Section Four:

Delivering Learning, Training and Development

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Open, Distance and Flexible Learning

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INTRODUCTION AND LEARNING OBJECTIVES

In this chapter we will consider the opportunities for formalized learning which have opened up in modern times through a wide variety of approaches aimed at minimizing the time teachers and trainers need to spend in direct classroom contact with learners (Rowntree, 1992).

Attempts to sum up all the approaches in one term have not really succeeded, and a widely used compromise is to refer to open, distance and flexible learning (ODFL). A major task of this chapter is to closely consider the terms open learning, distance learning and flexible learning, which are sometimes used in very specific ways and sometimes in very generalized, even vague ways, giving rise to confusion.

The chapter will clarify the strengths and limitations of conventional classroom-based teaching and learning, and demonstrate how newer approaches to formalized learning can complement these strengths and overcome some of the weaknesses.

The chapter moves on to consider the general issues which arise in developing systems not dependent on classroom interaction between teachers and learners as the main method of achieving effective learning. Managing ODFL systems is demanding, and a further key aim is to outline issues to be faced by managers of such systems.

The wide range of ODFL approaches now available through newer information technologies will be reviewed briefly, but are taken up in much greater depth in the following two chapters. Here we will simply consider their main strengths and limitations in the context of effectively supporting learning in the affective, cognitive and skills domains.

Having read this chapter you will:

- understand the nature of open, distance and flexible learning;
- know the advantages and disadvantages of open and distance learning;
- understand the locus of control in the learning process between the tutor and student; and
- be familiar with the requirements of a corporate learning centre.

FROM TEACHING TO LEARNING

The development of ODFL is not just a story of technological interventions in teaching and learning, but also a story of changing relationships between teachers and learners. One of the most striking aspects of ODFL is its widespread utilization in adult education and training, but limited spread into the compulsory schooling system thus far. A fundamental aspect of formalized education and training is that historically it has been set in the context of a power relationship between teachers and learners. This reality is expressed as much by the use of the term 'discipline' to mean subject area of study (eg, physics, history, or French), as by the cane that was once wielded by most secondary school teachers in Britain.

The conventional approaches to formal teaching and learning have been set in a context with many important associated values, whether overt or covert. Through their lives adults learn a great deal by informal methods. However, this learning, mainly gained from life experience, but also from general reading, watching television, etc is not regarded as carrying much status (except perhaps in pub quizzes or when helping somebody to change a wheel on their car).

Learning which takes place in a classroom and institutional setting, and under the control of a teacher has come to be regarded as the highest status, most important and most worthwhile type of learning.

There are many reasons for this. The teachers are clearly more expert than the learners in the area of learning in question, and this confers status. The whole process is highly visible, and we can accrue evidence of successful learning taking place by teacher-designed assessment procedures. Indeed, valued qualifications are awarded to successful learners following extended periods of learning and assessment. Formalized teaching taken forward in institutions by recognized teachers leads to both employment opportunities and the growth of professions (teacher, educational administrator, school secretary, and so on). All those employed by the formal education and training organizations have had a strong vested interest in promoting face-to-face teaching as the most important way to achieve learning.

However, because of the sheer variety of ways in which learning can occur, it has never been possible for the formalized teaching bodies to monopolize learning, and certainly not adult learning.

In Western society, the Christian Church controlled most of the formalized learning opportunities until the 15th century, when the introduction of the printing press opened the door to the possibility of encouraging learning outside the control of the Church. Indeed, the book has for hundreds of years been the forerunner of all that we now consider important in terms of learner control of learning.

As we go on to consider ODFL systems, we could do well to keep the book in mind as an example of a learning system covering all of these approaches. The benefits that we see in books in aiding learning alongside or instead of classroom lessons are much the same benefits which we can recognize in ODFL systems. The limitations of books in aiding learning can also exist in these more purposeful learning support systems, but much effort has gone into reducing the disadvantages and increasing the benefits.

Many limitations exist in a learning system based wholly on classroom teaching. Often we think of the poor quality of teaching offered, and we have all had bad experiences of this that we can readily quote. Even more fundamental than this as a disadvantage, however, is the requirement that the learner has to be in the classroom in time for the lesson, and must stay in the room and concentrate wholly on the lesson for its full duration.

We will all have had experiences of wishing ourselves to be almost anywhere than in the class, and this is hardly a good basis for learning. One of the fundamental advantages of ODFL systems is the opportunity for the learner to control the place and time of learning. These are vital concerns of adult learners, who are constrained in both respects by their personal circumstances (paid employment, caring responsibilities, etc).

The whole rationale for distance learning courses is to enable those who live and work at considerable distance from the learning providers to nevertheless take forward their studies without having to travel, with the cost and time implications. It is no surprise that correspondence courses established themselves soon after national and international postal systems were established, to meet the needs of learners spread out across North America and the British Empire for example.

Of course there are still many people who are constrained from any travelling to classes because of physical infirmity or disadvantage, because they are in prison, or because they work abroad (or at sea). Again, it is no surprise that ODFL approaches were introduced at an early stage for adults constrained from travelling to institutions for their studies.

Time constraints are often equally as difficult for adults to grapple with, in terms of regular classroom attendance. My own life is not only hectic, but has no regular pattern in terms of working hours and places, so that regular weekly class attendance is out of the question, and finding two or three consecutive days to attend an intensive course almost as difficult.

For many potential adult learners disadvantage is placed on disadvantage such that it is simply impossible for them to ever undertake formal study by attendance at conventional courses. This is one reason why so many adults go for years without undertaking any formal study. Even for those in employment, opportunities to undertake classroom-based study organized by their employer are limited by schedules and the number of course places available at any one time. Many workers are specialists in their field and therefore have to look outside their organization for training, or work for small firms that cannot organize training for them. One of the most important areas of growth within ODFL in recent years has been the provision of opportunities to learn in this way by larger employers. This is a topic taken up later in this chapter.

Let us move on to consider some definitions concerning ODFL, starting with distance learning.

DISTANCE LEARNING

Distance learning systems in their 'purest' form require no face-to-face interaction between the learner and those organizing and offering the learning. In principle, this means that not only does the learner have no face-to-face involvement with any teachers, but also that the learner can be registered to undertake the learning, begin and take forward the learning, complete the learning, be assessed on this learning, and, if appropriate, awarded a qualification, without ever being in the same building as anyone associated with the organization offering the learning. This has been, and is still in some cases, the situation with distance learning undertaken with correspondence colleges, or via the purchase of language learning packages for that matter.

Generally such distance learning systems involve registration for the course, or receipt of the learning package by post, followed by receipt of learning materials by post and submission of course work for assessment also by post. Communication also takes place by telephone in most cases, while the advent of fax and e-mail is opening up the possibility of transferring significant volumes of text by electronic means. The newer technologies offer communication at a distance from tutor to learner and learner to learner by a whole variety of approaches, from e-mail to video conferencing. These possibilities will be considered in the next chapters.

Any system of learning that aims to operate without any face-to-face contact with those organizing the system will probably have to be well thought out and structured if it is to succeed. Many matters related to the organization of the learning system, which may be little considered, or ignored, in a face-to-face learning system, will need to be explained clearly in writing in a purely distance learning system, where the learners do not have an opportunity to ask questions easily and quickly of the learning programme designers and deliverers.

Similarly, the learning material will have to be well-designed and presented in a situation where learners are not in dialogue with teachers. It is also very important to note that the material will be open to general public scrutiny, while classroom processes are still a much more 'private' affair.

There are many advantages for the learner arising from a text-based distance learning system. At once all time constraints are relaxed, since the learning can in principle take place at any time, day or night, seven days a week. For sighted adult learners at least, text-based materials are familiar learning tools since all those who can read will have learnt at some stage from books, course handouts, manuals, etc. Text-based materials are generally produced in sections, with each section being convenient to lift and carry about. In this way study can be undertaken almost anywhere which is lit, including doctors' waiting rooms, public transport, or the works canteen.

Distance learning systems may still impose time and place constraints on learners. For example some distance learning courses require a certain amount of material to be delivered each week or each month, and may be 'paced' by delivering a package of materials weekly or monthly, with course work based on the study of the materials to be delivered at set intervals. On the other hand, the use of a package of distance learning materials, where the learning is not assessed in any way, may not involve any pacing of this type.

Many more modern distance learning systems go beyond the use of text-based materials, and may reintroduce time constraints. For example introducing radio or television broadcasts in support of text-based material, as the UK Open University did at its opening in 1970, required learners to set aside time to receive such broadcasts, unless recording equipment is set up to allow 'time shifting'. Equipment will be needed to receive the broadcasts, and even more to record them.

TELEVISION AND TRAINING – BIG CHANGES FOR SMALL FIRMS

The introduction of digital broadcasting opens new possibilities for education and training on television. With the expansion of broadcasting airtime specialist channels become feasible, while the convergence of broadcasting and information technologies presents new and innovative opportunities for delivering training to companies and to individuals. At present training-related programmes have a very limited presence on TV. Sir John Harvey-Jones' 'Troubleshooter' series for the BBC showed how the expertise of an experienced manager could be disseminated to a general audience in an informative and entertaining way. Yet this example is very much television programmes as product, crafted to meet the interests of a general audience rather than to realize specific in-company training objectives.

Another approach is to integrate the production of television programmes into a training process which relates to issues such as managing change. A recent project initiated by the media production company AV Edge Ltd and funded in part through the EU programme Adapt, presents an interesting example of how the process of making programmes for television can be incorporated into a larger change management intervention. This project will result in a multimedia training package for use by SMEs. It includes six TV programmes, which document the experiences of a core group of SMEs (small and medium sized enterprises) as they review their experiences and devise and implement strategies for change management. The participating companies are largely owner-managed or family-owned companies operating mainly in the service industry. All are successful at their present level but are aware that the uncertain nature of the environment means that they need to innovate if they are to continue this success in a rapidly changing marketplace.

The AV Edge team has devised a strategy that involves the key managers in these companies in an experiential training programme. The more formal elements of this process involve meetings and discussions among the various managers at which they exchange their views and experiences. These activities are documented on video and the material will be used in the TV programmes. The managers are also interviewed on site to elaborate on the issues facing the companies and to provide a visual context for the discussions.

While these production strategies are similar to those used in conventional television production, AV Edge has also included a more innovative approach which involves the use of digital video cameras by the managers. These cameras are provided on request and are used by the managers to capture significant points in the development of the company as it meets new challenges and faces significant decisions. The managers use the video cameras as a means of capturing the reality that they are experiencing.

Later, by examining, reflecting and discussing the video presentation of their perceptions of this reality, they gain greater control over the situation and the issues that emerge. Even though the initial intention in the use of video cameras was to record material for a television programme it has become clear that video, as a medium, has a powerful potential as a means of examining the dynamics and processes within a company. By involving the managers and staff of a company in the production of video reports it is possible to generate a process of preparing and planning for change. With the advent of digital broadcasting and the introduction of specialist channels for education and training, video material generated in this way can be brought to a wide public.

With acknowledgement to John MacMahon, Editor of Educational Programmes, Television, at Radio Telefís Éireann, Dublin.

Newer technologies may introduce further constraints on time and place, for example video conferencing, while others such as computer conferencing may allow complex interactions between learners (and tutors) over considerable time periods on a very flexible basis. If these are the advantages of 'pure' distance learning, what are its limitations? To answer this question, perhaps we should come back to the issue of classroom-based learning. Despite my earlier strictures, this approach has been used by all kinds of societies over all of recorded history, so the approach must have something in its favour. Leaving aside for a moment the issue of cost-effectiveness in learning delivery, we must recognize that for learning to go forward there must be motivation to learn. Here the classroom-based approach to teaching and learning has much to offer.

The teacher can increase motivation in many ways through direct interaction with the learner. Teachers can be a source of inspiration, encouragement, friendly advice, positive criticism, and comradeship. For many learners fear of 'letting down' the teacher can be of itself a major source of motivation to learn, especially in difficult fields. While teachers and trainers can do their best to offer such support at a distance, by phone or text-based messages, it is much more difficult to do so than in a face-to-face situation (Evans, 1994).

While some of us may like to settle down with a good book from time to time, we are social animals and prefer to spend much of our time with others. This is especially so when faced with challenges we find stressful and worrying, which can often be the case for adult learners. The stress is less and the fun of learning greater, in general, when we meet and learn with others.

At its worst the distance learning system can isolate learners, create seemingly impenetrable barriers to learning part way through learning programmes, with no immediate help in sight, and become an inhuman, inflexible, bureaucratic and dreary form of learning provision. This has doubtless been a major reason for the high dropout rate from earlier correspondence courses, 70–80 per cent being regarded as tolerable in some cases.

For this reason, even where a range of methods of contracting learners at a distance is available, very few purely distance learning courses have been introduced in modern times. For example, even the UK Open University, which is seen as an outstandingly successful distance learning university, in fact includes significant elements of face-to-face contact with tutors and fellow learners in most of the courses. Despite the excellence of the learning materials developed by the Open University, many educationalists believe that its successful retention of students and higher pass rates relative to earlier correspondence courses lies with its very sensible retention of many of the benefits of face-to-face tuition, including the allocation of specific local tutors to particular groups of students over extended periods of learning (Bell, 1993).

The decision to include face-to-face learning sessions within a distance learning course, especially where these are obligatory, should not be taken lightly. We have already discussed the problems that arise for many adult learners when they are required to travel for classes. In many mixed-mode learning programmes, which strongly feature distance learning but include some face-to-face components, the bulk of the learning is delivered in distance learning form. The face-to-face sessions are used to motivate learners, and focus on learning which is difficult to achieve at a distance (for example the development of teamwork, or some practical skills). This is a matter to which we will return in the context of flexible learning developments. Birchall (1990) introduces the idea of third generation distance learning, where video conferencing, e-mail, and voice mail reduce the need for face-to-face contact still further.

OPEN LEARNING

Open learning is by no means as easy to define as distance learning. Indeed, there are very many definitions of open learning, and it is often used as an umbrella term for any learning system that is not significantly based on face-to-face tuition.

Part of the confusion arises from the use of the word 'open' to mean entry onto a study programme without prior academic qualifications. The dominance of the Open University in the UK has not been helpful, since it does have open entry in this sense, but delivers its courses by distance learning methods.

Alternatively, 'open' can be used to imply a learning approach which is open to negotiation, which is not always tutor-led, and which offers possibilities for changes to course objectives, content and methods of learning and assessment, if relevant. The public library stands as one of the ultimate examples of an open learning institution in this sense, and many a working woman or man has gained her or his 'education' by public library membership. As the entry cost into the world of the Internet reduces, the scope for access to information by this route is increasing.

Although access to information of itself does not provide an education, or even support learning in any depth, any system which empowers the learner is moving in the direction of an open learning system in my view. This takes us back to my own earlier comments about power relationships in learning, which are further explored by Edwards (1991).

From a power viewpoint, any learning system can be seen as sitting somewhere along a continuum, with the conventional institutional system at one end and completely independent learning at the other, as illustrated in Figure 14.1.

At the left-hand end of the spectrum the institutional teachers and managers control virtually everything:

- what courses to offer;
- who can come on them;
- what the courses will cover;
- how they will be structured and taught;

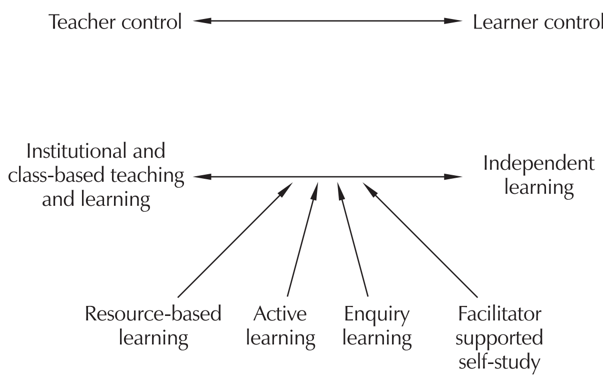

Figure 14.1 The teaching–learning system continuum

- how they will be assessed;
- how decisions will be made on successful course completion.

Learners can only influence the situation by not taking the course, dropping out, or criticizing the course (normally after completion of studies). In general adults seek at least some control of the system under which they are expected to learn. Enlightened adult educators and trainers make every effort to empower learners within the constraints under which they have to work.

Learning programmes leading to qualifications are subject to many institutional or awarding body constraints, but even here increased flexibility around the delivery of learning programmes is possible. Many qualification courses can be taken with little classroom attendance, and are often referred to as 'open learning courses'.

Where does distance learning fit into this continuum? Many distance learning courses do offer 'open' features, as the learner controls the time and place of study. However, many distance learning courses are very much controlled by the delivering institutions, the UK Open University being a case in point, and in this case fall towards the left-hand end of the continuum. This is not necessarily a criticism, since all institutions in effect set up contracts with their adult learners and attempt to act in their best interests. A completely 'open' system may sound ideal, but the fully independent learner is open to failure to learn, indeed often to not even engage in learning at all (Fox 1991).

I believe that it is very important for educators to keep the issues of power and control to the front of their minds when developing learning programmes. Too much tutor control and learners can become antagonistic and drop out of learning programmes; too little and they can become apathetic!

Learners vary greatly in their capability to learn autonomously, which adds to the challenge of determining where to place a learning programme along the continuum. Older adults whose formative learning experiences were gained in traditional schools may not consider themselves able to cope with significant levels of self-direction in learning. Indeed they often regard themselves as short-changed when tutors refuse to teach, or offer only limited availability even to discuss their course work.

Many teachers and trainers are also threatened by being required to operate towards the right-hand end of the spectrum, where they are not able to fully demonstrate their undoubted classroom teaching skills or subject expertise. The loss of power to control the teaching and learning process may also be keenly felt, especially where the trainer is being held responsible for the achievement of specific learning by the learners.

Harper (1993) summarizes the case for open learning from the learner's perspective as follows; open learning:

- dispels the learner's common notion that classroom attendance is equivalent to effort and achievement;
- recognizes that different students learn at different speeds and in different ways;
- helps learners to learn how to learn;
- helps learners to accept responsibility for their own learning;
- encourages learners to be more active in their learning; and
- generates motivation and commitment and stimulates a sense of self-management.

While all this can be the case, poorly prepared open learning materials, poorly supported by uncommitted trainers, can lead to loss of confidence in learners and failure to learn. It is vital therefore to take forward the best interests of learners and trainers.

OFFSHORE OPEN LEARNING

A North Sea oil company needed to conduct training on safety for visitors to exploration and production platforms in the North Sea. There was particular concern that contractors should be aware of the hazards, the control measures in place, and the expected safe working practices.

There was also a need to train company staff on technical issues related to risk control. Each platform had a safety officer who could undertake some training. There was concern to standardize the training to meet both needs, and to ensure that day-to-day work did not stand in the way of everyone receiving training.

The answer was seen to lie with an open learning approach, especially given that workers could undertake open learning work in the time they had free from operational duties. The need was for self-paced learning, which would be highly interactive and draw in the learners to increase their motivation. The safety training field benefits from visual inputs, and requires checks that learning is taking place fully and effectively.

An interactive video approach was therefore considered most appropriate in both cases. Video material was shot on the oilrigs in line with the storyboards generated by experts in relevant aspects of risk management. Commentaries were added to give full video material. This was then edited to generate a high level of multiple-choice interactivity.

Feedback and evaluation records were built into each programme. The two programmes have been used extensively and have proved very effective in terms of learner acceptance and learner effectiveness.

FLEXIBLE LEARNING

The ambiguity about the meaning of open learning, and the move towards very flexible methods of accessing information and contacting members of the learning community have encouraged the wider use of the term 'flexible learning'. While flexible learning may be used in connection with both open and distance learning, it could well incorporate face-to-face tuition, tutor-less learning groups, indeed any appropriate continuation of learning methods where the learner's real needs and possibilities are to the fore.

The concept of flexible learning has been defined by the Further Education Unit of the UK Department for Education and Employment as:

> the adaptation of available learning opportunities to meet the needs of the learner in a way which optimises the autonomy of the learner as well as the effectiveness of the process of learning. (FEU, 1983:11)

As with open learning, the term 'flexible learning' is used by different people in different ways in different countries. Malone (1997:5) states that:

> This is not merely the result of different languages and cultures, but rather the outcome of different educational, training and vocational training systems and alternative applications of new technology.

