. ▪ No chance was given to practice skills. ▪ It did not use a wide variety of training methods. ▪ No time was allocated for evaluation. ▪ There was no mention of learning objectives.

4.3.2 Possible Answer	How would you rate **the manager's training program** on a scale of 1 to 10, where 1 is very poor and 10 is excellent? Explain your reasons for this rating. This program is likely to be rated higher than the previous program. Comments about this program may include: ■ It is more detailed. ■ Participants' needs are taken into account, which means there is flexibility. ■ A variety of training methods were used. ■ The training methods were appropriate to the different sections of the training. ■ There were opportunities to practice skills. ■ Relevant topic areas were covered. ■ Practical areas were addressed (e.g., how to complete the documentation). ■ The session ends with an evaluation.

Complete the table below showing the strengths and weaknesses for each of the programs.

	Strengths	Weaknesses
Appraisee's Training Program	An outline was provided. There was an opportunity for participants to ask questions. There weren't too many activities for a two-hour training session.	■ Did not incorporate activities for different learning styles. ■ Not very detailed. ■ Trainer-led with limited interaction. ■ No chance to practice skills. ■ Limited variety of training methods. ■ No evaluation at the end of the event.
Manager's Training Program	■ It was very detailed. ■ It was flexible. ■ A variety of training methods were used. ■ Appropriate range of training methods used. ■ Opportunity to practice skills. ■ Wide range of topic areas covered. ■ Evaluation at the end.	■ There was a lot of material to be covered in a two-hour session. ■ No time was allocated for general communication skills. ■ May not meet the needs of people with more complex learning style preferences.

The **4.3.3 Possible Answer** label appears in the leftmost column alongside the table above.

4.3.4 Possible Answer	Discuss how a new program could be designed to address the weaknesses identified in the previous question. ■ More interaction. ■ Include a greater variety of training methods. ■ Design more flexibility into the program. ■ Ensure participants have a chance to practice their new skills. ■ Incorporate activities for different learning styles. For example, learners with a preference for the theorist learning style would learn from a structured activity such as a lecture. ■ Plan a realistic number of activities for a two-hour session. ■ Focus on important communication skills.

4.4 **Possible** **Answer**	Write an overview of the appraisee's training program. Use the questions below to help structure the outline: ■ Who will deliver the training? ■ How long would the session(s) last? ■ What are the key areas to cover? ■ Can you use any of the same areas from the manager's training program? ■ What are the key differences between a session suitable for managers and one geared toward employees? ■ How would you allocate time for the different activities during the training? ■ If you split the session into two parts, how would you divide the content between the two sessions? It may be appropriate for the training to be delivered by a combination of people, including the HR manager, but with input from other senior management team members. Appraisers could also take part in some elements of the session, although this may intimidate some appraisees from voicing any concerns. The session should be short, probably no more than two hours. This could be arranged as a single two-hour session or two one-hour sessions. This should be sufficient to cover all of the key topics. If other issues are identified during training (e.g., the need for more communication skills), a follow-up session could be arranged. The main areas to be covered would be: ■ Why the organization needs a performance management system. ■ Appraisees' roles. ■ How to prepare for the performance review. ■ How to complete the documentation. ■ How to set objectives. ■ How to identify training needs. Some of the areas would be the same for appraisers, but appraisee training should focus more on the practical details of how to participate, rather than linking it to strategic objectives.
4.5 **Possible** **Answer**	Considering your answer to the previous set of questions, how would you rate the proposed appraisee program? The proposed training program looks quite comprehensive. Students may highlight some of the following strengths: ■ It is a well-structured program. ■ The program begins clearly, with an introduction to the session and an overview of objectives. ■ Participants understand why they are taking part. ■ It does a good job in covering the practical details. ■ There are interactive activities to allow participants to practice (e.g., the role plays). ■ The content is specific to appraisees and is not just a copy of the appraiser program. ■ Small group activities allow the trainer to get to know the participants. ■ There is an evaluation at the end of the session.