As with open learning there are degrees of flexibility available to suit particular learning needs, but also the culture and customs of particular organizations providing learning opportunities (Waterhouse, 1990). A university will not expect its students to learn mainly in classrooms, and much encouragement is given to learning in the library, by study at home or in the hall of residence, from other students, and from practical experience. In contrast a secondary school will hold its students in classrooms for most of each school day, with school teachers controlling much of the learning process. Similarly, work organizations will vary greatly in the extent to which they allow or encourage flexibility in learning provision. Clearly young craft apprentices cannot be left to find out for themselves how to operate powerful and fast-moving machinery in the apprentice training school, or on the shop floor; nor can newly recruited soldiers be left to teach themselves from a manual how to fire a rifle.

In contrast many experienced workers are operating at the frontiers of knowledge and skill in their specialist fields. Within their work organizations such workers may not be able to turn to the training department to advise them on how to take their learning forward, let alone organize this for them (Johnston, 1993).

The mind shift from regarding learning as an activity largely directed by teachers and trainers within a classroom environment, to seeing it as an activity primarily of concern to learners, where they will be offered as much flexibility as possible to determine their best ways to learn, is difficult (Bailey, 1992). Once it has been made, there are many exciting options that open up. These retain an important place for face-to-face learning directed by teachers and trainers, and for learning in groups, but do not see these as an automatic requirement, nor as necessarily a major part of a learning programme.

Decisions about how to take learning forward rest substantially with the learners, and in this case some flexibly delivered programme will generally result. Unless geography makes it impossible, learners will generally favour undertaking demanding and longer study programmes that include some face-to-face teaching and some group learning. However, the onward march of learning technologies continues to open up ways to learn autonomously which were just not possible in the past.

ISSUES FOR THE LEARNER IN ODFL

Much of the current literature on ODFL considers the changed situation from the viewpoint of the providers of learning programmes and/or the companies for which the learners are working. This is because the developers of new technology-based learning programmes are selling to training providers in the first instance, and because companies see ODFL as a lever to achieve organizational change. However, it is the learner who has to achieve the learning, and many ODFL schemes have failed because the real needs and circumstances of the learners were not properly considered.

Learners will vary greatly in terms of their initial motivation to learn autonomously, or to plan their learning autonomously. They will also vary greatly in their ability to learn autonomously, either at all or by particular learning methods. Learning providers with experience in dealing with very heterogeneous groups of learners and a commitment to ODFL will tend to offer a range of face-to-face learning opportunities, but not insist that these are all taken up. They will also provide plentiful opportunities for potential learners to discuss their learning hopes and ideas with experienced learning guidance professionals. The UK Open University is a good example of this approach. From the outset some learners will not attend many classes and will not seek much contact with their tutors otherwise. In contrast some learners will seek a great deal of advice on learning options, attend every class which is organized, and contact their tutors frequently.

Many learners will seek more or less general guidance and specific learning support from professionals, depending on how well their studies are going and how relevant they seem to future personal scenarios. In general, as time goes by and learners become more confident in their ability to learn by ODFL, so they will see less and less need for class contact and tutor support. The Open University takes account of this trend by offering many more classroom sessions for its foundation courses than for its more advanced courses which follow on from these.

It may well be argued that a major purpose of adult education is to develop learners' self-confidence in 'owning' their own learning, and the ability to take learning forward on a self-help basis. Malone (1997:14) argues that:

> Open learning is an ideal means of developing the necessary skills and attitudes of self-reliance and initiative precisely because they are exactly those that are acquired when doing open learning.

Differences in learning styles are also an important consideration in regard to learner options in the ODFL context. Text-based open and distance learning materials with limited scope for interaction with the text via problem-solving exercises, or exercises that encourage creativity, are likely to be more suitable for those who learn best by starting from reflection and theory, rather than those who learn best from an action-oriented start. This relates to Honey and Mumford's (1992) learning styles (see Chapter 10).

However, today an enormous range of open learning materials is available to suit a wide variety of learning styles as well as learning topics and levels. Computer-based training (CBT) programmes, which encourage experimentation and a trial-and-error approach to learning are available. Indeed the most sophisticated CBT packages will allow learners a variety of options in the way in which they learn from the package, according to their own preferred style. Research is in progress to develop CBT systems that will not only diagnose from learner interaction what each learner does or does not know, but also how the learner prefers to learn, and adjust the delivery of learning accordingly.

ODFL has been taken up substantially in the corporate world in recent years, for a whole variety of reasons which we will consider in the next section. Many errors have been made in this process, for many reasons. Fundamentally, however, these reasons come down to not taking sufficient account of the needs and circumstances of the learners. There is little point in setting up an open learning centre in the workplace if the packages available are of no relevance to the workforce, or if the level of learning involved is too high or too low. Nor will workers be able to benefit from the open learning centre if their work and general life demands never give them time to get access to it to do some studying. In some companies supervisors have been reluctant to allow workers to attend open learning centres during working hours. While there may be good reasons for this reluctance, there has to be accord across a work organization about how an open learning centre is supposed to work for it to be successful. If learners perceive discord at management level they will be very reluctant to involve themselves in ODFL at work, however much money is spent on centres, learning equipment and packages.

Worker motivation to learn needs to be very carefully considered if open learning centres are to be cost-effective, otherwise they may remain empty rooms, or worse, rooms full of workers gossiping for long periods during working hours. Stephenson (1992) found that the presence of a tutor improves performance. At the very least workers will want their learning achievements to be recognized, and known about by their superiors and peers. It is all too easy for this to be overlooked when ODFL methods are employed. The increasing trend towards assessment and accreditation of learning is a very real benefit here, since much ODFL has explicit learning objectives which are readily accessible. It is unsurprising that ODFL programmes leading to well-regarded qualifications are especially popular with workers, and learners generally (Thorpe, 1993).

ISSUES FOR ODFL PROVIDERS

Broadly considered there are three types of ODFL providers: those that sell services directly to learners; those that incorporate ODFL approaches into learning programmes offered in the public sector institutions; and those that offer ODFL opportunities within the context of work organizations. Consideration of the issues affecting those operating businesses based on offering ODFL, directly to learners or to organizations where learners are based, is beyond the scope of this chapter. The development and production of ODFL programmes and materials for open sale in this way is now a huge and expanding industry. The content and forms of ODFL involved depend primarily on marketing considerations. There are mass markets for packages on subjects as varied as foreign languages, great paintings or learning the guitar. Many employers base their ODFL provision largely or entirely on such 'off-the shelf' materials and equipment, with an increasing trend towards multimedia packages. Universities and colleges have tended to develop their own ODFL packages which are most commonly incorporated within more conventional courses, or offered on a stand-alone basis for qualifications.

It is the issues faced by organizations which have already been providers of conventional learning programmes in switching some of their provision to ODFL that I wish to focus upon now. The first question should always be, why change towards ODFL anyway? This change will cause upheavals of various kinds, and the benefits need to be clearly identified if the costs involved are to be justified:

- Are there potential learners that we can reach more readily by ODFL methods whom we would like to support?
- Do we have existing learners who could learn more readily through access to ODFL methods?
- Are there training needs that we cannot currently meet properly or at all by conventional methods?
- To what extent do we know that the ODFL approach will lead to more and better learning on a cost-effective basis, and that this learning will benefit the medium-term profitability of the organization?

While it may not be possible to fully answer these questions before going forward, by asking them across the organization a whole range of issues can be clarified. Once there is clarity on why a change toward ODFL is justified then it is easier to persuade teachers, trainers, line managers and learners alike that the effort to change their practices will pay off. All too often particular ODFL methods have been hurriedly introduced in organizations as varied as universities and international companies with no real justification beyond their trendiness in the eyes of one or two senior managers or trainers. The concerns of lower-level staff have been overridden and very substantial expenditure has been incurred, with no lasting benefit to the organization. Meanwhile the learners involved have been damaged, and the overall standing of ODFL diminished.

While there can be no recipe for success, long experience would suggest that for most organizations it is better to start small, and to grow ODFL systems gradually, learning by experience, rather than go for a blockbuster approach. While the introduction of top-down comprehensive change can look exciting, and theoretically efficient in time and money, in fact this approach has failed sufficiently, even in progressive organizations, for us to question its wisdom.

Where a training department exists in a company it is very undesirable to initiate an ODFL centre or ODFL course without involving the trainers located there. Even though these trainers may be informed that their existing work is valued, and that they will be just as busy as with face-to-face courses, the open learning centre or course will immediately be seen as a threat. While not all trainers will be willing to change role and learn new skills, there will usually be one or more who will consider doing so. These trainers should be identified and empowered to move into the ODFL field, undertaking whatever training is needed for their new roles. As far as possible these staff should be retained inside the training department and encouraged to take forward some of their pre-existing conventional training work. In this way ODFL is demystified, and no barriers are built up between dedicated ODFL staff and the other trainers.

Once the work grows to involve several ODFL programmes there will be a need to designate a manager for this work. At this stage, it may be worth considering an external appointment to bring in higher-level and novel expertise. However, any such appointment needs to be made carefully so that the ODFL manager is able to fit into the culture of the training function and the culture of the company overall. Otherwise there is a danger of the ODFL function becoming sidelined, and eventually being seen as a costly and unnecessary adjunct to the HRD function rather than a key driver of it.

Alternatively, a sympathetic and experienced company trainer could move into the ODFL management function. Nobody should be appointed who does not have experience of ODFL work, however. In this case new appointments could be considered to work under this manager, perhaps trainers with expertise in ODFL technologies that the company has identified as valuable.

The choice of which learning programmes to offer in ODFL format must be based on careful consideration of learner needs and company functional needs, not on the glamour of the new technologies involved. Ideally, the early choices should be of programmes which are clearly relevant to the learners and the company, are of high quality, and proven success in other places. Seeing is believing, and nothing succeeds like success.

So often the first ODFL programmes introduced into companies (or offered by colleges to their students) are based on normal and unproven technological platforms, delivering study programmes which have only just been developed, in new fields, and offered to learners with no previous ODFL experience, by untrained trainers and teachers who also have no previous experience. It is no wonder that failure results, especially where the learners see no particular reason for the use of an ODFL approach in the first place.

Learners need to learn how to benefit from ODFL in general, and from particular approaches for each learning need. Considerable attention needs to be given to how this is achieved, since the first experience of learning, or trying to learn, by ODFL is strongly formative in regard to attitudes towards the concepts involved. There is much sense in conducting face-to-face sessions initially to introduce the approach, and to take learners through issues around self-directed learning.

If following this stage well-proven delivery systems are used to support quality learning programmes on topics of real interest to learners, which are relevant to their needs, then success is most likely. The potential advantages and disadvantages of open and distance learning from the learner's viewpoint are summarized in Table 14.1.

THE CORPORATE OPEN LEARNING CENTRE

Corporate learning centres have grown rapidly in the past decade. Marx (1995) reports that 8 per cent of the 'Fortune 500' companies in the USA are using interactive media learning

Table 14.1 Potential advantages and disadvantages of open and distance learning from the learner's viewpoint

Potential Advantages	**Potential Disadvantages**
Access to learning materials and programmes may be easier.	There may be less guidance on the level, relevance and appropriateness of learning materials and programmes.
Learning may be achieved on a flexible basis in terms of time.	Lack of timetabled classes may lead to learning being neglected.
Learning can be carried out at a pace to suit the learner.	Lack of a clear timetable may lead to learning taking place too slowly, and ultimately petering out.
Learning may be achieved on a flexible basis in terms of place.	No suitable place for learning may be identifiable.
Learning can be carried out in one's own time.	No designated time is allowed (eg by employers for work-related learning).
Learning programmes may be tailored to individual's needs.	Employer's needs may be inadequately covered without this being recognized by learners.
Cognitive learning at one's own pace may be very effective.	Learning in the affective and skills domains may be difficult to achieve.
ODL encourages autonomy in learning.	Lack of tutor support may lead to loss of motivation and failure to overcome learning blocks.
The absence of 'lessons' can make ODL less 'intimidatory'.	Lack of 'lessons' may lead to lack of discipline in study.
There is less chance of interpersonal conflict with tutors.	Informal mentoring relationships are unlikely to develop.
Lack of face-to-face involvement with tutors and learners may be helpful to introverts.	Lack of opportunity for comradeship, and peer learning may be demotivating.
Learning programmes and materials may be better structured and of high quality in terms of content and presentation.	Programmes and materials may be expensive, not tailored, out-of-date or even of poor quality. They may be over-dependent on one form of presentation.
Learning via new technologies can be exciting and motivating.	New technologies may involve high equipment or software costs, and can be daunting to learners.
Virtual reality systems can helpfully stimulate environments for learning which are difficult to achieve otherwise.	Such systems may be used as cheaper and poorer substitutes for experiential learning in real environments.
Assessment methods may be better thought out and more clearly explained.	Learners may still have difficulty determining what is required in assessments and less opportunity to negotiate these.

programmes. Kay (1995) reports that Target Stores uses computer-based training to ensure consistency in corporate training across its 600 stores. The UK is said to be the leader in computer-based training (Littlefield, 1994). The Rover Group (part of BMW) has spent £2 million setting up its own learning enterprise, Rover Learning Business, to support specialized learning inside and outside the car industry.

Other UK companies which have set up corporate open learning centres include Lucas, British Steel, British Telecom and Norwich Union (Malone, 1997). This task is not necessarily without its challenges, as my own learners have reported in dissertations based on studies in organizations as varied as ones in the aerospace industry and the Singapore Armed Forces. Reasons for slow progress or outright failure include lack of senior management support, lack of consultation with learners, or a fixation on inappropriate technologies. The greatest success is usually achieved when the real needs of the learners, in line with company objectives, are fully considered.

COMPUTER-BASED TRAINING IN ACCOUNTANCY

In October 1998 accountancy staff of the National Audit Office began studying Business Planning Techniques, a non-core subject in the syllabus of the Institute of Chartered Accountants of England and Wales (ICAEW), via computer-based training (Rogers, 1998). In doing so they made history as the first students to study the ICAEW syllabus by an open learning method, outside a classroom structure.

The course was created by EQL International following a policy decision by the ICAEW that its non-core subjects could be studied via open learning materials produced by other organizations, subject to ICAEW accreditation. EQL International plans to produce CD-ROMs covering the other four non-core subjects: professional practice, business and company law, economics, and management and marketing. The company has approximately 4500 students taking one or more non-core subjects via these CD-ROMs in the 1998–99 academic year.

The accountancy firm Mazors Neville Russell has 140 students taking the ICAEW syllabus, and estimates that the cost per subject per student at £40 makes the CD-ROM approach much cheaper than traditional methods, as well as offering flexibility in study.

A review of the outcomes at the National Audit Office revealed that students found the computer package easy to use and were impressed by the amount of interaction. They were able to work through the course at their own pace, and could repeat elements they were less confident about prior to the assessment. While training colleges have quoted one week as the time required to cover a subject, the CBT package enabled students to complete their studies and take the assessment in two and a half days.

It is further reported that 90 per cent of universities are using CBT packages on their accountancy courses, with banks also quoted as major users. The breakthrough into ICAEW syllabus usage is seen as very significant in the context of professional institutions' support for open learning.

Physical centres for company open learning

There is no need to set up a formal open learning centre before ODFL is introduced into a company. However, as the utilization of ODFL approaches increases, there is sense in considering whether a formal centre for open learning should be designated (Davies, 1989). Generally the setting aside of a room or rooms for this purpose, followed by equipping them with technological aids to open learning and open learning packages, points to the designation of one or more dedicated staff. Failure to take this step frequently leads to misuse of the centre, even to its despoilation. Further than this, the facility needs to be properly looked after by somebody who can support learners in using equipment and provide some basic guidance on what is available and its appropriateness for specific learning purposes.

There is a strong case for proper records to be kept on the utilization levels of the centre: which staff have visited, when, how long for and what learning programmes they have undertaken. While this may seem somewhat intrusive, this data would be automatically available for attendance on any in-company training course. Such records are valuable in defending the work of the open learning centre if it is proving attractive, or at least alerting management to problems if it is being poorly utilized. Knowing when staff prefer to attend, what topics are of most interest, and which open learning packages are proving most valuable is very important in terms of managing the centre, and its growth, on a cost-effective basis (Dorrell, 1993).

Record-keeping is also valuable for staff utilizing the centre, in terms of proving that they are not wasting company time, and in terms of maintaining a central record of their learning achievement. As ODFL grows in work organizations the open learning centre may become a main source of in-company learning, which justifies locating learning guidance services, learning support services and learning assessment work within the centre. If such centres are to achieve their full potential they must be planned in the context of company and staff learning needs overall, and not in isolation from the face-to-face training provision and attendance on external courses.

Tailor-made programmes

As ODFL moves centre stage in an organization it is likely that there will be an increasing need for tailor-made ODFL programmes rather than only off-the-shelf packages. These can be commissioned from external vendors, or designed and developed by in-company staff. The issue of cost-effectiveness looms large here. Again there has been a tendency to commission very expensive high technology-based ODFL packages which have proved of limited value in use, merely because of their exciting 'bells and whistles'. The golden rule is to employ the lowest level of technology which will fully meet the learning needs, and to ensure that these needs are fully evaluated, involving potential learners as far as possible.

Reputable vendors of tailor-made ODFL programmes will never seek to offer packages based on technologies and costs beyond the needs of the learners and the best interest of the company. Package specification should be a matter of negotiation between the vendor and the company representatives and follow a full training needs analysis.

Moving to development of in-company expertise in the preparation of ODFL programmes often increases the involvement and motivation of everyone involved. Quality is a real concern and considerable staff training may be needed, followed by much practice and piloting of materials. However, quality improvement is then possible in-house, and by a process of iteration very good quality, relevant and effective ODFL programmes can be produced. Once internal staff have moved up to the level of producing strong ODFL materials, it may prove cost-effective to produce a great deal of such materials in-house. However, it is rarely cost-effective to reinvent the wheel, and the external providers of off-the-shelf materials should always be kept in focus, especially if their materials can be modified to meet learner needs more closely.

It is also essential to ensure that a fixation on ODFL, and especially particular approaches, is not allowed to override common sense. A short learning programme required for a small number of learners on a one-off basis is probably still best delivered by a face-to-face approach, both in terms of effectiveness and cost.

CONCLUSION

The most powerful learning programmes are often those which involve a careful mix of face-to-face classes, study of open learning materials, practice of skills and application of knowledge, followed by reflection, free-choice study of literature of personal interest and relevance, and assessment of learning by appropriate methods.

The most successful trainers and teachers of adults will be those who are confident in using a wide range of approaches to learning, who network with trainers offering complementary knowledge and skills, and who can tailor ODFL programmes to meet learning needs closely on a cost-effective basis.

The following chapters take us into consideration of the choices of specific ODFL systems and their strengths and limitations. To encourage the reader to consider these seriously, let me close with some reports concerning the sheer cost-effectiveness of ODFL programmes in larger companies:

- Fuller and Saunders (1990) report that British Telecom estimated that it would cost £40 million to train its 20,000 operators to use computerized telephone exchanges. However, instead of going down the face-to-face training route, BT bought a computer-based training system for £4 million to achieve the same learning outcome and saved £36 million.
- Littlefield (1994) reports that Rank Xerox claims to have saved millions of dollars as a result of heavy investment in interactive video and CD-ROM in the training of service engineers, where otherwise real and expensive equipment would have to be taken out of service for practice sessions.
- Forlenza (1995) reports that the average initial cost of implementing a computer-based training system, including hardware, is $8 per employee per hour of training, compared to an average of $50 for the same amount of conventional classroom training.
- Johnston (1993) refers to estimates by the Learning Methods Branch of the Employment Department that the cost advantages of open and flexible learning over conventional methods ranged from 12 to 90 per cent in the training context.

Such comparisons should properly consider the nature and added value of the training, but nevertheless offer much food for thought to all involved in adult learning provision.

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15

Design and Use of Group-based Training Methods

Colin Beard and Maggie McPherson

INTRODUCTION AND LEARNING OBJECTIVES

In this chapter we will focus on the design, selection and use of group-based participative training methods that could be used in the *delivery* of traditional group-based training courses. The chapter will examine the definition of the frequently used term 'training methods' and explain the contextual setting of training methods with regard to their fit with learning objectives and teaching strategies. We will also examine the use of particular training techniques and the creative use of materials.

By *method* we simply mean *a known approach or procedure; an acknowledged practice by trainers as a way of teaching or promoting learning*. The term 'method' represents the basic level of the 'how to' of training as sub-components of the learning objectives; method in turn embraces the use of certain *techniques* and *materials* (see Table 15.1). For example, a case study is often described as a training 'method', but within such a method, as trainers we can also use 'techniques ' such as energizers, or hooks. While there is no hard and fast dividing line it is useful to recognize the sequencing as shown from left to right in Table 15.1.

Having read this chapter you will:

- understand the principles upon which to select training methods;
- understand the necessity for sequencing and pacing training;
- be able to use an 11-point checklist for considering selection and design of training methods; and
- be aware of the stages of group development.

Table 15.1 Methods as a basic teaching process

1. Examine learning objectives	**2. Consider learning styles and strategies**	**3. Select methods**	**4. Design techniques**	**5. Prepare materials**
or Performance criteria	Trainer centred	Case study	Icebreakers	Envelopes
or learning outcomes	Learner centred	Buzz groups	Energizers	Masking tape
	Consider planned and emergent learners	Syndicate	Dice games	Washable cards
	Consider need of activist, pragmatist reflector and theorist	Lecture	Attitude scales	Layered flipcharts
		Fish bowl Action maze	Role hats Deconstructing skills	Coloured pins Video cases
		Outdoor management development	Closers	Post-it labels
			Road show	
			Market place	
			Card games	
			Score cards	

GROUP TRAINING METHODS

Underpinning trainer attitudes, knowledge and skills

The trainer role can be conducted by a manager, supervisor, specialist trainer or developer and by 'role' we mean the part they play. This important role can involve the writing of training strategies and policy, design and production, delivery, and evaluation of learning programmes. For the purpose of this chapter we are going to concentrate on the delivery role.

One of the secrets to good training delivery lies with the tools the trainer uses – *the training methods*. Poor trainers can be patronizing and performance becomes an exaggerated ego trip; others can be clock-watchers, bored with doing the job. Rae (1995:xxv) refers to trainer types and trainer roles and offers a trainer grid using the three axes of teaching skills, concern and competence. This results in a complete range of trainer types from professional trainer, humble expert to endearing bumbler and arrogant charlatan! But good trainers cannot only communicate and impart knowledge; they can motivate, help people to learn, spark innovation and creativity and promote a hunger to learn. They should be open-minded and in touch with their own emotions, while letting participants explore, analyse and question. Most importantly trainers should be good questioners, careful listeners and observationally astute.

The choice and appropriate use of any training method will clearly be influenced and underpinned by the knowledge and skill of the trainer. Understanding many of the underlying concepts will help with the selection, design and use of training methods, for example:

- balancing participant challenge and support (Raw, 1991)
- learning cycle (Kolb, 1984)
- learning styles (Honey and Mumford, 1982)
- planned or emergent learning (Megginson, 1994)
- neuro-linguistic programming (Bandler and Grinder, 1975)
- reality (Binstead and Stuart, 1979)
- scheduling, sequencing and group dynamics (Randall and Southgate, 1980)
- serialists and holists (Phillips and Pugh, 1994)
- tutor dependency (Adler, 1975)
- understanding the role of emotion in learning (Fineman, 1997).

Challenging ideas can be found in this book and elsewhere about how training specialists can facilitate and support learning rather than just teaching it. These ideas have led to a fundamental questioning of some training, particularly that which is based on participant passivity, tutor dependency and over-simplified ideas of how humans behave at work.

Controversial statements made back in the 1950s by Rogers (1993:302–3) often continue to stimulate us to challenge our own assumptions:

> It seems to me that anything that can be taught to another is relatively inconsequential and has little or no significant influence on behaviour. … I find that one of the best but most difficult ways for me to learn is to drop my own defensiveness, at least temporarily, and to try to understand the way in which this experience seems and feels to the other person. … I find that another way of learning for me is to state my own uncertainties, to try to clarify my puzzlement, and thus get closer to the meaning that my experience actually seems to have.

All trainers have their own teaching style that is underpinned by their own attitudes, values and beliefs about learning. But whatever the trainer style or role, it is the knowledge and understanding of the needs, wishes and experiences of the learners that is perhaps most central to the art of good training.

Many trainers use methods with which they are familiar, but in this chapter we aim to encourage you to try out your own new and original methods that will effectively support the transfer of knowledge, skills and attitudes to participants. This is often more satisfactory than relying on 'pre-packaged' activities; any one 'method' should not be seen as a quick-fix 'solution' to a particular training 'problem'. Flexibility is required in training and development. Those participants who arrive for their 'injection of solutions' are also not taking sufficient responsibility for their development. Designing stimulating and effective programmes, often under constraints of time, money or resources, is not easy. It is important for you as a trainer to be clear about the limits of your skills: some techniques do demand a high level of competence if they are to be used effectively and safely. It is for this reason that some techniques should perhaps carry a 'training health warning'. The IPD (1998:1) for example has produced a 'Guide to Outdoor Training' because of concerns that if this 'method is not used carefully the results can be damaging to some employees – and hence their employers – with the accompanying risk of litigation'. This chapter aims to help trainers to become aware of the diverse range of training methods that currently exist, or that can be created by careful design.

SELECTING METHODS

Many textbooks on training methods have a section on choice and selection but rarely offer any real advice. There are actually few good guiding rules and so any advice usually discusses the basic variables that influence choice such as levels of understanding, objectives, time available and so on. The 'best fit' is likely to be chosen in the light of these factors, but the flow or sequence of the whole event is also a very important guide to selection.

The programme or course has a beginning, a middle and an end. The scene-setting often determines the relationship of the trainer and the participants, and thus influences what people will and will be willing to do later on. The gradual building up of energy and inquisitiveness is a essential group process that influences method selection. The dynamics of individual and group development will need to be understood by trainers; for instance, Tuckman's (1977) stages of group development: forming, storming, norming and performing. Understanding the learner dynamic is a key skill in trainer development. Balancing the control of what is learnt, how it is learnt, when, and where it is done can be subtly shifted so that greater control is given to the learner towards the middle or end of courses or programmes by the careful selection of the methods.

The characteristics of the training population will clearly influence the design process, and there are a number of basic matters that need to be considered early on. Getting hold of any training needs analysis (TNA) information is very important, and will inform the writing of the programme aims and objectives. It is essential to ensure, early on in the process, that a 'training solution' is appropriate. Learning outcomes, training objectives and performance criteria all have to be discussed and agreed by key stakeholders. They not only provide direction and focus for the training but they also set standards. In turn the objectives, learning outcomes or performance criteria will influence the choice of methods. Aims and objectives should be clearly defined and understood. It is really a joint process with the training designers and those requesting or purchasing the course or programme. The time available for the course or programme will also influence method selection. There is rarely enough time to cover everything that trainers want or need to cover, but it is very important not to over- or underestimate the amount of material that can be covered in the time slot.

Some methods will require the availability of more tutors, and tutor ratios and gender mix are generally important considerations in the delivery of training. Teams of tutors need to plan the mix of female-male where possible unless circumstances dictate otherwise. A ratio of one tutor to four trainees is recommended in the excellent *Training Skills for Women* produced by the Commonwealth Secretariat in 1984. In our experience numbers as high as 12 can be easily accommodated in some courses but discussion in such situations needs very skilled trainers to sense many of the needs of participants. Another rule of thumb is that often a minimum of one day of design and planning is needed for each day of training. Some trainers suggest there should be a ratio of 5:1 preparation time versus delivery time.

When delivering training programmes to groups of people the layout of the room and the vertical and horizontal closeness of the trainer in relation to the participants are vital factors in group dynamics. Standing up in front of the seated group means the trainer is positioned higher and apart, thus horizontally and vertically 'distanced'. This can be counter-productive if in-depth group discussion is needed.

The group culture should also be considered. In our travels around the world we have found that in parts of Asia there is a reluctance to be critical, while people in Prague told us that the older generations have been used to suppressing their emotions. The increasing internationalization of training programmes means that we all need to consider our audience very carefully. Trainers and developers can use international assignments to help to understand the broad range of cultural issues that will influence design and the selection of methods. Some people also suggest that senior managers, for example, do not want too much of 'that participative stuff'. However, when such sessions are carefully planned managers are easily encouraged to participate in productive process work. On one occasion, we remember well-dressed, very senior people willingly falling to their hands and knees to reorganize our masking tape version of their organizational management matrix which had been designed on the carpet! Age, experience, group homogeneity, and many other factors are clearly going to influence the selection and design of methods.

In these days of pressure to demonstrate good returns on training investment we must be very careful about our choice of resources. Buying in expensive materials as we shall see later is not always an effective way to proceed. It is also important to avoid over-concern with your available 'resources' too early in the design or selection of training methods. In the past some outdoor providers have provided management activities based on the recreational skills of their instructors and the materials and resources available, such as canoes, ropes and rafts. Many trainers admit to cobbling together a programme using a combination of challenging tasks and activities, using existing resources in exciting locations, and these, mixed with good facilitation skills, can often produce memorable development events. However, sometimes this is by luck rather than design and with repetition these can become less fulfilling – when this happens it is the time to take a fresh look at method design. The essential ingredients that give rise to successful courses or programmes should be a matter of great research interest to any good trainer.

Some methods will be more appropriate for the development of skill formation; knowledge acquisition; the changing of individual attitudes; and the broader company culture (psychomotor, cognitive or affective learning domains – Bloom, 1956). Lecture methods can quickly convey information as well as concepts and models. It is clear that teaching our children to swim is best carried out in a swimming pool: watching a video can have limitations. But leaving our children to their own devices, allowing learning of swimming through exploration and discovery would not be a good idea. The teaching of trampolining is now carefully designed so that individual moves are broken down into their basic constituent parts or building blocks, so that they can be tried before building the whole move. This idea of *deconstructing* basic skills or knowledge can help with the design and selection of methods, an idea that is further explored in the examples below.

'Experiential' learning could be said to be using the old adage 'I hear, I forget; I see, I remember; I do, I understand' which is a simple version of Dewey's concept of experiential learning (Dewey, 1938). But in the process of designing 'doing' methods we can move through different levels of reality and simulation. It may not always be feasible to use the 'real thing'. Van Matre (1979) has for many years helped children to understand photosynthesis by getting them inside a leaf-shaped tent, with ping-pong balls as cells so that they can manufacture sugars. The principles are easy to grasp and the experience often memorable.

'I do, I understand' should be considered with caution, for example in the training of tree-felling – it is dangerous for both the tutor and the trainee. This *can* be taught indoors first, using methods to gain basic narrow skills and to test understanding before trying the real thing with gradually increased levels of risk. Flying aeroplanes and coping with emergencies, for example, are taught using 'simulation'. How else would you teach people such as fire-fighters to perform their duties in large-scale disasters?

There are also times when participation is not the best method, such as when the information to be learned is highly technical or when information has to be put across very quickly. Much of the computer skills training that takes place today is available on the computer itself in step-by-step, on-screen programmes. Sequences and offering feedback at intervals are crucial. The reading of the manual in this case is no longer an easy and efficient way to learn.

The design checklist can be used to get started and to set the selection of methods within the broader context. The following is an 11-point checklist for consideration in the selection and design of training methods:

1. Consider carefully all the information from any assessment of training needs.
2. Examine in detail the aims and objectives – break them down into their constituent parts.
3. Decide on specific content – and themes.
4. Consider any constraints and opportunities and make it *in keeping* with the group.
5. Consider the creation a of good learning atmosphere – the physical and psychological setting.
6. Choose, modify or create learning methods.
7. Organize and check the sequence of all the methods.
8. Consider all the things that might go wrong or not work and plan for contingencies.
9. Consider methods that help the programme review, and support the transfer of learning.
10. Evaluate everything – make notes on your laptop about training methods improvements while they are fresh in your mind.
11. Feedback into future course design.

There are a whole range of learning methods and techniques based on the basic learning process of trial and error, observation, thinking, conceptualizing and imitation. These might include lectures, demonstrations, instruction, tutor-guided experience, case studies, role-play, simulations, guided experiment, problem-solving exercises and learner-directed enquiry. Table 15.1 at the beginning of this chapter illustrates a range of training methods and techniques. If possible, consider taking a degree of risk and break out of your own comfort zone and design new methods to meet the very specific needs of the people you are working with, thus avoiding the over-use of set materials taken off-the-shelf. While a disciplined approach, using well-known underlying principles, is essential in the delivery of training, the introduction of elements of creativity and originality to the design of training methods can produce events that will maximize participant learning; and they can create opportunities to help people unlearn old habits too! Some flexibility is needed: an ability to vary delivery according to people's needs and the ability to change methods as and when required allow trainers to be sensitive, thus responding to participant signals.

Sequencing and pacing

A useful framework to use in the analysis of the sequence of methods chosen is a modified version of an outdoor management development evaluation framework offered by Dainty and Lucas (1992). On the vertical axis in Figure 15.1, the task structure is 'tight' when the skill is very specific such as rope or knot work or abseiling, and it is 'loose' when the task is broad and less structured, such as a rescue exercise. Low process intensity occurs when there is a low personal focus, where self-reflection and feedback remain low. The opposite end of the lower axis involves methods where the opposite is the case and considerable self or group reflection and discussion take place.

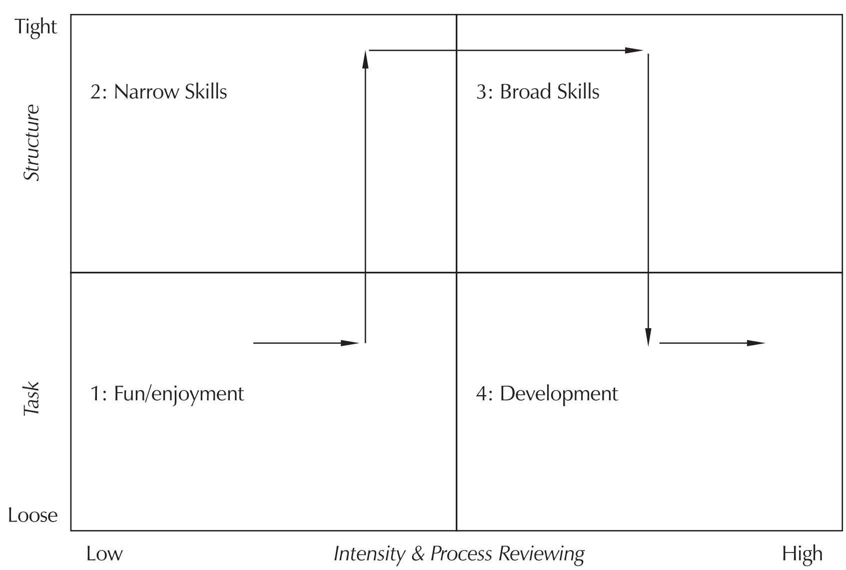

Figure 15.1 Design and sequencing of training methods

The framework thus suggests that appropriate methods are needed for each quadrant: also that the methods, in many courses, actually move through the sequence from quadrants one to four. For example, in a negotiating course the trainer might use relaxing exercises to start such as icebreakers, followed by focused skills analysis such as listening, paraphrasing or questioning, followed by tactics such as opening and closing, eventually aggregating these skills and proceeding on to broad negotiation skills. The course might then continue to look at the personal development aspects of the learning that has taken place, focusing more deeply on process work, and so on. The case study on negotiating public access to the countryside below illustrates one example of how to use this sequencing model.

The following is an activity design checklist that can help trainers to achieve correct sequencing. Decide when to choose methods that:

- set the scene and establish climate;
- start from participant levels of skill, knowledge and attitudes;
- introduce subsidiary essential skills and knowledge;
- allow regular practice after input;
- allow student-directed enquiry and study;
- regularly review the key learning or principles;
- introduce composite/complex skills and knowledge;
- relate/apply the learning to other situations and focus on transfer.

Sequencing and pacing are also considered in Tracey (1992), and Cornell's 'flow learning' (1989) allows training methods to build up group energy:

1. *Awaken participant enthusiasm* – use activities that induce playfulness and alertness.
2. *Focus participant attention* – use activities that focus the enthusiasm developed in stage 1 in ways that help prepare for the experience, absorption and exploration in stage 3.
3. *Direct participant experience* – use activities that allow opportunities for absorption and personal discovery.
4. *Share participant inspiration* – use activities that reinforce and congratulate new awareness and learning, and inspire further action.

Other patterns to consider are those of participant energy levels that are often familiar to experienced trainers. Waves of activity and participation energy are often interspersed with lulls; understanding these can be helpful for both the learner and the trainer. No one can operate at full speed all the time. After lunch, for example, is a time when the lecture method is unlikely to be productive. Trainers also learn to predict the ebb and flow of participants over, say, a week-long event, and some even have explicit 'temperature charts' for people to fill in during the course of the week to write notes on personal or group energy levels. It can then be considered acceptable to have low and high points. Mortlock talks of *Adventure Waves* (Mortlock, 1987) where adventurous periods are followed by a time for reviewing and briefing before the next wave. This same pattern can equally be applied to intellectual stimulation, practical work and group energy levels; thus trainers need to be able to read the group energy levels and create or influence the course rhythm. Pace-changing methods are therefore very important. Good trainers will try to get everyone to catch a wave! Rodwell (1994) outlines a range of 'icebreakers' 'energizers' and 'closers'.

Another dimension which trainers should consider when selecting and sequencing training methods is the degree to which reality is introduced into the training methods. The sequencing of simulation or real scenarios is a skill to develop. Some 20 years ago Binstead and Stuart (1979) explored the role and use of 'reality' strategies in learning. They suggest that if the participants see learning as having a high degree of reality to them or their work it will be approached more positively than low reality methods. But low reality strategies can be useful, allowing risk or experimentation by participants, as the scenarios are not perceived as real and thus are not threatening. Raising elements of reality towards the end of training sessions can also facilitate higher transfer of behaviours to the workplace environment. There are three elements of reality that Binstead and Stuart consider:

1. the *environment* in which the learning is located;
2. the extent of the reality of the *tasks* that have been designed; and
3. the extent to which the *processing* is real.

The case study on negotiating access shows a practical example of how participant skills and knowledge can be gradually developed as the methods embrace greater elements of reality over time. The case study on negotiating not only illustrates some of these principles, but it also demonstrates how the level of reality can be altered at the sub-ingredient level, such as the people involved, the equipment used, the information, the rewards offered and the feedback techniques used. Binstead and Stuart did not consider these factors in their research.

NEGOTIATING PUBLIC ACCESS TO THE UK COUNTRYSIDE: SKILLS PRACTICE SECTION OF A THREE-DAY TRAINING COURSE

The early part of the course uses a 'narrow skills' practice (see the Dainty and Lucas framework). Here we deconstructed 'negotiating' into its many sub-skills such as influencing, questioning, persuasion, listening, tactics, entry, developing rapport, closing and so on. The latter part of the course used broad skills practice, but with varying levels of reality or simulation.

From low content reality …

Exercise A: Redecorating the office

The material was taken from a standard loose-leaf package on negotiating. It is a paper exercise. There is no incentive. It concerns a contract price to decorate an office suite. Content reality is low. The written case material on decorating contains a review sheet that looks at the forces in use in negotiating and the approaches that can be used by the two sides. People are asked to identify opening gambits and write their answers on paper.

Exercise B: Driving a bargain

A written exercise about cars – people are told that this is a warm-up for a real car exercise when people can pit their wits against real negotiators! This adds to the incentive to concentrate on all exercises. Here the content reality is again low – these people do not negotiate car prices in their jobs.

Exercise C: Buying a new car

Real cars are used. Real log-books are used. Real car prices are offered. Car book prices are available. Cars can be inspected and faults found, both inside and outside, as they are located in the car park. The keys are made available. One vehicle is an uncleaned 4-wheel drive and the other is a nicely valeted VW Polo. The brief informs people that 'You have moved to the National Park and need a 4-wheel drive for bad weather and to tow your new caravan'. False money is used but a prize is offered. The people that the participants negotiate with are real, trained negotiators and they are located in an office where the deals will take place. Final agreements are written in sealed envelopes so that the winners can be decided later. Content reality is again low, process reality is high.

… to high content reality

Exercise D: Negotiating access to UK land on behalf of the public

Here we use high content reality and high process reality. Real negotiators are again present. Real information, eg facts and figures on sheep headage payments, ranger support offered, wall damage payments, litter arrangements, is provided. Real participants are access officers or public rights-of-way officers. They are observed on video by the rest of the group. The incentive is to try to do a good job in front of their peers, to try to put all the skills and knowledge acquired on the course into practice and try to meet their own pre-set prices and subsidy targets decided in their negotiating plans. They argue their case with real negotiators and are debriefed afterwards. The video is then replayed with self and peer assessment taking place.