4.6 Possible Answer	Design an evaluation form that could be completed by participants at the end of the training program. The evaluation form may include the following questions: ■ How well did the training session meet the stated objectives? ■ How well did the trainer deliver the training? ■ Was the content appropriate for the audience? ■ Do you understand how you can apply this training? ■ Would you recommend the training to others? ■ Did the training provide value for the money? ■ Were the training methods appropriate? ■ Was the duration appropriate? ■ What were the strengths of the training? ■ What were the weaknesses of the training? ■ How could the training be improved? ■ How can this training help you in your job? (This could be divided into short-term and long-term.) ■ What were the key items you learned in this training? ■ Do you need any further support to help transfer this learning to the workplace? ■ Is follow-up training needed?
Extension Activities	
5.1 Possible Answer	Discuss how your proposed training program could be adapted to meet different learning styles. Students should refer to one of the learning style models discussed in the recommended texts and provide examples of how content and material could be differentiated to meet the needs of people with different preferences. The example shown below uses Honey and Mumford's learning styles (an introduction to their learning styles is provided in the accompanying presentation): Participants with a preference for the **activist** learning style: ■ Play business 'games' where participants solve a set of problems. ■ Work in small teams on tasks, where everyone can express an opinion. ■ Include activities which are not too structured or prescriptive. Participants with a preference for the **reflector** learning style: ■ Observe role plays and provide feedback. ■ Analyze scenarios and report on them. ■ Write activities after time for consideration. Participants with a preference for the **theorist** learning style: ■ Use logical, structured activities. ■ Provide references to back up key themes. ■ Use probing activities. Participants with a preference for the **pragmatist** learning style: ■ Provide clear links between the activities and the topic. ■ Participate in role plays with the opportunity to gain feedback. ■ Link activities to practical benefits. ■ Apply a given formula.
5.2 Possible Answer	Describe what you would cover if you were asked to provide a shortened (one-hour workshop) version of the program for three managers. Students should identify the most important topics: ■ The new system's benefits. ■ The new documentation and how to use it. ■ Setting SMART objectives. ■ How to help employees identify their training and development needs.

5.3 Possible Answer	Make a list of top ten tips for preparing a training event and ask for feedback from one of your fellow students. The lists may include some of the following tips: ■ Choose an appropriate location. ■ Choose a date and time that is convenient to the majority of participants. ■ Plan your time carefully so that the key areas are prioritized. ■ Ensure that the trainer is well-organized. ■ Use a variety of training methods. ■ Hire a knowledgeable trainer. ■ Find out if any of the participants have special learning needs which may require additional support (e.g., enlarging handouts for someone with a visual impairment). ■ Be clear about any pre-work the participant should complete before attending the session. ■ Be clear about the goals and objectives of the session. ■ Be flexible; if one activity is not working well, try a different approach. ■ Remember to cover the practical details in the content design. ■ Make the most out of the feedback you receive.

5.4 Possible Answer	Design criteria that could be used to select an external trainer.
	
	■ Personal characteristics:
	  • Ability to speak confidently.
	  • Flexibility when working.
	  • Confidence.
	  • Excellent communication skills.
	  • Motivational.
	■ Experience/reputation as a trainer.
	■ Previous relationship with the organization.
	■ Knowledgeable about the latest developments in the field.
	■ Experience in providing training to similar organizations.
	■ Technologically competent (able to operate the audiovisual equipment).
	■ Can tailor resources to the organization.
	■ High-quality training materials.
	■ Good references.

5.5 Possible Answer	Provide a report to the director of administration for the business case to provide more training in people management issues for non-HR specialists. Points that may be included in the report are: ■ Enabling managers to address some of the simpler HR issues will free HR specialists to concentrate on more strategic issues. ■ Managers will feel empowered to manage their own team. ■ The training will develop manager skills, which may be a useful retention tool. ■ Managers are in the best position to determine the needs of their own staff. ■ Cost-effective. ■ May enhance the organization's reputation as being a committed employer. ■ Highly skilled employees are likely to have higher levels of job satisfaction. ■ May enhance manager loyalty to the organization.
5.6 Possible Answer	As part of the training evaluation process, outline what evidence could be gathered to measure the effect on work performance. Students should note that it depends on the job; some jobs have more measurable outputs than others. Points that may be included are: ■ Trainees could be asked to perform self-assessments before and after training. ■ Trainees' managers could be asked to perform an assessment. ■ Administer a test to assess trainee learning. ■ Tangible statistics on output could be obtained