EMOTION AND LEARNING

The gradual shift to increase the elements of reality requires careful attention. Over the last few years fire-fighters and other rescue services have had the benefit of using computer simulations, intelligent systems and virtual reality, which create emergency scenarios that are very close to reality thus enabling very exacting and demanding training to take place (see for example www.coltvr.com/vector).

Some training methods use drama therapy or theatrical style role-plays that also enable the balance of reality and simulation to be altered. One example is described in the UK IPD journal, *People Management*, where the hypothetical and the actual became accidentally blurred for the Hereford Hospital Trust training programme (Merrick, 1998). Complex training programmes have also been recently designed to use methods of role-play and simulation to help the police and social workers deal more effectively with child abuse; but for some people the simulations can come too close to their own life experiences. Professional actors have often been brought in to ensure that their skilled abilities enhance the simulation while reducing the emotional risk to course participants. The design of training methods in emotionally laden areas or in the field of emergency service work is exacting and requires considerable trainer skill. Here we recommend a cautious approach.

Fascinating articles have appeared in journals (eg, Fineman, 1997) addressing such areas as the role of emotion and risk in learning. Method selection sometimes needs to ensure that people are more in touch with their emotions so that they may learn more effectively. What and how learning takes place is clearly inextricably connected to participant motivations and emotions. Alongside the dangers outlined above we now consider the role of fun, play, risk and emotion in the choice and design of learning methods.

Trainers do need to know when to encourage learners to 'let go' of their obsession with success, performance or grades, and when to enable learners to relax and make greater connections with their emotions and feelings. How many times have we failed in an interview because we were nervous, or not performed well in a sport because we were too tense, or not delivered a very good speech because we were not relaxed? How then do trainers connect participants to these feelings? It is certainly crucial for trainers to be in touch with their own emotions and feelings, and those of the people they are working with, whether it be anger, humour, anxiety and so on. Carefully designed methods can help to tune into these feelings when it is required or appropriate to do so.

Humour in learner-tutor correspondence on distance learning programmes also gives us ideas about how people are able to gently expose some of their true feelings about their work. The following extracts are interesting:

> This presentation is a vast improvement on your first assignment from which my optic nerves are still recovering. (Said my tutor on reading my second attempt, as a mature student, at using a draft standard dot-matrix printer some years ago.)

> Positively my last fling! You asked for 'lots of comments' – and I have surpassed myself and I am now off to immerse myself in an extremely large gin and tonic. Not to drown my sorrows but merely to recuperate. (Said my tutor on reading the last edition of my 'draft' dissertation!)

Some student humour during the stressful last leg in the period of doing a research dissertation in training and development:

> Would it be better to lump the data together? What do you think? Does it make sense? (Sounds like a song!) The razor blades are in a safe place (but I can't help noticing that length of rope in the garage!!!!) I will phone you soon for some quality psychotherapy. Regards …
>
> P.S. someone told me you can buy these (dissertations) on the world-wide web?' (Extracts from a letter to me as a tutor, from a senior training and development officer at a major UK hospital studying for a Master's degree.)

> Well, it's now 12.30 in the morning and I think I should go to bed. This has been a useful exercise for me, even if tedious for you. I look forward to any pearls of wisdom you may wish to cast in my direction. Goodnight! (A senior training manager, London Underground.)

> Dear Colin, I have added to my draft in the past two weeks but still feel frustrated by a lack of real headway, combined with a growing feeling that I'm not really sure what I'm doing!! (Training Manager, Magistrates Courts.)

It can be important for participants to be in touch with these emotional responses and to pass on these stories and tales, and myths and legends to other students to set a positive agenda and culture for future groups. What role does emotion play in the development of innovation and risk-taking in learning for example? Raab (1997:161) from Melbourne University examines the anxiety problems that occur when the trainer avoids becoming the expert. In her article,'Becoming an expert in not knowing – reframing teacher as a consultant', she begins with a story that:

alerts us to the terrible anxiety experienced by both clients and consultants (students and teachers) when forced to stay in the present and face their unknowingness. Traditional models of teaching operate without acknowledging the extent of this anxiety.

Difficult subjects

In the IPD's *People Management,* Pickard (1996:28) noted that, 'Innovation is experiencing a renaissance.' The article went on to comment that the UK Department of Trade and Industry has an Innovation Unit; there are now MBAs in innovation; two-thirds of secondary schools in Singapore teach 'constructive thinking'; and in New Zealand children as young as two are being taught to think creatively. Trainers can of course use training methods to create a climate of creativity, fun or play, thus generating risk-taking or innovation. The following are practical examples that highlight the use of creative training methods to teach difficult subjects.

CREATIVE TRAINING DESIGN: RESEARCH METHODOLOGY TRAINING

This method uses popular images or fictional characters to help participants to understand the complex world of 'research methodology'. Careful selection of popular images that are well known to most of the participants can be helpful: the use of Shakespearean quotations can sometimes be risky! Many learners have found that when embarking on a piece of research, research methodology is difficult to understand. Thorpe and Moscarola (1991:127) in an article that inspired this experiment, comment that: 'they see research as following elaborate rules and procedures and see it as something that is both complex and difficult'.

I first tested out my new method with overseas students in Singapore. I was charged with delivering a session to Master's students who were human resource managers operating in Singapore, Malaysia and China. Methodology was full of academic, unknown language – deduction, validity, reliability, triangulation, ontology, epistemology, hermeneutics, ethnography – all very confusing.

Stage 1: Start with the known and the simple – and make it fun

The approach I have now developed involves starting from notions of four consulting role models – detective, doctor, travel agent and salesperson. The 'consulting styles' are described in Margerison (1988) who said that: 'We all have an approach to giving advice based upon a consulting model. It may not be written down, but it reflects itself in the way in which we consult and give advice.'

Having read about the four roles the key words associated with each are written out by participants on washable cards and then examined and discussed. Students describe how such people conduct their work as follows:

The medical analogy: the doctor

- client/organizational illness to be cured;
- looking for good/normal health, or unhealthy organization;
- symptoms;
- diagnosis;
- medicine is prescribed;
- operation – cut out unhealthy bit.

The travel agent

- assumes client is on a journey;
- go through their objectives and work out best way to destination;
- question-based – how much money are you going to spend?
- client-focused;
- suggest other destinations.

Stage 2: Engagement

Students then examine the four consulting styles and discuss their *own* consulting styles.

Stage 3: Take a step closer to the unknown – using popular fiction

Students then move on to focus on the art of detecting or *investigation* – investigation is essentially what research is about. They examine five detectives, described in Thorpe and Moscorola (1991): Hercule Poirot, Sherlock Holmes, Maigret, Columbo and Dirty Harry. All five detectives have their different approaches and the students relate well to 'research as detection'. This approach is, however, being supplemented as all the characters are male. Overseas students know a great deal about famous global detectives – for me the risk paid off. A profile is provided for each detective and key words are extracted based on their reading small profiles and their own knowledge:

- science and microscopes (Sherlock Holmes);
- proven fact;
- listens and tries to understand;
- prods and pushes (Dirty Harry);
- unconventional;
- deductive reasoning;
- chemical testing;
- facial observations (Columbo);
- intuition.

The creator of Sherlock Holmes was Sir Arthur Conan Doyle who studied medicine at Edinburgh University, where the methods of diagnosis of one of the professors are said to have provided the ideas for the methods of 'deduction' used by Holmes. Medicine and detectives had common links. All of these words associated with detecting can, with care, relate to recognized research perspectives. Research is a form of investigation.

Stage 4: Slowly move into the unknown: research perspectives and language

The participants then move on to consider two fictitious dissertations and the appropriate methods of investigation:

1. The effect of height on performance in high-rise towers in Singapore.
2. Myths and legends in training and development.

Participants compare the research approach for the two investigations. One clearly lends itself to quantitative studies, perhaps using scientific approaches, focusing on statistics, proof, evidence; has some degree of neutrality towards the research objects … and so on. The other study is qualitative in nature, uses people's perception, attempts to describe and understand meaningful social action; is subjective, and where no group values are wrong … many other key words are present on plastic cards and the group sort the words and allocate them to one or the other type of investigation.

Moving on from polarized dichotomies, students consider the complex mosaic of research perspectives. The methodology debate unfolds in front of the students without them realizing they have acquired some of the language of methodology. They argue and discuss the meaning of truth and the nature of what can be known or what is real.

Stage 5: Developing a kit

Eventually this was designed as a whole 'kit' involving a plastic briefcase, a video containing Dirty Harry and Poirot film extracts, pre-prepared instructions, washable cards – some blank and some with key words printed on them. Empty old video cases were used to house the sets of cards per kit. Labels were designed and printed on A4 paper to insert into the video cases. The principal journal articles were also included in the black plastic portfolio case.

Storytelling

Considerable skill is called for to develop good psychological settings for training and development programmes. Stories can be a good way to relax participants on a programme, and they can be told for many reasons, sometimes just for light relief. They can also re-engage people after lunch, for example. They are as important to adults as they are to children. I often like to tell stories when the mood is right; of the day I missed the helicopter for an interview on the Scilly Islands; the time when my frog died on me in my zoology exams and my subsequent failure to resuscitate it!

Storytelling has revived in popularity and many people have recently experienced the wonderful stories told by North American indigenous people now living in Britain. Stories and metaphors can also be used by trainers with a message to get across, and Parkin (1998) in her book on storytelling for trainers tells how they can be powerful training tools. Gathering groups of learners to tell stories and to find meaning in them is becoming an important tool in personal and organizational learning.

PLAY AND FUN

A story-telling approach to the *evaluation and review* of training methods is very easy to construct and has many applications. It consists of a booklet of strips of paper, cut from an A4 sheet that has typed statements on it. The strips are then stapled together to form a booklet. In pairs each partner reads out and finishes off the sentence with a personal comment and then passes it back to the other partner. It can be used for process work, and is good for personal development programmes. The statements could include:

The session I *enjoyed* most on this development programme was …
The things that *stimulated me to learn more* were …

The most *productive* …
The positive part of *working as a team* on this assignment was when …
The contribution *I valued most from you* as a group member was when …
Something I *learned about myself* was …

Good learner-centred reviewing techniques allow people to:

> express themselves and their experiences, examine issues and concerns, explore new ideas and thoughts, gain emotional understanding and enjoy themselves. (Greenaway, 1993:17)

PLAY AND FUN: COFFEE AND SUNDAY PAPERS – 'PLAYING WITH THE LITERATURE'

At a weekend at the residential training centre of the Department for Employment in the UK in April 1997, 30 mature students (who were training managers studying for a Master's degree in Education, Training and Development) were part of a very simple experiment. I decided to offer a session that was designed to allow students to *play* with their ideas and concepts following a period of quiet reading and sharing of thoughts over early morning coffee and biscuits. We used the idea of lounging about reading the Sunday papers – but used journal material from a range of well-known sources: *People Management, Management Learning*, *Management Education and Development*, *People and Organizations*, *Training and Development*, *Industrial and Commercial Training*, *Sloan Management Review, Harvard Business Review*, and many others. Included in the material were articles that encouraged students to be aware of themselves as learners or their uncritical reception of 'material', such as the article by Tony Watson (1996) on 'Motivation: that's Maslow, isn't it?' We were encouraging students to become more relaxed about the 'literature' associated with their subject, to encourage them to share, become fascinated, get copies of lots of material and communicate their findings to each other.

As a tutor I acted merely as a scribe and facilitator – letting go of my concerns about my expertise and as a result the sessions produced much debate. The evaluation of the session subsequently showed that students wanted more time in future to repeat such an exploration of a broad range of literature and to play with concepts and ideas in this way. This is of interest as participative techniques are often said to be very time-consuming and lack depth of content. This perhaps is a short-term view – depth and content have to be considered in relation to medium and long-term student learning.

A funny video tape for 7-year-olds from the international children's store, the Early Learning Centre, was designed to improve counting skills. Children do the voices with wonderful effect. It is called *Cecil was a caterpillar.* Cecil grew and grew by two centimetres every time he ate a fellow caterpillar. He became enormous. But then he shrunk to two centimetres – 'What have you done,' cried a girl friend. 'I've been sick!' exclaimed Cecil. It seemed a really good medium to introduce feeding and trophic levels, biomass and energy waste to undergraduates. Trivial? It is extremely funny and seems to get the lecture off to a good start, and the concentration levels continue to be high. But why? Is it fun, play, relaxation? Why does a simple tape of just three or four minutes extend student concentration levels well beyond the 15–20 minutes norm? Does this act as a 'hook' to engage the majority of people at the start of the session?

Garratt (1987) refers to the fact that intellectual property is a key tradable commodity; and that nurturing, harnessing and capturing this will be the key to future success. Participants can of course be useful in the design of training methods and materials. One database was collected over many years by simply designing training programmes to find out what the audience knowledge levels were. They collected facts by researching pre-prepared material that was presented in large envelopes with specially designed covers. The information that participants researched was written up on cards and these were all collected up each year and new information was continually added to a computer database. The latest result, 15 years on, is a book of facts and figures about the environment in the UK for a period of some 300 years. This method uses the notion 'participant intellectual property development' (PIPD) as a vital tool in the development of training materials. In training in the use of feedback and criticism, trainers can collect live anonymous material such as letters of complaint to and from firms, letters of apology, or memos collected from within the workplace. In delivering sessions on evaluation, trainers can collect real samples from all over the world over many years, and participants can gauge which are best and why, and form a spectrum of good and not-so-good evaluation methods and forms.

VISUALIZATION, REALITY AND SIMULATION IN LEARNING – TREE-FELLING INDOORS!

One participant on a training-the-trainer course decided not to do a training session on day three of a five-day programme. After some discussion it transpired that he lacked the confidence to 'stand up front and deliver a session'. His session, however, turned out to be very creative and it resulted in the best peer review. He took tree-felling and safety as his preferred theme – difficult, but he knew lots about it and felt he could pass on a lot of knowledge, and because the outdoors was where he felt comfortable. I explained that he could not really have time to conduct a real session in the outdoors in 20 minutes. So he brought the woodland indoors!

The session used paper and card, together with other real props, rolled up flipchart paper and masking tape. Real saws were used to demonstrate ideas and most of the techniques were taught by participants imagining what they would do next. They were encouraged to look up into the imaginary tree and think about and comment on the wind direction, the places where the heavier branches were, etc and to try to work out the direction the tree would be best felled. Tape was used to show the direction of fall, the safety zones, the danger zones and so on. Most of the group came out to the front (the middle of the floor space) to have a go at something.

USING MATERIALS CREATIVELY

The effectiveness of training methods can often be considerably enhanced by using support materials in a creative way. Masking tape and pre-prepared cards can be used to help participants recreate conceptual models, or design organizational charts or company reporting structures. We have already looked at the use of popular images, recycled video boxes and washable cards. Television programmes and advertising footage contain a wealth of material that can easily be put on video. Paper booklets can easily be created; flipcharts can be cut to form layers with pre-prepared information on each layer; instructions for participants can be placed in specially designed envelopes or plastic cases; trainers can put pencil outlines on flipcharts as reminders – no one can see them in the audience and coloured sticky markers are useful to mark flipchart sheets so that trainers are not fumbling to find the right sheet.

Training methods can also incorporate card games, eg in communication exercises, allocated cards can allow participants so many slots to speak. Dice exercises, score cards, 'behavioural hats' (see for example de Bono's 'hats' in Rodwell, 1994:136–9) or road shows can also be incorporated. The possibilities are endless, and trainers can develop a whole toolkit of materials and resources that can be ready to support the delivery of their training methods and create a more professional approach. David Leigh (1996) suggests a basic survival kit list for trainers to carry, as well as lists of tips for trainers.

CONCLUSION: THE FUTURE OF TRAINING METHODS

The world is changing and, in his crystal ball gazing, Megginson (1994) was supposed to look into the future. He anticipated tree of knowledge briefcases (TOK cases), cyborg technology, learning techneurology and other virtual and fictitious ideas. However, within four years of writing the article, many of his deliberately controversial ideas had already materialized! While the company induction brain chip implant is not yet available – thank goodness – the video/TV/telephone wristwatch is here, and companies now offer 'greater learning through relaxation'. Lifetools, for example, offer special effects of hypnotic light and sound pulses to help people to relax, or to energize, and visualize. Arthur C Clarke is said to have predicted in 1945 that orbital satellites would revolutionize communications, but his ideas were regarded as too far-fetched and not worthy of consideration! The future is going to be exciting for trainers and developers.

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16

The Selection, Design and Use of Individualized Training Methods

Maggie McPherson and Colin Beard

INTRODUCTION AND LEARNING OBJECTIVES

In the last chapter, the authors concentrated on methods of training suitable for situations where it is possible to get a number of people together for group training. However, as organizations move into an era where staff need continual updating of skills, it is not always possible or viable to arrange group training sessions. Nowadays there are not only new opportunities for providing alternative learning environments, but different and stimulating relationships can be developed between the tutors and learners. Moreover, technological developments have opened up the possibility of minimizing the need for direct classroom contact between trainers and learners.

Nevertheless, some delivery methods are more suited to one situation than another, and the method of delivery must enhance the learning process as far as possible. It is important that trainers and educationalists are not seduced by smart technological solutions if their learning aims and objectives cannot be achieved by this means. They need to recognize that they are not obliged to adopt a particular learning strategy simply because it is possible to do so.

When individuals are required to study independently, their learning frequently takes place in the form of private study. In addition, the location in which the learning is carried out can be totally remote from the teacher or trainer. This type of study is often described as 'open, distance and flexible learning' (ODFL) (see Chapter 14). In an open learning environment, learners have, to some extent, freedom to determine the content of their study, how they carry out their study, and at what pace they study.

The versatility of ODFL can enable the learner to decide what materials to use and how to use them. In turn, this allows individuals to take responsibility for their own learning and personal development. To this end, the learner is sometimes offered the facility of a 'open learning resource centre' which they can visit at times which suit them. Some specific advantages of providing opportunities for ODFL could be summarized as follows:

- Individuals can take more responsibility for their own learning and personal development and make use of their own experiences in learning process.
- Learners can have more choice over content and take a self-directing approach.
- Learning can be organized to include relevant individual practical experiences.
- Part of the learner's study programme can be set up to either include or exclude assessment and examination as desirable.
- Individualized learning can be more cost-effective where provision is being made to learners who are remote from the learning centre.
- Technology can be used to assist the learning process.

We intend to provide some examples of the above and hope that by the conclusion of this chapter, you will feel able to assess some of the opportunities that exists for a wide variety of individualized training and/or educational materials and delivery methods.

Having read this chapter you will:

- be aware of how to use multimedia for training;
- understand the term 'just-in-time training';
- understand the nature of multimedia conferencing; and
- be familiar with a range of training methods.

MULTIMEDIA FOR EDUCATION

Education, as we know it, is undergoing some revolutionary changes and is becoming a lifelong process. The key skill in this process is learning to learn. It is anticipated that 'lifelong learning' will become much more widely available, will take place everywhere, and will be tailored to individuals using multimedia technology.

Over the past decade the growth of multimedia programmes has been spectacular and it is extremely difficult to undertake a complete enumeration of all multimedia projects in the market place. The range of academic multimedia products already available is simply staggering, and many of these may only be discovered 'accidentally' because their authors use them for only a tiny proportion of the course they are conducting.

One of the difficulties in trying to classify the materials is the sheer diversity of intended use of multimedia. In a number of instances, the work is not published in academic journals, because developments of such types are not universally recognized as 'legitimate research'.

There are many small-scale developments undertaken in universities around the world, intended for illustration of specific points of theory or practice in an academic subject. Equally, many good examples may be found for teaching specific techniques, in medicine, dentistry, engineering, speech therapy, legal studies, etc.

UNIVERSITY LIBRARY – HARTLIB PAPERS HYPERMEDIA DEMONSTRATOR PROJECT

The University of Sheffield Library houses the Hartlib Papers, a 17th century collection of archives amounting to more than 25,000 pages and more than 20 million words, including manuscripts, letters, memoranda and diaries. It also includes works by Descartes, Milton, Pym, Pascal, and many others.

This collection is so rich as to be potentially overwhelming, because of the sheer volume of information and the fragility of some parts of it. Using hypermedia access methods, the joint project between the university and the Employment Department has unlocked some of the riches from the collection. It allows remarkably wide access to a range of subjects: science, history, religion, politics and literature, spread over some 150 documents.

The demonstrator project (the subject area was bees and bee-keeping) found that hypermedia cannot easily provide access to large amounts of *unstructured* materials, but is well able to cope with *structured* information, and the methodology is potentially transferable to other large-scale information stores.

Applications of multimedia in education include improved access to resources through the development of relational databases of multimedia materials. Traditional relational database vendors have been enhancing their products to allow multimedia elements. In addition, there are new object databases that have been specifically designed for this purpose, offering significant usability advantages.

LIVERPOOL JOHN MOORES UNIVERSITY

In conjunction with Liverpool Women's Hospital and Interactive Designs Ltd, Liverpool John Moores University developed an extremely powerful yet remarkably user-friendly multimedia database (mediabase) categorization, organization and presentation 'engine' named THESEUS. This allowed massive multimedia databases, consisting of high-quality graphic images, video clips, photomicrographs and QuickTime movies to be organized and accessed in a variety of ways corresponding broadly to different learning models.

For example, academics could prepare 'multimedia tutorials' in their discipline for students to follow interactively, but according to some predetermined educational objective. The materials could be organized in a broadly 'linear' form, or according to a more eclectic view of the learning process. Students following the courses which used THESEUS could create multimedia 'essays' (for submission and evaluation by tutors) by collection of multimedia objects from a massive mediabase, organizing and annotating these for their own use and for assessment purposes, and a range of other different modes of use.

Initially, the most effort was put into the area of cervical cytology, designed to assist in the first year training of cervical screening lab assistants, responsible for examining cervical smears for incidence of abnormalities, possible cancerous tissue and other conditions that might require medical treatment. This particular THESEUS package contained over 3500 microscopic images, video clips and interactive exercises for cytology technologists, in its own mediabase which is hyperlinked by over 200 instructional lessons.

A later product, CytoVision was an interactive videodisk containing high-quality images and video sequences, driven from a Macintosh computer. There were plans to put the materials onto CD-ROM and possibly to port it to other hardware platforms. The Cytology Project was in essence a proof of concept, the intention being to provide a wide range of specialized study units and educational activities in a new learning resources centre, equipped for full multimedia learning. Future course developments, such as the university's wider adoption of the THESEUS approach, were to be coordinated via the Open Learning Unit. Some evaluation was conducted in the use of multimedia approaches in learning cell biology, from which the results gave some cause for optimism in the use of this way of interactive learning.

MULTIMEDIA FOR TRAINING

Another major market area for multimedia technologies and delivery systems is that of training for business and industry. In the commercial environment, it is again more often than not the case that the materials developed are for in-house use only, particularly where the multimedia title has been created to support staff training and development.

In many cases, these materials will have a clear and direct link with the organization's own market aspirations, and may well have been tailored to address specific business improvement issues. This type of training is likely to be delivered close to the time when the individual will apply it and is sometimes described as 'just-in-time training'. For instance 'just-in-time training' may include some of the following:

- new product training;
- new market opportunities;
- product development;
- market development;
- product diversification;
- market diversification;
- customer service development;
- total quality management (TQM) focus;
- aspects of business process re-engineering (BPR);
- new employee induction.

The format of the traditional short course (two days with a torrent of information) could be replaced by, say, a three-month, on-line course, with regular tutorial and seminar video-conferencing sessions at your own desk or office, supported by web access and multipoint data conferencing.

This new training model could mean a reduced disruption to working hours, as training could be fitted in as convenient, with an increase in the application of the information imparted due to it being made available over a longer time span. Additionally, the back-up provided by the technological developments of multimedia communications services makes support and reinforcement very much easier today than it has been in the past.

ESCOM CBT

The Employment Service is committed to using its network systems to enhance and facilitate good working practices and to increase the economic efficiency of its day-to-day operations. Based in Sheffield the ESCOM team has been responsible for commissioning and supervising the installation and introduction of an electronic documentation system. Documentation is a big issue for the Employment Service; with 1100 local offices required to satisfy national legislation, initiatives and guidance it is vital that information is up-to-date and accurate.

Previously, all information has been distributed in paper form and this has required extensive storage and cataloguing in local offices, particularly in managing new versions of information. In addition, printing costs have been high for the Service.

The new electronic library of information (ESCOM) is being made available on the majority of networked PCs in local offices. Updated centrally, and allowing local variations to be entered, it is intended that ESCOM will ensure consistency and currency while reducing costs and increasing efficiency.

The training requirement

Though some information continues to be made available in printed form it is intended that this will be reduced as far as possible. The scope of information held by ESCOM – from internal telephone directories to current eligibility guidelines for benefit claimants – requires all staff in the Employment Service to be fluent in its use. Those joining the Service in the future will be required to develop these skills before they can become fully operational. There are a large number of people requiring training and they are distributed across the country in local offices.

No recorded assessment of students' progress and achievement was required as performance on the job can easily be measured in this instance.

A modular structure was required to allow students to study reasonably sized 'chunks' at their own pace and to study successively more sophisticated uses of the ESCOM system as and when required. (As much of the ESCOM system as possible is based on fundamental Windows concepts. As staff, particularly when joining the service, may have only limited knowledge of, or skills in using Windows, an additional optional module was required to introduce these concepts, eg, an application window containing multiple document windows; maximizing and minimizing windows; the active window.)

The solution

The distribution of users, the requirement for training to be available at any time, and the electronic form of the target skills made CBT the obvious solution to the training need. Additionally, the Employment Service already uses CBT and other electronic forms of support and is committed to using its network resources to make training available to employees.

The specification of the PCs used to deliver the training to staff varies considerably and it was agreed that the CBT should run at a display resolution of 800*600 and 256 colours. The authoring system, IconAuthor, was specified by the Employment Service to comply with their internal standards.

Students are also supported during the CBT and their actual use of the ESCOM library by a pocket-sized card that summarizes the toolbars, icons, etc. All staff have access to support from their local office systems administrator.

The CBT totals approximately two hours in eight modules, plus an additional module on Windows concepts. The development of the CBT commenced in April 1997 and the completed modules were delivered in September 1997.

The CBT

The CBT was designed to be highly interactive, using simulations of the library system as its main learning mechanism. Concepts and techniques are introduced using text, graphics and animations and the student is then guided through a simulated use of ESCOM using the concepts and techniques. Test exercises at the end of modules offer students a chance to practise their skills without guidance. Outcomes of the test exercises are assessed and the student is given appropriate feedback, including suggestions for remedial action where necessary. Modules and tests may be used in any order and can be repeated. Students can use the exercises as pre-tests to determine whether they need to study a module.

The necessity to simulate the ESCOM system on the majority of screens, coupled with the constraints of the delivery resolution, led to the development of a 'floating panel' approach to controls and guidance. These were distinctively coloured and are also used to give a corporate 'look and feel' to the CBT.

As far as possible, keyboard input has been kept to a minimum throughout the CBT, with most interaction using the mouse. This had the benefit of allowing students to concentrate on using the ESCOM library rather than on correctly entering text; it also reduced the text parsing elements of answer checking to a minimum and allowed feedback to concentrate on the student's skills with the essential elements of the library. Simple devices such as 'hands on' and 'timed answer' icons are used to cue the student throughout the CBT.

Planned benefits

The benefits of using CBT in this project are those which are commonly used to justify CBT and include:

- Training is available on demand.
- Consistency is ensured.
- Training can be self-paced, with later modules only being studied when the techniques being tackled are required.
- The geographical distribution of students does not affect the availability of training.
- Introduction of the ESCOM library system can be speeded up.
- Initial user tests of the CBT showed a good outcome and the ESCOM system has been introduced. Further analysis of acceptance and success are to commence shortly.

With acknowledgement to Sarah Wilkinson of Dean Associates.

MULTIMEDIA CONFERENCING

Multimedia conferencing can be defined as two or more users simultaneously exchanging information (voice, data, image, and/or video) in an interactive fashion. Typically, this takes the form of videoconferencing with data conferencing as an adjunct. It may take place with or without the help of an external agent, such as a host or switch, eg, Multipoint Control Unit.

The conferencing services that are evolving may be classified into the following categories:

1. videoconferencing;
2. image conferencing (graphics);
3. data conferencing;
4. multimedia conferencing (combination).

These conferences could take place either at a common facility on the premises, or eventually at the user's desktop. The common element of all these modes of conferencing is the fact that they will all evolve as desktop-based personal services as opposed to common-location shared facility services.

Some of the requirements, as we have seen, include the evolution to:

- standard conferencing protocols;
- viable premise access facilities;
- suitable and affordable workstations;
- intelligent signalling and switching networks;

- very low transmission cost;
- sufficient user applications.

However, while having mixed (or even 'multi') media types available through a common interface is of major user benefit, this does create new challenges for the developer and several technological, economic and standards-related problems must be solved before these services do manage to find their way to the desktop.

Capturing a still image, or page of text, is quite different from a clip of moving video and despite advances in technological development, continues to present some difficulties. Displaying a still image is a singular event, and whereas a document may have several pages or chapters, a sound clip takes a finite time to play, as does a video clip, and when a number of these objects result from the same search, a playback/viewing/listening framework is essential. Combined text/image pages pose special problems, and multiple capture methods can be required. 'Thumbnail' images are frequently used to speed operation, with the full quality images only displayed from selected thumbnails. In some cases it may be more appropriate to only order the full quality image, for subsequent delivery after printing.

Now let's look a bit closer at some of the real applications of multimedia videoconferencing technology in use today. These can generally be partitioned into three broad categories, depending on the number of sites and the presence or absence of interaction, and there is overlap in some cases:

- *multiparty interactive* – multimedia conferencing, corporate training, business meetings, collaborative computing;
- *two-way interactive* – kiosks, expert systems, multimedia data sharing, multimedia databases;
- *one-way passive viewing* – television broadcasts, corporate announcements, hypermedia.

Multipoint (party) conferencing is the most demanding in terms of real-time criticality and the amount of bandwidth required. Many view this is as *the* IT application that will drive the computing industry forward over the next five years, much as spreadsheets kindled the sale of personal computers in the early 1980s. However, it should be recognized that videoconferencing is not so much an application as an application-enabler.

One of the initial catalysts for broadband networks has been the medical community. X-rays, CAT (computerized axial tomography) scans, and MRI (magnetic resonance imaging) all require high resolution images for accurate diagnosis. Multimedia systems are appropriate in this sector for a number of reasons:

- imaging plays a significant role in medical diagnosis;
- multimedia networks can distribute x-ray images, enabling scans to be distributed to the community of specialists for expert interpretation and analysis wherever the specialist may be located;

- multimedia systems have an immediate role in reducing the cost of health care, meaning that more patients are treated and greater use is made of limited specialist resources.

A number of regional trials have been set up linking hospitals, and the medical field has been involved in other applications of multimedia communications, such as the case of the Royal College of Surgeons.

TELEMEDICINE: THE ROYAL COLLEGE OF SURGEONS

The Royal College of Surgeons (RCS) implemented a videoconferencing network for the teaching of minimal access therapy (MAT) techniques – otherwise known as keyhole surgery – for which it has been developing a series of training standards. Keyhole surgery facilitates faster recovery times and hospital beds are occupied for less time, thus reducing costs for the health services.

Funded by the Department of Health and the Wolfson Foundation, the training programme was designed to deliver high standards of training for surgeons who practise laparoscopic surgery, and is centred on the need to demonstrate the surgery in practice. Training sites are located at the RCS, with partners at the Royal Surrey County Hospital and the Royal London Hospital.

Because the development team wanted the network to provide duplex communications, enabling the surgeons to ask questions and receive instant replies, they finally opted for an ISDN-based system. This uses pictures in picture displays allowing the students to see both the operating theatre and the images of the surgery that is taking place inside the patient's body. Sessions can be recorded onto videotape for editing and subsequent use in training programmes.

VIRTUAL REALITY TRAINING

Virtual reality (VR), which has long been the preserve of the amusement arcade and flight simulators, has finally come of age as an affordable business tool and is now being used in business training. It involves the use of computers and (sometimes) 3D headsets allowing a user to visualize and interact with a simulated (virtual) environment.

The increase in PC processing power has enabled real-time 3D interactive environments to be delivered straight to the desktop. Now, VR software packages such as SuperScape VRT, WorldToolKit and Realimation require very little advanced programming expertise and allow users to create and explore virtual environments. They can be operated from the desktop, be wired to immersive technology (the headsets or goggles), linked to a projector for audience presentations, or distributed over the Internet.

The widespread adoption of other forms of computer based training (CBT) has enabled organizations to see the benefits of VR training applications, making the training sector the fastest growing area for VR.

THE VOLKSWAGEN GROUP – VIRTUAL REALITY TRAINING

Prior to adopting VR-based training for its 300 dealer staff, VAG had used multimedia as a training tool over an 18 month period, to develop 22 training packages. The dealers felt so comfortable with multimedia training that 'they had become blasé about multimedia'.

VAG decided that it needed to create a multimedia library of documentation and vehicle manuals and a technical electrical assessment test, and wishing to make the dry subject stimulating, resolved to opt for VR training.

They created (with a multimedia design company) a control interface that allowed the trainee to select tools, choose replacement parts, perform project management and change views. A virtual viewing area allowed navigation around the vehicle, viewing of detailed (virtual) photographs, manipulation of test probes and positioning of replacement parts.

The programme featured a virtual electrical test card on which the user must try and verify the fault and then fix it by selecting the correct circuit diagram, going to the relevant area to reveal detailed wiring and choose the correct tools for the job. The whole process is logged for future retrieval and review.

One of the aspects that VAG was most pleased about was the VR 'audit trail' which accounted for thought processes, such as picking up and viewing a piece of equipment from a particular angle – in effect replicating the physical environment. VAG considered that VR training had been an economic success, since waste could be reduced by being able see the exact fault before parts are ordered.

THE A–Z OF TRAINING METHODS

In this final section we will attempt to provide an overview of a number of the alternatives available to you so that you can decide the most appropriate delivery method to use for particular learning needs. Table 16.1 outlines a number of training methods and techniques that can be used in both group-based and individual training. It is based on a similar outline provided in the MA IT Management distance learning programme offered by the

Department of Information Studies, University of Sheffield. Please note that the list has been arranged alphabetically, not in order of importance.

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Table 16.1 The A–Z of training methods

Training/system methods	Trainer's perspective	End user's perspective
Action Learning Sets		
Action Learning sets involve a group of people convening to bring to the set real work problems. They act as comrades in adversity, supporting and challenging each other. Each participant works on their problem between set meetings and brings new information and solutions back to the group.	Degree of interdependence of group members Trainer can help to establish learning set or act as learning set adviser. Adviser can offer support or help line and guide process if needed.	Typically, the group meets once a month for half a day over a period of six to nine months. Learning through questioning is very powerful.
Action Maze		
Similar to a case study, but uses printed instructions to guide a group through to a pre-determined conclusion. It is called a maze because choices and options are offered at certain stages – rather like a pathway. Set situations will result from the choice of option. Discovery of preferred paths is the main outcome of this exercise.	Can be useful for problem-solving or decision-making. Requires careful design. Allows participant interdependence.	Incorrect decision-making can result in high levels of learning – learning from mistakes is good!
Brainstorming		
Creative ideas from participants. Group is allowed to submit ideas or suggestions and none are rejected. No discussion and no value judgements are made at this stage. Subsequently all ideas can be sorted and assessed in any way. Exploration can produce exciting results!	Allows trainer to quickly gather information as to the levels of knowledge of the participants. Allows the generation of a lot of ideas in a short space of time and creates a climate of creativity.	Good fun and very creative allowing a lot of participant input with no discussion. Most people can contribute without much effort. Participants feel a sense of ownership of the ideas.
Business Game Simulations		
Dynamic exercises or case studies – usually involving 'coming to terms' with a situation, then managing it via a set of imposed decisions. Computerized models offer complex data and often decisions that interact.	Interactive element generates enthusiasm, notably when teams are in simulated competition. Can be linked with team development. Model can be challenged as unrealistic.	Offers practice in management – observation, analysis, judgement, decision-making, etc. Can instil confidence.
Buzz Groups		
Small groups, often formed after an input session, answer a set question or complete a set task and report back to the trainer or the rest of the group.	Avoid one group giving all the answers and leaving nothing for the other group to offer. Very participative and a larger number of contributions can be offered in a short space of time.	Helps rapid knowledge gain and starts trainee thought processes. Good group support engendered.

Table 16.1 *continued*

Training/system methods	Trainer's perspective	End user's perspective
Case Study		
Examination of events or situation (often real-life) usually aimed at learning by analysing the detailed material, or posing and defining solutions for problems.	Especially useful for analysis of existing/ proposed systems. Can incorporate exercises. Simple cases may be unrealistic. Difficult to reproduce an exact duplicate of the working environment.	Opportunities exist for both exchange of views on 'what matters' and problem solving.
CD ROM		
Compact Disk Read Only Memory	Offers a mean delivery for CBT programs. Each disk offers high capacity optical data storage, which becomes a reference source equal to many books (and even more computer packages). Special hardware needed. Limited to retrieval of stored data. CD writers are now much more readily available, allowing training providers to press their own CDs.	Use of keyboard seems to help motivation for many. Use of images can offer a variety of learning techniques in the learning process. Retrieval can be in text, picture and sound form making for an interactive and varied form of learning that seems to be self-motivating.
Computer Based Training (CBT)		
Learner-managed coverage of programmed material, usually involving keyboard and screen. (Learner uses keyboard in line with screen instructions, calling forth information and responding to questions.) Moves to introduce Artificial Intelligence (AI) with the prospect of 'talking with the machine', ie , using the machine as a tutor and managing one's own learning process are not yet commercially available but may develop.	Many varied uses. Equipment may be expensive. Present levels of technology make logic-based programs most reliable. Care should be taken to ensure the material is appropriate (ie, extensive evaluation before use). Screen material can be complex and include animation. Good for presenting technical data. Compatible hardware and software needed. Tutorial help should be provided.	CBT can offer workplace simulations, and can link with videotape to provide still or moving pictures. Can offer the learner an insight to applications in practice. Addition of artificial intelligence (CBT-AI) allows 'dialogue' with learner; learner responds to computer question, computer interprets response and adjusts its own program – hence offering flexible learning process.
Computer Conferencing/Newsgroups		
These provide specialist information on specific topics.	Exchange of ideas can be carried out using this medium. Connection to the Internet is required and the same associated costs should be considered.	Newsgroup contributors tend to act as tutors and answer questions posted to the newsgroup quickly. One question posted can be responded to by many other people, providing a great variety of styles that a user can apply to specific situations.

Table 16.1 *continued*

Training/system methods	Trainer's perspective	End user's perspective
Discovery Learning		
Learning without a teacher – but usually in a controlled (ie, pre-designed) set-up, and under supervision.	Considerable design work needed. Safety paramount – may need special adjustments, and so may be unrealistic. Best suited to tasks involving dismantling, checking, adjusting, rebuilding.	Offers challenges and builds confidence as learner masters new skills. Helps understanding of principles. Time constraints do not affect learning process as with many other processes.
Discussion		
Free exchange of information, opinions, etc. A 'controlled' discussion may follow a planned path, the leader controlling the agenda: an 'open' discussion may mirror members' priorities.	May be time-consuming – especially if discussion wanders or 'process problems' emerge. Attitudes may harden rather than adjust. Especially suitable for development or adjustment of attitudes and opinions.	Individual participation may be affected by group composition. Also offers feedback to trainer on learning achievement. Promotes group cohesion.
Exercise		
Carrying out a particular task along prescribed lines. Often a test of knowledge earlier communicated.	Exercise must relate to the working environment, with attainable objectives. Some form of assessment can give an idea of how much has been learnt by the end user.	Highly active form of learning; satisfies needs for practice to apply knowledge or develop skill. Testing gives confidence.
Experiential Exercises		
Client-centred approach to individual, group and organizational learning that engages the learner using the elements of action, reflection, transfer and support.	The trainer's role is to act as a facilitator to enable the construction of knowledge, skill, attitude and value from the direct experience.	It is a learner-centred focus that draws upon personal experience as the vehicle to access knowledge, skills and attitudes and provide for planned and emergent learning.
Films and Videos		
'Visual lectures' – but often presented in dramatized form.	Useful as a precursor to discussion; can be 'stopped' at key points for discussion. Tailor-made products are expensive. Care needed to ensure material (not just title) is relevant. Most items in this category cover additional topics. Off-the-shelf products (eg, OU or other mass produced videos) are relatively cheap and are of high quality.	As 'lectures' – but addition of moving images and drama can significantly aid motivation. Possible to relate to relevant situation.