Sample Training Program Schedules

Program 1—Manager/Appraiser Training Program

Suggested Timing for Each Session Segment

Total Time: 2 hours

- Introduction to session: 15 minutes
- Lecture on general communication skills: 15 minutes
- Refreshment break: 10 minutes
- Lecture on how to complete performance management documentation: 25 minutes
- Video on performance management: 30 minutes
- Questions and answers: 10 minutes
- Computer-based test: 15 minutes

Program 2—Appraisee Training Program

Suggested Timing for Each Session Segment

Total Time: 2 hours

- Introduction to the training (includes goals and objectives): 10 minutes
- Discussion with participants about what they want to get out of the session: 5 minutes
- Lecture on why performance management is important: 10 minutes
- Case study on dealing with difficult situations (whole group discussion): 20 minutes
- Role-play on dealing with difficult situations (pairs with a third person providing feedback): 20 minutes
- Interactive presentation on SMART objectives and training needs analysis: 10 minutes
- Small group case study on setting SMART objectives and identifying training needs: 15 minutes
- Whole group discussion on how to complete performance management documentation: 15 minutes
- Introduction to additional resources, including handouts and website addresses: 10 minutes
- Session evaluation: 5 minutes

TRAINING EVALUATION FORM

Your name: **Name of training session:** **Name of trainer:**	

Why did you attend this training session?

<div style="background-color:#a5c520; padding:4px;">

Please rate the following aspects of the training:

</div>

	Very Good	Good	Satisfactory	Poor	Very Poor
Quality of materials					
Knowledge of trainer					
Presentation skills of trainer					
Location of training event					
Duration of event					

	Strongly Agree	Agree	Not sure	Disagree	Strongly Disagree
The session met the stated objectives.					
The activities in the training session worked well.					
The training methods were appropriate.					
This training helped me develop my knowledge in this area.					
This training helped me develop my skills in this area.					
I now feel confident conducting performance reviews with members of my team.					

Rating:
On a scale of 1 to 10 with 1 being the lowest and 10 being the highest, rate your level of knowledge before the program.

1   2   3   4   5   6   7   8   9   10

On a scale of 1 to 10 with 1 being the lowest and 10 being the highest, rate your level of knowledge after the program.

1   2   3   4   5   6   7   8   9   10

Additional comments or suggestions:

Thank you for taking the time to complete this evaluation.

APPRAISEE TRAINING PROGRAM AGENDA: PERFORMANCE MANAGEMENT

- **Session introduction (led by trainer)**

  - Session overview
  - Goals and objectives
  - Question-and-answer period for initial questions from participants

- **Introduction to performance management (interactive presentation led by trainer)**

  - What does performance management mean?
  - Why does the school have a performance management system?
  - What are the benefits of performance management?

- **Review of the new system (lecture by trainer)**
- Practical considerations

  - Who will conduct staff appraisals?
  - How long will the appraisals take?
  - Where will the appraisals take place?
  - How far in advance will appraisees know the date for their performance review (one week, more)?
  - What documents/evidence will you need to show your appraiser?
- Review the new documents and explain how they were designed.
- Explain how to complete the new documents.

- **Role-play activity**

The group will be split into teams of three and will receive a completed performance review preparation sheet. One person will play the appraise, one person will be the appraiser, and a third person will observe and provide feedback.

- **Communication skills**

After a brief interactive presentation, the trainer will work with the groups through role-play scenarios.

- **How to make the most out of your performance management review**

  - Five tips for a successful performance review.
  - Dealing with difficult issues.
  - Following up after your meeting.

- **Question-and-answer session followed by the distribution of the performance management documents**

- **Session evaluation**