Table 16.1 *continued*

Training/system methods	Trainer's perspective	End user's perspective
Fish Bowl Exercises		
Inner circle of people doing task being observed by outer circle – hence the term 'fish bowl'. Outer circle take no part in the actual activity but merely observe and analyse inner and outer circle swap. Often used in behavioural analysis.	Particularly useful in behavioural exercises. Can be set up to allow one group to demonstrate or to allow practice to occur while others look on and learn through observation. Useful to allow trainer to focus on a small group while others observe. More effective when the inner group are unaware of what the outer group are looking for.	Allow observational skills to develop. Good to sit out for a while – can feel under pressure if in inner circle.
Instruction		
Formula-based 'teaching' session: 1. Tell – how to do 2. Show – how to do 3. Do (supervised practice) 4. Review process and results. `	For introducing skills, usually in line with a planned breakdown of small sequential practice stages. Skill may be best addressed as a whole, rather than in parts, but lengthy stages 1 and 2 yield memory problems. Typically, follows some other form of training, the skills to be learnt being those of application.	Design/balance of session important. Confidence is built by mastery and link-up of stages. Provides a vehicle for feedback to instructor. Time constraints can be eliminated with reference to the learning process.
In-tray Methods		
Often used in time management training. Can use a simulated in-tray with many tasks and the participant has to order the tasks and allocate times, explaining the reasoning behind decisions. Can also be used to simulate a bigger exercise using a set of tasks where participant has to decide priorities, make decisions, read items, decide which to delegate, interpret and carry out sets of instructions, all with interruptions and other distractions. After such exercises the results are analysed and discussed.	Requires very careful planning and thought. Appraisal can be time-consuming. Can be complex or simple, low theoretical base and very practical.	Very participant-centred. High levels of transfer.

Table 16.1 *continued*

Training/system methods	Trainer's perspective	End user's perspective
Language Laboratory		
Individual booths equipped with audio programmes and linked to a central tutor.	Allows learner-paced language tuition and practice, without 'speaking in public'. Machine management seems to promote motivation.	Good for early stages but cannot replace eventual need to practise in public. Gives confidence to individual learners as the embarrassment factor is less apparent.
Lecture		
Structured, planned talk. Usually accompanied by visual aids, eg, slides, OHPs, flipchart.	Suitable for large audiences where participation is not needed. Content and timing can be planned in detail. Structure needs to be planned carefully and should be lively or audience will lose attention. However, audience input should be considered in the form of seminars.	Lively style needed. Communication of material may be limited if no provision of feedback to lecturer.
Multimedia and Video Conferencing		
This allows contact of distributed sites where distance makes travel time and cost prohibitive.	CBT and video can be combined in multimedia programmes, which can offer both (a) information, and (b) practice in using the information to specific ends, eg, problem solving. Hardware and software can be expensive.	Allows two-way interactive communication sessions between people who are not able to meet in the same location.
Open Forum		
Panel of experts. More balanced answers are forthcoming if the questions are seen beforehand.	Allows a team of expert people to support the learning. Allows a degree of free-flow of questioning. A momentum can be built up with questions focusing on themes. Can build up a list of questions over a period of time in the training sessions to put to an invited panel.	Allows participants access to outside experts as well as trainers' and colleagues' expertise. Can deflect difficult questions away from trainers and facilitators.
Outdoor Development Programmes		
Dynamic open-air exercises, usually carried out in teams. Traditionally composed of recreation pursuits, now markets are demanding new approaches such as real community or environmental projects as opposed to planks and drums.	Offers practice in management, in challenging circumstances. Also used to develop teamwork, communication and leadership, as well as self-analysis.	Physical challenge may be deselecting if tough. Some learners may not accept relevance of physical environment. Importance of teamwork often learnt in such programmes.

Table 16.1 *continued*

Training/system methods	Trainer's perspective	End user's perspective
Project		
'Large-scale exercise', but leaving most of the process within learner discretion. Frequently involves collecting and reporting data, then offering conclusions and recommendations for improvement.	Like exercises, needs realism and attainability. If 'real life', must have support of those responsible for reality. Ideally will be 'actioned'.	Like exercises offers practice and simultaneously 'tests'. Stimulates analysis and creativity as well as reporting skills.
Prompt List		
List of 'questions to which a person should have answers'.	Can highlight interpersonal differences in terms of values – and hence stimulate debate. Can be used in conjunction with 'Exercise' category in form of assessment.	Good as a form of non-directed learning. Can give a good idea of how much the end-user has learnt when used with some form of assessment.
Radio and TV Broadcasts		
Often linked with national courses and qualifications (eg, Open University).	Large potential audiences permit costly programmes. Satellite TV is likely to offer new and wider subjects.	Viewing times often unsociable but use of video equipment can overcome this. Can be linked to tutorial assistance by phone.
Role-play		
Enactment of role(s) in protected environment. Asked to suspend self-reality and adopt other roles.	Mainly used to practise face-to-face skills (eg, selling) combined with review critiques from trainers and/or other learners.	Unless disciplined, can cause embarrassment. Degree of reality of design is an important factor for participants. Can be good for video feedback.
Role-reversal		
Enactment of reversed roles by two or more learners in simulated situation.	Mainly used to help those who operate in face-to-face situations to appreciate their contacts' needs and feelings.	As with role-play, needs discipline and realism.
Self-managed Learning/Reading		
Learner-paced coverage of printed material, with or without basic learning plan.	Knowledge retention can be good if learner motivation is high. Learning packages are often augmented by audio- and/or video-tapes.	Motivation often declines if reading is difficult/'dull'. Tutorial help can be important.

Table 16.1 *continued*

Training/system methods	Trainer's perspective	End user's perspective
Simulations		
Any large simulation exercise, that attempts to represent a high degree of reality, often also termed business or management 'games'. Games often have rules, players and are competitive.	Need to be careful about possible unexpected outcomes due to the levels of reality in the simulation. Can be good to allow a high degree of participant interdependence. High levels of planning and preparation needed. Useful as an exercise towards the end of a programme to consolidate practice of previous narrow skills thus developing complex skills. See case study on negotiating.	Allow more complex scenarios to develop that are close to real life yet allow practice and mistakes to occur in a safe environment.
Study Groups		
Task-briefed groups that also practise process review, aided by a process consultant, who does not operate outside this role.	Offer appreciation of need for both task and process management; also group learning processes.	Some learners dislike lack of structure. May generate stress.
Syndicates		
Larger tasks and exercises involving planning and preparation. Dividing the main group into smaller groups with separate rooms. Asked to discuss tasks and solve or identify a specific problem. Followed by a review.	Allow group sharing, exchange and support. Opportunity for more in-depth work than buzz groups. More opportunity for quieter members to contribute over time.	Allow group to develop its strength and identity due to larger complex project.
T-group Training		
A form of process sensitivity training. No tasks are set and the group is required to examine and discuss the ongoing process within itself.	This is not an easy option! Requires trainers to face anxiety of not knowing or offering expertise or to be the expert.	Can be frustrating but is worth working through – very rewarding.
Virtual Reality Training		
Enables creation of a simulated environment for training purposes.	Technological advances and reduced costs of processing power have allowed VR developments to become more cost-effective.	Users can learn by experience and 'explore' the environment they are trying to learn about without risk to health or safety but feel reassured that making mistakes will not be costly.

Table 16.1 *continued*

Training/system methods	Trainer's perspective	End user's perspective
Web-based Learning		
Learning via The Internet and the World Wide Web (WWW) – ever increasing as an available resource. Extensive research should be carried out to find appropriate web sites.	Both hardware and software can be expensive and connection fees should be considered along with associated running fees (monthly fee to service provider and phone bill). Care should be taken so that end-users do not use the Internet as a toy or download inappropriate information. Evaluation against learning objectives should also be carried out.	Allows users to learn at their own pace and in their own time. Exciting way to learn as the resources are extensive and tend to present information in a clear manner. However, information provided on the Internet is not always attributable and sources should be verified before use. Most web sites allow users to e-mail site provider and gain further information.

17

Multilingual and Multicultural HRD

A Ibarz

INTRODUCTION AND LEARNING OBJECTIVES

For most professionals words like 'globalization' or 'multinationalism' have ceased to be buzz words and have become inescapable realities. This is not only because motorways and Concorde have shortened travel or because capital can often ignore national boundaries, but also because technological developments have penetrated the world of work and our homes. Often when buying off the screen via satellite, cable or Internet, the place that provides the goods or the service may not be in our own country. Purchasing requests no longer have to be supplied from the country in which they were initiated. Data processing centres located in parts of the world where the costs are low can compete with more established centres. Similarly, when phoning companies like airlines, particularly out of hours, it is quite normal to hear an unusual accent at the other end of the line. In most cases it is not possible to know if the person who has satisfied our enquiry was a foreign national working in our country or if we have been transferred to a distant part of the world.

In today's market place competition comes from every corner of the globe and is forcing businesses to look at new ways of cutting costs. Successful trading nations have to go beyond simply exporting their products: they are also expected to establish their support services wherever they are engaged in economic activity. As a result of the trend towards internationalizing business and services, increasing numbers of people are working in multilingual and multicultural settings.

The literature on this subject points out that traders and business people have always been pioneers in establishing links and communicating with people from other nations. There are many historical examples of trade-sponsored initiatives leading to social and cultural change. Columbus is one such example, the main aim of his sponsors being to open cheaper trade routes to the East. What is new about the global economy, according to Seelye and Seelye-James (1995:xvii), is its scale. Everyone everywhere is affected, not just professional people. There have been large movements of people in search of opportunities for work and social improvements, within and between countries. As a result there is no need to link multiculturalism or multilingualism exclusively to international managers or to those who have access to the new technologies. They point out that: 'More than 100 languages are spoken in schools in New York City, Chicago, Los Angeles, etc.' They conclude by emphasizing the need to adapt to the new working and social environment: 'Dealing across cultures has gone from being a take-it-or-leave-it proposition to being a prerequisite for survival – your survival.'

Having read this chapter you will:

- be aware of the importance of linguistic understanding in international contexts;
- be able to operate successfully in cross-cultural situations;
- know some of the key factors in language learning;
- be able to relate some of the approaches to language learning to those of general training and development; and
- be able to use some of the key principles of cross-cultural training.

MULTILINGUAL TRAINING AND DEVELOPMENT

Monolingual and multilingual societies

The previous section contained statements that pointed to the need to acquire new skills and values as a result of relatively recent social and technical changes. However, this may be misleading, or at least before going into further considerations, the opportunity for reflection about the issues raised should not be missed. When discussing these issues, there is a danger of adopting a view of modern society which for want of a better term can be called 'Western', prevalent mainly in English-speaking developed countries, where the assumption is that monolingualism is the norm and where there is a single dominant culture and tradition.

In addition, we have often been led to believe that this situation has been stationary for many years or even centuries. But this is far from the truth. Even today there are around 5000 languages in the world and there are approximately 200 countries. It follows, therefore, that bilingualism and multilingualism, to a greater or lesser degree, are much more the norm in most countries. If this is the case, it could be argued that the ability to live and work in multilingual/multicultural communities is not as new as we think and that perhaps, in Western societies, we should consider language learning as yet another human ability that has faded as societies have become more 'civilized'. As with many abilities, such as dancing, we now have to undertake sophisticated training programmes to regain what was once natural to most human beings.

The need for foreign language training

The intention of the reflection contained in the previous paragraph is to give perspective to the issues that will be discussed below. The reality for most organizations is that in order to maximize their market effectiveness they have to operate in multilingual and multicultural contexts. There are advantages for individual employees, for the enterprise, and for the customers. Many writers in the field confirm this view. Bloch (1995:15) states, 'High-level personnel with language skills are becoming more and more necessary to corporate efficiency and success in the global environment.' Others go further. Buorgoin (in Bloch, 1995:16) argues that, 'During the next ten years a foreign language may be more helpful than a college degree, given the rapidly rising internationalization of business.' But we can again look into the past to understand the present reason why foreign languages are given such prominence in some organizations. As early as the 16th century a commonly heard statement was, 'The best language is always the customer's'. Moreover, Willy Brandt, the former German Chancellor stated, 'If I sell to you I will speak English, but if you want to sell to me *dann mussen Sie Deutsch sprechen.*'

Here is a list indicating what employers look for when recruiting graduates:

- adaptability and flexibility;
- foreign languages;
- practical experience in industry;
- the quality of the programme studied;
- IT skills;
- academic marks gained;
- having lived and worked in foreign countries;
- the university at which the degree was taken;
- having a PhD;
- qualifications gained at foreign universities.

Source: *Deutsche Bundesamt – Institut der deutschen Wirtschaft* (in Bloch, 1995:16)

It is clear from the above that the Germans are aware of the importance of foreign languages. It would be interesting to ask employers in other countries whether they would establish a similar set of priorities. Also, it would be useful to think about what most employers mean when they refer to 'foreign languages'. It is likely that they do not refer to the language studies undertaken by 'pure linguists' (students from humanities degrees) but to those undertaken by students who combine linguistic skills with marketable training like accounting, engineering, etc.

LANGUAGE IN THE COMMUNICATION AGE

We have considered the need for foreign language training, although the adjective 'foreign' that has just been used may not always be appropriate. For example, is Spanish a 'foreign' language in the USA? It may be more desirable to use the term 'modern language training' instead, but this also could be too restrictive. What we are dealing with in this chapter is how to encourage effective communication in multicultural organizations and international markets and, therefore, a wider term that incorporates more than just speech may be more appropriate.

Language training should work at several levels of complexity, and this leads some authors to indicate that they feel the term 'training' is inappropriate. 'Training implies that there is a beginning and end to the process, while learning never ends – and this is certainly true of languages' (Little, 1994:15). Language is central to very complex developmental processes and, although training can develop the abilities of the individual and satisfy the needs of an organization at a given moment, it is often an important ingredient in an individual's lifelong education.

The preferred term is simply language learning (LL), because language often incorporates non-verbal signals such as gestures, facial expression, tone of voice, social etiquette, etc. To avoid possible confusion caused by using such a generic term, in the cases where there is a need to establish a clear difference between a first language or mother tongue, and a language learnt (usually later in life) or second language, the abbreviations used will be L1 for the former and L2 for the latter.

The next few paragraphs offer further considerations on the place of language within the larger context of communication. The aim is to encourage thought about an aspect of our lives which, as Crystal (1997:2) says, 'belongs to everyone'. We all communicate using at least one language and we can all claim that we have some experience of LL. In practice, however, we are more or less competent communicators without giving much thought to the processes involved.

The media often remind us that we live in the 'communication age'. Communication is a term that can be interpreted in different ways and is often used to establish clearly the context in which an account or an argument is to unfold. Fiske (1990:1) describes the challenge presented to anyone attempting a definition: 'Communication is talking to one another, it is television, it is spreading information, it is our hair style, it is literary criticism: the list is endless.' Fortunately, he soon reaches a definition that is adequate for the purposes of this chapter: communication is 'social interaction through messages'.

Factors that influence effective communication

Figure 17.1 shows the multiplicity of factors influencing the process of communication. The upper part of the figure depicts the communicator deciding on a particular message, encoding this in a particular language and then emitting this as speech, written communication or body language. This is then received, decoded and interpreted by the receiver. A message from the communicator to the receiver is one-way communication (radio or television broadcasts, letters, e-mail, railway station announcements, etc). When a response is made, ie, the feedback loop, this then becomes two-way communication (discussions, negotiations, etc.). Two-way communication is generally more effective and more likely to ensure that both parties agree about the meaning of the interaction.

Figure 17.2 highlights the additional factors that play an important part in communication between speakers who do not share their first language. The assumption in this case is that they are both communicating in the same language and one of them is an L1 speaker and the other an L2 speaker. If the dialogue is flowing all these elements are combined in a process of message encoding and decoding that takes place at considerable speed. One or both speakers may have to resort to a range of strategies that may include gestures, pointing, drawing, the use of a third language, etc.

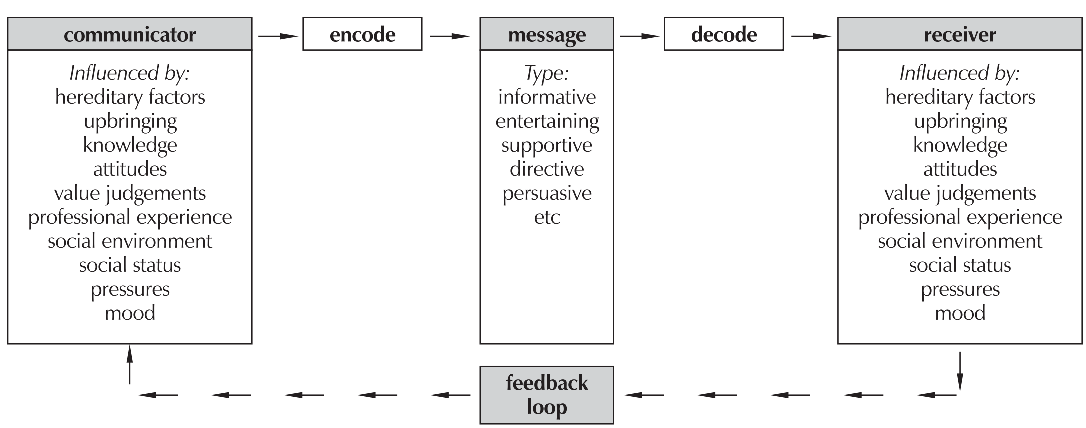

Figure 17.1 The communication process

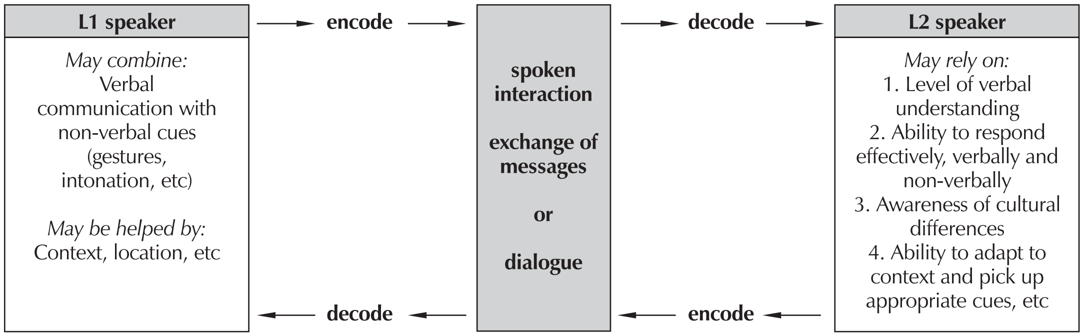

Figure 17.2 Factors that contribute to effective interaction between L1 and L2 speakers

LANGUAGE TRAINING IN HRD

It is clear that language learning is a complex but potentially rewarding experience and that it is a way of gaining access to other cultures. This last point should not be overlooked: the language learner develops cross-cultural empathy which may be put to good use in any multicultural environment and not just in relation to the one language studied. There are, as has already been indicated, clear benefits for the individual and there are also benefits for organizations. In this section the aim will be to focus very much on practical aspects of LL and on the potential impact it may have on the individual in terms of personal development.

Very recently I received a brochure from a very well established recruitment consultancy agency which specializes in accountancy and from which I have taken the following paragraph:

> Thus we are seeing the rise of the multinational accountant, the UK-version of which, it seems, is let down only by his or her lack of second or third language skills. It's proving to be a big handicap in some cases, and while language studies require a rather different learning approach compared to technical accounting, it is worth persevering if full advantage is to be taken of the best international career moves. Simply believing that 'English is the business language of the world' could severely limit your options.

This text is very appropriate to provoke thought around the more practical issues involved in LL. First of all, it comes from the 'real world'; it is not published for an academic audience. Secondly, it goes to the point by highlighting the potential 'handicap' of being a native English speaker. Thirdly, it reinforces some of the points made earlier in relation to the nature of language learning: 'language studies require a rather different learning approach'.

How long does it take to learn a language?

Because there are many misconceptions of how long it takes to learn a language to an advanced level, it may be useful to consider the case below of Mike who was successfully trained to speak German. He is only one example; each success story differs and it would be wrong to assume that his is the only way.

A SUCCESSFUL LANGUAGE LEARNING EXPERIENCE

Mike describes his intensive course:

> I learnt German in the USA, at the Defense Language Institute. The course was 46 weeks. I believe other courses such as Russian and Mandarin were longer than a year. Our class of 13 had two primary instructors (one Austrian and one American). Classes ran approximately six hours per day (8:30–3:30, one hour for lunch), five days a week. We had roughly one to two hours of homework per night, but some studied much less and some much more. We had classes with other instructors each day, usually for two or three class periods. The overwhelming majority – at least 90 per cent – of the faculty were native German speakers and were fluent in both German and English.
>
> The first few weeks were spent learning phrases (listening and speaking) and developing an ear and tongue for the language. After the first few weeks, we began studying the grammar and vocabulary structures of the language for one or two periods per day. We had a language lab once per day in which we listened to radio broadcasts, news broadcasts, and radio serial programmes. We also studied the culture a significant amount. We occasionally watched newscasts, movies and television programmes. Near the end of the programme we began writing and delivering short speeches about controversial topics and then discussed them in class, and we were not able to speak in English.
>
> We were required to speak only German during some class periods (even in the beginning), but in others, such as grammar lessons we could speak English if needed.

(I had been asking Mike questions via e-mail. My last question was about the impact of the course on his personal and professional life.)

> As for your last question, I don't use my language skills very often in my work, though I have used both German and Spanish on a few legal matters I worked on. I think of it more as a personal achievement, and I use my languages more conversationally with friends than anything else. I do believe that studying foreign languages has increased my overall language and communication skills.

I should mention that I have been contacted on several occasions by headhunters trying to fill legal positions in Germany and Austria based on my language skills, so I suppose that it has provided opportunities that otherwise would not have been available.

Cheers,
Mike

ENGLISH AS THE LINGUA FRANCA

From the point of view of LL, a division between the English-speaking countries and the rest may help to throw further light on some of the issues hinted at above, when the word 'handicap' was used. A more extreme version of this view appeared on a sticker distributed by an association of language teachers: 'Monolingualism is a curable disease.' Because English is fast becoming the lingua franca of the modern world, above all in such influential sectors as the new technologies, business, tourism and entertainment; and because geographically many English speakers are isolated from contact with other languages, those who are brought up and live in English-speaking countries tend to be less motivated to learn another language.

By contrast, speakers of most other languages are often, from an early age, encouraged to learn a second and third language for political, commercial or cultural reasons. The strong term 'disease' would be justified not just by the loss of professional opportunities at an individual level and the negative impact on exports and international relations, but also by the loss in terms of personal development (as Mike indicates in his answer to my last question) caused by the lack of exposure to a new mental discipline in terms of transferable skills, and to the missed opportunity of becoming more 'multiculturally' aware by having been in contact with at least one alternative culture in the course of the foreign language learning experience.

The global dominance of English encourages many speakers of other languages to gain at least a working use of the language in many fields. Browsing through sites on the use of the Internet in education, I came across a paper in which a Spanish schoolteacher from a poor district of Madrid reported that his students in a geology class had become avid followers of NASA sites developed for schools in the USA. 'They are in English, of course, but the youngsters have come to terms with the fact that English is the lingua franca, and they use it with more familiarity than their teachers, which is an added advantage from a pedagogical point of view.'

We see therefore that the division between English speakers and the rest is useful in order to highlight the fact that motivation and the sociocultural context in which a learner engages in a process of LL are fundamental considerations. There is, however, another reason for spending time making this distinction. The result of this linguistic imbalance is that the teaching of English is a large industry with a very wide range of up-to-date teaching materials, while the learners of many other languages have to make do with very limited, outdated resources. In addition, most language teaching methods, methodologies and theories have been led by research based on learners of EFL (English as a foreign language) and then applied to or incorporated into the teaching of other languages.

THEORIES OF LANGUAGE LEARNING

The framework on which current thinking on L2 training is based requires a few theoretical considerations. In this section we consider issues related to language itself and to the fascinating and unique capacity for language learning that human beings have. Most of us find the way a child learns a language a total mystery, and the excitement that the parents express at every step of a child's linguistic development is witness to this amazing feat. There are several theories about how children learn their mother tongue. Below four of the main ones are very briefly explained:

1. *Imitation or behaviourist:* Children learn simply by imitation and habit formation. They receive positive reinforcement and continue to imitate and practise until they form habits of correct language use.
2. *Cognitive:* Based on Piaget's (1950) theories, language develops as concepts are formed. Linguistic structure will emerge only when there is an established cognitive foundation. For example, before children can use structures of comparison they need to have developed the conceptual ability to make judgements of size.
3. *Innatist:* Chomsky (1959) claimed that children are biologically programmed for language learning and that language develops in the same way as other biological functions.
4. *Interactionist:* A child makes linguistic progress according to biological ability and linguistic environment. The type of language used by adults, and their ability to adapt and simplify it to give the child a maximum opportunity to interact and learn, play a crucial part.

Most authors agree that it is possible to see several of the above theories and others as complementary, and useful to explain different aspects of a child's linguistic development, rather than seeing them as opposed and contradictory. Crystal (1997:237) in his informative *Cambridge Encyclopedia of Language* reflects such a view: 'Doubtless imitative skills, a general language-learning mechanism, cognitive awareness, and structured input all play their part in guiding the course of language acquisition.' Research in these areas is difficult and far from conclusive. Not surprisingly, theories of foreign or second language acquisition resonate with similar statements, although it is important not to carry any parallels too far, above all in the case of adult learners. The key differences for adults learning an L2 are as follows:

On the one hand adults:

- already have a language and this reduces their motivation to learn another;
- already have a language which 'interferes' with the learning of an L2;
- are more self-conscious of errors in pronunciation and grammar;
- are less able to assimilate cultural differences;
- are in most cases much less exposed to the L2 than a child to its mother tongue;
- usually learn or study in a context which is not authentic (the need to speak the L2 in a classroom situation is usually contrived);
- may choose to remain silent during a lesson.

On the other, adults:

- already have a language which may 'help' with the learning of an L2;
- can read and write;
- often have sophisticated learning strategies that can simplify the learning of some aspects of the L2;
- can respond more effectively to feedback.

These key differences have an important impact on the theories detailed above. Close parallels exist between language learning and learning in general (see Chapters 10 and 11); and research into language learning has informed our understanding of how we learn (see Pinker, 1995). Therefore when consideration is given to the main theories in L2 learning, we find that they are basically the same theories but that they have undergone important modifications:

1. *Behaviourist:* Learning by habit formation, the same as in the acquisition of L1 (mother tongue or first language). The difference here is that the learner confronts the learning of L2 with the habits learnt in L1, which, depending on the languages involved, may be a greater or lesser obstacle.
2. *Cognitive:* Learners use their already developed cognitive abilities in a creative way to produce hypotheses about the structure of L2. They construct rules, put them into practice, and alter them if they do not produce the expected result. At each stage learners have developed a language system to cope with communicating in the foreign language, which Selinker (1972) called an 'interlanguage', an ever evolving and dynamic system which shares elements of the L1 and L2.

3. *Innatist or 'the monitor model':* Similar to some of Chomsky's ideas on L1 learning and proposed by Krashen (1982). L2 follows a pre-set sequence of learning stages. The learner makes progress by taking part in communicative acts during which he or she is guided mainly by intuition much as a child would be. The process is 'monitored' by the formal learning of rules and information about the workings of the language. This is an influential theory in the development of the so-called communicative methods.
4. *Interactionist:* An adult makes linguistic progress when exposed to comprehensible input. The type of language used by teachers and interlocutors, and their ability to adapt and simplify it to give the learner a maximum opportunity to interact and learn, play a crucial part.

Theories are important because they are the foundation of the many methods that exist for language learning and because they help trainers and learners to make informed choices and take control of their training or learning programmes.

TEACHING AND TRAINING METHODS

The many different methods in existence are based on a particular view of language learning and usually recommend the use of a particular set of techniques and teaching materials. They all have advantages and disadvantages and some are better at achieving certain outcomes than others. Some authors claim that they all work provided motivation, perseverance and adequate support are present. These days most good courses tend to be flexible in their approach and are eclectic, instead of adhering to only one method. They will adopt the method appropriate to the needs of the learner and the circumstances in which the learning is taking place. The objectives of the course and often the individual objectives of the learner play a determining part in deciding on methods at each stage of the learning curve. The tendency is towards the tutor as adviser or facilitator and towards learner-centredness. Some of the most influential methods are described below.

The academic or grammar translation method

This is based on detailed analysis of the written language and includes translation exercises, the learning of grammar and the memorization of vocabulary as the main activities. After being the main method for many decades, if not centuries, it was almost universally rejected (outside literature-based university courses) in the 1960s and 1970s. However, in the last few years, some teachers have argued that some aspects of translation can play a part in reinforcing other skills.

The audiolingual method

The emphasis is on teaching the spoken language through dialogues and drills. A typical lesson starts with a controlled dialogue that introduces only a few new vocabulary items and includes examples of one or two new structures. The students listen to an audio-tape or CD, and repeat the sentences. They then do some drills connected with the dialogue. Finally they are allowed to incorporate the vocabulary and structures into more open activities. The homework is usually to go to the language laboratory to practise more dialogues and drills. Language is divided into the four skills of listening, speaking, reading and writing, which have to be taught in that order. This method in its pure form is hardly ever found in today's classroom but was once very influential. Above all we find that its emphasis on the spoken language, the division into four skills (listening, speaking, reading and writing), and the step-by-step approach are still in widespread use.

The direct method

This shares elements with the previous one. The aim is to involve the learner in speaking and listening to the L2 in realistic everyday situations. No use is made of the L1. Tutors often use drama techniques and simplified language in their presentations, and follow them by questions which the students have to answer in the L2. Learners are encouraged to think in the target language. The language is introduced via listening and learners often spend weeks without seeing the written form of the language. Formal grammatical rules are avoided. Pair and group work are often introduced. This is a very influential method, with many variations, and has been used especially in EFL teaching.

Communicative teaching

Also linked to the previous one but influenced by the theory of interlanguage. Learners are encouraged to communicate in their transitional language. The important thing is to get the message across regardless of accuracy. The tutor becomes a facilitator in creating situations in which the learners exchange messages. The main activities are information gap situations and guided role-plays. The courses are organized in terms of the meaning ('notions') required in order to communicate in particular functional contexts.

The last three methods share the criticism that they neglect the teaching of grammar and deprive students of the principles and rules that will allow them to generate new language, which is as error-free as can be expected from an L2 speaker. And in spite of the claims made to support the success of such methods, they are not universally accepted. Some see the success of classroom-based language teaching as limited and contrast it with the relative ease with which people in contact with a language in a real situation come to terms with the new language. They search for methods that can get closer to the natural experience of language learning and for ways of making learners more aware of their potential and their limitations, and more responsible for their own learning.

Some of the alternative approaches proposed represent very radical departures from the established methods. They tend to place more emphasis on individual than group learning, and several of them are often referred to as the 'humanistic approaches':

- *Suggestopedia* – based on the unused potential of the brain that can be released by reaching a state of total relaxation while being exposed to hearing the foreign language.
- *The Silent Way* - a method that avoids, as much as possible, tutor participation. A few very simple elements are introduced, usually with colours and pictures, and learners make up their own sentences whenever they want. The L1 is not used and the tutor remains as 'silent' as possible.
- *Community Language Learning* – uses the methods of counselling therapy. The tutor/counsellor develops strong personal links with the learners who speak in their L1 and are given L2 translations by the tutor. The learner then repeats what the tutor has said. The aim is not so much to learn the language as to allow the learner to come to terms with their emotions through the use of the L2. What is interesting about this method is that it is based on the type of messages, which are at the opposite end of the spectrum of the messages usually exchanged in most L2 classrooms, where the great majority are of no real interest to the person voicing them. This is often seen as reducing personal involvement and contributing to low motivation.

These three examples underscore the constant search for ways of improving the process of L2 acquisition and reinforce the point that there is a wide choice of methods. It should also follow that companies entering the field need to seek professional advice if they want to avoid making expensive mistakes and wasting precious resources.

As a form of summary of this section some of the buzz words and expressions are listed below. They may appear in most publicity and information related to good, up-to-date, LL courses. They are:

- teaching *in* rather than *about* the target language;
- interactive use of the language;
- focus mainly on listening and speaking during contact sessions;
- emphasis on *use* of the language as much as possible for real communication;
- manageable tasks;
- pair and group work;
- use of role-plays and simulations.

THE MANAGEMENT OF LANGUAGE TRAINING

Being aware of the complexities involved in the strong relationship between cross-cultural awareness and foreign language skills and some degree of familiarity with the theories of language acquisition are only a first step in the direction of creating or recognizing a high quality programme in L2 training. It is, however, an important first step that should give some understanding of the issues involved.

One of the characteristics of any effective HRD strategy is having realistic aims. Because of the many existing misunderstandings that surround L2 training, professionals in the field often tell anecdotes about companies that approach them with formidable requests such as: 'Our sales manager (with no previous experience of L2 learning) has to chair a meeting in Italy in four weeks time, it is very important that she conducts the meeting in Italian …'; 'We are going to visit our partners in Russia in the summer and would like to be able to communicate in Russian, unfortunately we are very busy at present and can only spare one hour a week …'. Once the realistic aims have been established, a key factor is a systematic approach to the management of the programme.

Britain is a good test bed for study of LL programme management. On the one hand, it is a country with a long tradition in the fields of both training and management. On the other, as indicated earlier, it has a very poor record in the learning of modern languages, with a population that lacks experience and motivation in this area. Many of its European counterparts give such programmes a very high priority and invest very large sums in them. By contrast a large number of British companies involved in export do not even have a LL strategy and simply respond to situations on an ad hoc basis. An additional challenge is that while most other countries focus mainly on the teaching of English, British companies have to train their staff in a variety of different languages. The final irony is that because of the high marketability of its own language, many of the positive developments and examples of good practice that have taken place in the field of LL in the last few decades have happened in the UK. One such example is reported by David Jackson of Knoll Pharmaceuticals (formerly Boots Pharmaceuticals) in an article entitled 'A winning strategy' (Jackson, 1995).

KNOLL PHARMACEUTICALS

The scheme is part of an integrated human resource strategy to develop a truly international culture within the business, and is linked to another major initiative which has delivered global competences weighted by function, role and national culture, and cross-cultural awareness training.

This LL programme in French, Spanish, German and Italian was developed in partnership with Nottingham Clarendon College Languages Department and is run on site by native speakers from the college's tutorial staff. The driving philosophy behind the scheme is the maximization of shareholder value. This is achieved by ensuring that the assessment is measured against the requirements of the job, focusing on adding value. Particular benefits have been reported in:

- dealing with international phone calls;
- participation in international meetings;
- discussions with suppliers and customers;
- time saved in translation of documents.

One of the strengths of the programme is its flexibility. The scheme consists of a series of 12-week sessions of two hours per week held in the workplace at times designated to minimize disruption of work. There are nine stages that span the range from survival to near native. The scheme has been so successful that a training site has been developed which includes four dedicated LL rooms equipped with audio, video and satellite TV, and the introduction of Superhighway technology is being considered. This considerable investment was justified by the saving in administration costs that have accrued since the centre was established.

Not all companies, particularly small or medium-sized ones, could match such a model. It is interesting to note that Jackson's company chose to go into partnership with an experienced institution rather than going it alone and risk a period of trial and error. Jones (1993:91) suggests a list of questions that should be of assistance to businesses when looking for such a partner:

- What experience do you have of company LL?
- What methods of teaching do you use?
- What kind of teaching materials would you use?
- What are the qualifications of your tutorial staff?
- How long should my staff take to reach each of the agreed levels?

- Have you any clients similar to us who can recommend you?
- What extra costs are there on top of the tuition fees (for materials and equipment)?

A final and very important question is, how will the results be measured? This can be done by progress and diagnostic tests but often a better alternative are external assessments such as the ones provided by the Institute of Linguists and the London Chamber of Commerce and Industry. In the British context, a government initiative based on the use of competences as the basis for a framework in National Vocational Qualifications and led by the Languages Lead Body also has a major contribution to make in this area. Similar bodies exist in other countries.

A systematic approach

The brochure from the recruitment consultants referred to earlier, hinted that the approach to language learning is different to the learning approaches most business people are used to: 'Language studies require a rather different learning approach compared to technical accounting.' Progress is non-linear and a multiplicity of skills are involved in most activities at even at the most basic levels. This is perhaps more reason why it is important to give an external structure to the learning process based on a systematic approach. Smith and Arkless (1993) give guidelines for good practice based on the recommendations of the Association of Language Excellence Centres, a professional body for public and private sector providers of LL and related services for business. They begin by emphasizing the importance of offering quality in all areas, including marketing and customer service and above all in programme management and product knowledge, in this case language teaching expertise.

A systematic approach would follow several stages:

1. An *enquiry form* as the basis for recording information which may be useful when formulating a training proposal.
2. A *language needs analysis* for each individual to be trained as part of a corporate programme, including job description, previous LL experience, company/personal aims. A large organization may require a language audit to determine the existing foreign language capability. Diagnostic tests are often used.
3. A *training proposal* based on the previous stage. It contains a summary of the course that has been designed for this particular company. It includes information such as the groups in which individuals will be placed, aims and objectives, materials, timing, location, evaluation procedures and cost.
4. A *trainer briefing.* Tutor or trainer effectiveness, together with learner motivation, is considered to be the most influential factor in the level of success of a LL programme.

Unlike other kinds of training, LL is heavily dependent on the competence and even personality of the tutor who is often the only model that the learner can aim to imitate. They need to be fully briefed on the training model proposed.

5. *Evaluation.* Progress should be under regular review. The process is usually informal, often supported by tests and even examinations as has been indicated above. The process of formative feedback is often fundamental. At the end of the programme, individual and group reports should be presented. Trainees should also be consulted about their views.
6. *Trainer development.* Trainers should also benefit from the evaluation process and be offered appropriate professional development.
7. Ongoing *quality control* permeates all the stages that make up the process.

THE GOOD LANGUAGE LEARNER

Can anyone be trained? This is a good question, and since we all manage to learn an L1, it is theoretically possible. In practice, however, there are studies that suggest that there are cases where the resources that would need to be allocated may not justify the exercise. One such study based on middle managers by Koch (1996:25) suggests that previous academic excellence or business acumen are not the best predictors of performance in L2. One of the measurements he suggests is based on the psychological predisposition of the learner towards other cultures: 'It has been empirically suggested that such personality traits as empathy, open-mindedness, flexibility and tolerance are associated with cross-cultural success.' This would confirm some of the points made at the beginning of this chapter. However, it is worth noting that such characteristics would also be very valuable in coping with the 'humbling experience' that is involved in learning an L2, particularly at the early stages, when the trainee is corrected and/or 'exposed' in front of others (often members of staff with less seniority), deprived of the linguistic shield that the use of one's own language offers in everyday encounters.

Lightbown and Spada (1993:34) use a series of statements to define some of the characteristics involved. They should provide ample food for thought to anyone interested in this aspect of the process. A good L2 learner:

- is a willing and accurate guesser;
- tries to get the message across even if specific language knowledge is lacking;
- is willing to make mistakes;
- constantly looks for patterns in the language.

Factors such as risk taking, focusing on the message rather than the language, adaptability, lack of inhibitions and ability to detect patterns significantly influence the degree of success.

Crystal (1997:375) questions if there is a genuine aptitude for L2 training. With sufficient motivation, intelligence and opportunity, anyone should be able to succeed. He also adds another important dimension to the search for key defining characteristics: 'Of particular importance is an ability to detect phonetic differences (eg, of stress, melody, vowel quality) – something which can manifest itself in other domains, such as drama or music.'

Ideally each of us should have all these characteristics, and others like memory and even being eternally young. However, as in so many other areas of learning and training, the emphasis should not be so much on aptitude as on the ability to resort to learning strategies which good training and development should encourage and develop. They are closely linked to learner styles and to the need to tailor courses to the specific needs of individuals and of group as a whole.

THE NEW TECHNOLOGIES

This chapter began with references to the impact of the new technologies on our daily and professional life, and if we are to believe the hype it will be a lifelong learner's paradise. If there is an area in which the promises may become a reality, it is likely to be in LL. There are already many useful and well-established developments, for example satellite television. Computers are also making a major contribution, although the existing systems are still mainly text-based, which is not the main domain in which most L2 acquisition concentrates. Pictures, and above all the imminent widespread use of sound, will bring about major changes in the area of modern language teaching methods.

The opportunities for exposure to the language of our choice will multiply. We may have many opportunities to communicate in the L2 and will be able to gain easy access to current resources and information on-line. That languages is one of the areas which will make the greatest gains is not surprising. The Internet and the WWW are about communicating information, and about communications that are the kinds of fertile ground on which LL should thrive.

There are already many opportunities offered in the area of computer-based learning. Although claims still have to be supported by adequate research, much is happening and both tutors and learners often report their latest discoveries with excitement. As has just been stated, text-based resources are widely available. For example, newspapers from most countries and in many languages are usually easy to access, as is information about many organizations, institutions and events that are very useful in developing the cross-cultural dimension, an area which classroom teaching often found difficult to come to terms with. There are also many interesting and informative sites that are developed with the language learner in mind. Some of the Web sites for trainers/learners of English are:

http://www.catesol.org/
http://www.hi-net.or.jp/ hiyukita/
http://www.ilcgroup.com/home.html
http://www.planetenglish.com/
http://www.pacificnet.net/ sperling/eslcafe.html

Those interested in other languages may want to visit the following sites as examples:

http://www.hull.ac.uk/cti/langsite.htm
http://www.ncl.ac.uk/ nsml/links/contents.htm
http://www.ncl.ac.uk/ njw5/
http://bubl.ac.uk/link/subjects
http://www.travlang.com/

Overwhelming complexity is one of the characteristics of the Internet. From the point of view of LL there are some important pedagogical implications. First of all, what will be the future role of the trainer? Assistance will have to be offered so that time wasting and confusion do not overwhelm the learner. It is likely that training of trainers will become a major priority. There are also conceptual implications that have not yet been properly discussed. To what extent is the experience of surfing the Net (when looking at sites in a foreign language), with its emphasis on decision making and constant evaluation of materials akin to, for example, a visit to a foreign city? Are the new technologies not just complementing what was already there and/or offering greater opportunity for practice, but also offering opportunities for developing new skills? Will the changes go beyond how we learn into what we learn?

E-mail is already being used for collaborative learning in modern languages. Tandem learning (students linked individually and in groups to speakers of the L2) is having a major influence in a few institutions (http://www.slf.ruhr-uni-bochum.de/or http://tandem.uni-trier.de/). The role of CALL (computer assisted language learning) is already well established and there are many useful CD-ROMs. One of their strengths is that they are excellent at giving attention to sound, which is often one of the main challenges in L2 acquisition. Often melody or intonation and not so much pronunciation is the main obstacle in trying to get a message across.

All these developments may be seen as fragmented and complementary and all have their place in an eclectic approach. There are also already in existence projects that try to bring together all these experiences and use sound extensively. They call themselves 'virtual language centres'. One example is the Merlin Project (http://www.hull.ac.uk/merlin/merlin/html).

MULTICULTURAL/CROSS-CULTURAL LEARNING

We can see, therefore, that while language contributes to the formation of meaning it is rarely the complete message. There are other factors, most of which can loosely be termed 'cultural', which include gestures, tone of voice to indicate emotion, social conventions, religious beliefs, etc. We refer to the problems experienced by travellers and international professionals as culture shock, not as language shock, although as we will see the two are related. Hofstede (1994:209) describes the experience:

> As illustrated over and over again in the earlier chapters, our mental software contains basic values. These have been acquired early in our lives, and they become so natural as to be unconscious. Based upon them are our conscious and more superficial manifestations of culture: rituals, heroes, and symbols. The inexperienced foreigner can make an effort to learn some of the symbols and rituals of the new environment (words to use, how to greet, when to bring presents) but it is unlikely that he or she can recognise, let alone feel the underlying values. In a way, the visitor in a foreign culture returns to the mental state of an infant, in which he or she has to learn the simplest things over again. This usually leads to feelings of distress, of helplessness, and hostility towards the new environment.

Perhaps he is overstating his case, but the points made are valid. This passage is trying to warn companies against the danger of having to terminate a placement abroad prematurely by being ignorant of the impact of the experience on the person involved. Hofstede also highlights the need for LL which incorporates cultural awareness, and not simply when travelling abroad, but when welcoming foreign visitors or when working and collaborating with ethnic minority people, businesses and organizations.

Harris and Moran (1989:271) state that employee development programmes would appear to have common objectives:

1. To encourage greater sensitivity and more astute observations of situations and people who are culturally different.
2. To foster greater understanding in dealing with representatives of micro-cultures within one's own country.
3. To improve customer and employee relations by creating awareness of cultural differences and their influence on behaviour.
4. To develop more cosmopolitan organizational representatives who not only understand the concepts of culture, but also can apply this knowledge to interpersonal relations and organizational culture.
5. To increase managerial effectiveness in international operations, especially with regard to cross-cultural control systems, negotiations, decision making, customer relations, and other vital administrative processes.

6. To improve cross-cultural skills of employees on overseas' assignment, or representatives of micro-cultures in our own country.
7. To reduce culture shock when on foreign deployment, and to enhance the intercultural experience of employees.
8. To apply the behavioural sciences to international business and management.
9. To increase job effectiveness through training in human behaviour, particularly in the area of managing cultural differences.
10. To improve employee skills as professional intercultural communicators.

More specific objectives can be seen in the Canadian International Development Agency (CIDA) cross-cultural training programme's focus on achieving seven skills:

1. Communicate respect.
2. Be non-judgmental.
3. Personalize knowledge and perceptions.
4. Display empathy.
5. Practise role flexibility.
6. Demonstrate reciprocal concern.
7. Tolerate ambiguity.

In the USA, Peace Corps training has the following objectives:

- Prepare the volunteer to accept and be tolerant of values, beliefs, attitudes, standards, behaviors, and a style of life that might be quite different from one's own.
- Provide the skills to communicate this acceptance to another person.
- Provide the sensitivity and understanding necessary to effectively interact with a person from another culture.
- Teach appropriate behaviour responses in situations where characteristics of the other culture prevail.
- Prepare the volunteer to understand, anticipate, and cope effectively with the possible reactions to him or her as a stranger or as a stereotype of his or her own culture.
- Provide an understanding of one's own culture and the problems cultural bias might create.
- Provide the adaptive skills to cope with one's own emotional reactions in the new and strange situation and to satisfy one's own culturally-conditioned behaviour.
- Provide the skills needed for continued learning and adjustment in the other culture.
- Help develop an orientation toward the sojourn in the other culture as a potentially interesting, enjoyable, and broadening experience. (Harris and Moran, 1989:287)

CONCLUSION

The emphasis throughout this chapter has been on raising awareness of the implications for training and development within multilingual and multicultural areas. The aim has been to dispel misconceptions and to encourage consideration of the key theoretical and practical issues involved. The intention is to encourage greater participation by ensuring success based on realistic expectations of language and cross-cultural programmes. With this in mind, some of the main points are reiterated below:

- the link between language and communication;
- the interdependence of language and culture;
- the important role of geography and L1 in determining attitude towards L2 and opportunities for bilingualism and even multilingualism;
- the ways in which people have tried to make sense of language acquisition and the theories they have formulated;
- the ways in which the theories have been translated into practice in the form of teaching and training methods;
- the importance of a systematic approach to managing a programme;
- the role played by the individual and the personal characteristics that may contribute to effective training;
- the changing world of training and the opportunities offered by digital technologies.

Hopefully several of the issues raised will provide food for thought for those involved in training and development. A few questions may help to stimulate the process:

- What could the role of LL and cross-cultural training be within an overall HRD strategy?
- How could an organization you are familiar with implement an LL or cross-cultural development strategy?
- What is your own experience of LL and cross-cultural training? What were the strengths and limitations?
- Which language would be of greatest use to you?
- How would you go about learning that language to a proficient level?
- What do you think would be the strengths and limitations of LL courses advertised in the press as self-study courses?
- What would be the advantages and disadvantages of a total-immersion language course?

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18

Management Training and Development: Problems, Paradoxes and Perspectives

Dominic Irvine and Colin Beard

INTRODUCTION AND LEARNING OBJECTIVES

> The UK has about 2.75 million people who exercise managerial roles. About 1.1 million are in middle and senior management positions. About 90,000 people enter management roles each year. The great majority of these have no prior formal management education and training. (Constable and McCormick, 1987: Executive summary)

Constable and McCormick (1987) and Handy (1987) in their seminal reports both identified the need for formal, coherent training and development programmes for managers in response to the shortcomings of British management education in the context of international competition. In 1997, the UK Institute of Personnel and Development published its first guide on international management development (IPD, 1997). This reflects the increasing use of strategic alliances (Gugler, 1992; Nohria and Garcia-Pont, 1991) and cross-border trade (Daniels and Radebaugh, 1995; Segal-Horn, 1994) as a consequence of globalization (Harris and Moran, 1996; Julien,1996). In the UK, there is an ever-growing assortment of training and development opportunities for managers. These range from MBAs to outdoor management development programmes in remote parts of the countryside. All purport to develop the manager, resulting in them being better suited to the challenges of the future.

In this chapter, we explore various problems, paradoxes and perspectives of management development. The aim of the chapter is to examine the fundamental issues that affect management training and development (MTD). Reference is made to literature dealing with specific tools and techniques of MTD. We start by examining the nature of management. Then we investigate briefly the nature of development. Third, we explore the differing perceptions as to the purpose of management development. We then list the many and varied techniques of MTD. Fifth, we examine the difficulties of determining the effectiveness of MTD. Finally we conclude with a review of issues that ought to be taken into account when approaching the task of training and developing managers.

Having read this chapter you will:

- understand the difficulty in accurately defining 'management';
- know the main roles of a manager;
- know the essential principles of continuing professional development; and
- be able to evaluate management training and development.

WHAT DO WE MEAN BY MANAGEMENT?

According to Drucker (1974:45) 'Effectiveness is the foundation of success – efficiency is concerned with doing things right. Effectiveness is doing the right things.' To measure, as Drucker (1974) suggests, the effectiveness of a given MTD programme it is necessary first to establish what is the desired outcome. Without this, measuring success is somewhat imprecise. To paraphrase Levitt (1991), 'unless you know where you are going, any road will take you there'. A clear idea of management enables those individuals involved in MTD to:

- assess the management development requirements of an individual;
- evaluate management development courses;
- measure the success of such management development programmes.

Herein lies the fundamental difficulty in MTD: 'What do we mean by management?' A 'lack of understanding of the concepts, principles and techniques of management makes it difficult … to train managers' (Koontz *et al,* 1984:11). Defining management is not as simple as it might appear. Many authors have attempted definitions of management (eg, Killen, 1977; Stoner and Wankel, 1986; Torrington *et al,* 1989) to name a few, with varying degrees of success. In contrast some authors (eg, Drucker, 1974) argue that management cannot be defined and suggest that a description of management is all that is possible. To illustrate the difficulties this creates for MTD, some examples of definitions and descriptions are considered next. The examples cited are but a few of the many that abound. For a review of the distinction between training, education and development, see Chapter 1.

Definitions of management

A specific feature must be exclusive to an activity in order to define it according to Geach (1956). Handy (1985:361) suggests that trying to work out what are the defining elements of management is extremely difficult:

> It has never been easy to define what a manager is, or what he (sic) does. It is a useful concept, 'management', the missing 'X', the exact qualities that are important, this tends to shift from equation to equation. Definitions of the manager, or the manager's role, tend therefore to be so broad that they are meaningless, or so stereotyped that they become part of the background. 'Yes, of course', we say and take no further notice.

To illustrate the breadth of definitions in use consider that offered by Torrington *et al* (1989:4):

> management is not just a job done by people called 'managers'; it is an aspect of the job done by all those who have to cope with the problems and opportunities of organization: social workers, editors, ward sisters, chefs, housewives, and engineers, school teachers, and clergyman, the administrators, and many more.

Definitions such as this are almost suggesting that 'to live is to manage'. This may be the case: everybody has to manage to a greater or lesser extent whether it be pocket money, or a multi-billion pound business. However, a definition this broad is of little value to MTD as it validates almost any form of training on the grounds that it will involve management to varying degrees.

A commonly adopted solution that avoids the need to embrace the thorny issue of defining management is to describe the management process instead. By 'management process' what is meant is 'what managers do' (eg, Koontz *et al,* 1984; Tarr, 1973). Indeed, Drucker (1974:37) argues that a description of management is all that is possible:

> Management ... cannot be defined or understood – let alone practised – except in terms of its performance dimensions and of the demands of performance on it. The tasks of management are the reason for its existence, the determinants of its work, and the grounds of its authority and legitimacy.

This initially seems sensible reasoning. However, it can be applied to any activity. For example: '*Music* ... cannot be defined or understood – let alone practised – except in terms of its performance dimensions …'. A *musician* is unable to make music without an instrument just as a manager without a situation to manage is unable to manage. The problem has shifted from defining the nature of management to defining what constitutes a management task, but the uncertainty remains.

Mintzberg (1973) is one of the few writers in this area to have attempted a systematic evaluation of what constitutes management. Mintzberg proposed 10 interrelated working roles performed by all managers. These are divided into three interpersonal roles, three informational roles and four decisional roles:

Interpersonal Roles:

- figurehead;
- leader;
- liaison.

Informational Roles:

- monitor;
- disseminator;
- spokesman.

Decisional Roles:

- entrepreneur;
- disturbance handler;
- resource allocator;
- negotiator.

Like Mintzberg, Stoner and Wankel (1986) described the roles of a manager. Stoner and Wankel's implication is that management requires an individual to be many things. The key headings of Stoner and Wankel's (1986:6–8) description have been listed below to illustrate this point:

- Managers work with and through people.
- Managers balance competing goals and set priorities.
- Managers must think analytically and conceptually.
- Managers are mediators.
- Managers are politicians.
- Managers are diplomats.
- Managers are symbols.
- Managers make difficult decisions.

The implications for management development are somewhat demanding. A person going into management would seem to require experience in the diplomatic service, a seat in parliament, an ability to mediate, and proven leadership – to name but a few. A tall order for the training department of an organization! This example illustrates the complexity in creating a basis and direction for management development.

Descriptions of management that preceded Mintzberg (1973) contain similar elements but not in such detail. For example: in the early part of the century, the French industrialist, Henri Fayol, wrote that all managers perform five management functions: 'they plan, organize, command, coordinate and control' (Robbins, 1991:4). Robbins adds that 'today, we've condensed these down to four: planning, organizing, leading and controlling' (1991:4). Once again these definitions are extremely broad. The teacher undertakes the four activities described by Robbins (1991). The teacher plans, organizes, leads and controls the lesson. It could be argued that a teacher satisfied the 10 roles that Mintzberg describes as well as those of Fayol and Robbins in which instance the word 'teacher' is synonymous with 'manager'. While management is an aspect of the teacher's role, just as teaching may be part of a manager's role, neither is the core aspect of the other's job.

Placing these broad, abstract concepts into the tangible realistic development training for managers is problematic. At what stage is a manager deemed satisfactorily competent at managing uncertainty? The concept does not enable a management trainer, citing the criteria identified earlier to easily:

- assess the management development needs of an individual;
- provide a template for management development;
- measure the success of such management development programmes.

One description of the purpose of management is given by the Management Charter Initiative (MCI:1997:6): 'To achieve the organization's objectives and continuously improve its performance.'

The management role is divided into seven key roles which each contain units and elements of competence (for an overview of the MCI integrated structure see Table 18.1). The elements consist of performance criteria and knowledge requirements. Interestingly, this fits in with Drucker's (1974) claim that management cannot be understood except in terms of its performance dimensions. These performance dimensions, or competences as they are known (eg, Frank, 1991;Woodruffe, 1991), are the basis of the MCI description.

The MCI Management Standards (MCI, 1997:12) provide a very useful tool for those involved with human resource development:

> The Management Standards represent a benchmark of best practice in management in the UK today. They describe what is expected of managers at all levels; they also list the knowledge, understanding and personal competencies managers require in order to perform competently.

> Organisations and individual managers within them are encouraged to use the standards in any way that will help them achieve their objectives and continuously improve their performance. Organisations already put the Management Standards to a wide range of uses, including:
>
> - auditing management capability;
> - benchmarking organizational performance;
> - developing organizational structures;
> - improving the performance of individual managers;
> - defining job roles and job descriptions;
> - recruiting and selecting personnel;
> - identifying training and development needs;
> - defining personal development and continuing professional development programmes;
> - developing training programmes;
> - developing vocational and academic qualifications;
> - managing and assessing performance;
> - coaching and mentoring;
> - planning for succession and developing promotion criteria;
> - defining pay and reward schemes;
> - counselling managers for redeployment and redundancy.

The MCI integrated structure is shown in Table 18.1.

While the MCI concept of management may be very useful, it is still a description and not a definition. In describing what a manager does, it fails to explain what is required to be a manager. It ignores the essential essence of management – the factor 'X' (Handy, 1985). The defining feature of management enabling distinction from other activities such as teaching, without having to rely on descriptions, is absent. For the purposes of MTD, its usefulness is in its comprehensive cover of the role of the manager; the limitation is that it is relatively inflexible and is backward-looking in that it is based on a description which is, by definition, dated. In the constantly changing world of management it is always likely to be out-of-date. Determining the defining elements would seem to be essential to fully understanding management.

It may be that management is analogous to Wittgenstein's example of the aroma of coffee (cited in Mounce, 1988), or Nagel's (1979) example of what it is to be a bat – impossible to define.

Where does this leave MTD? How can MTD proceed if it is not possible to overcome the first hurdle, deciding what management is? Hospers (1990:122) argues that it is quite possible to understand what is meant without being entirely clear as to the precise constitution of a term:

Table 18.1 The Management Charter Initiative (MCI): The Integrated Structure

Manage Activities
Key Role A

The integrated structure

Key Role A: Manage Activities
Manage Activities describes the manager's work in managing the operation to meet customers' requirements and continuously improve its performance.

A1 Maintain activities to meet requirements
A2 Manage activities to meet requirements
A3 Manage activities to meet customer requirements
A4 Contribute to improvements at work
A5 Manage change in organisational activities
A6 Review external and internal operating environments
A7 Establish strategies to guide the work of your organisation
A8 Evaluate and improve organisational performance

Key Role B: Manage Resources
Manage Resources covers planning and using physical resources (money, premises capital equipment, supplies and materials) effectively and efficiently.

B1 Support the efficient use of resources
B2 Manage the use of physical resources
B3 Manage the use of financial resources
B4 Determine the effective use of resources
B5 Secure financial resources for your organisation's plans

Key Role C: Manage People
Manage People describes the work of managers in getting the most from their teams. It covers recruiting, training, building the team, allocating and evaluating work, and dealing with people problems. It also includes managing oneself and relations with others at work.

C1 Manage yourself
C2 Develop your own resources
C3 Enhance your own performance
C4 Create effective working relationships
C5 Develop productive working relationships
C6 Enhance productive working relationships
C7 Contribute to the selection of personnel for activities
C8 Select personnel for activities
C9 Contribute to the development of teams and individuals
C10 Develop teams and individuals to enhance performance
C11 Develop management teams
C12 Lead the work of teams and individuals to achieve their objectives
C13 Manage the performance of teams and individuals
C14 Delegate work to others
C15 Respond to poor performance in your team
C16 Deal with poor performance in your team
C17 Redeploy personnel and make redundancies

Table 18.1 *continued*

Key Role D: Manage Information	Key Role F: Manage Quality
Manage Information describes the manager's role in obtaining, analysing and using information effectively to take decisions. It also covers leading and contributing to meetings.	*Manage Quality* describes the specialist role of the quality manager, covering total quality management, quality assurance and quality control.
D1 Manage information for action D2 Facilitate meetings D3 Chair and participate in meetings D4 Provide information to support decision making D5 Establish information management and communication systems D6 Use information to take critical decisions	F1 Promote the importance and benefits of quality F2 Provide advice and support for the development and implementation of quality policies F3 Manage continuous quality improvement F4 Implement quality assurance systems F5 Provide advice and support for the development and implementation of quality systems F6 Monitor compliance with quality systems F7 Carry out quality audits
Key Role E: Manage Energy	**Key Role G: Manage Projects**
Manage Energy describes the role of those managers with special responsibility for ensuring the organisation develops and implements policies for using energy in the most efficient way.	*Manage Projects* describes the role of those responsible for planning, controlling and completing projects to the sponsor's satisfaction.
E1 Identify the scope for improvement in the way the organisation manages energy E2 Provide advice on the development and implementation of energy policies E3 Promote energy efficiency E4 Monitor and evaluate energy efficiency E5 Identify improvements to energy efficiency E6 Provide advice and support for the development of energy efficient practices E7 Provide advice and support for the development and implementation of systems to measure energy usage E8 Provide advice and support for improving energy efficiency	G1 Contribute to project planning and preparation G2 Co-ordinate the running of projects G3 Contribute to project closure G4 Plan and prepare projects G5 Manage the running of projects G6 Complete projects

> Among a definite set of characteristics, no one characteristic has to be present as long as all or even some of the others are present; but it cannot do without them all. This might as well be called the quorum feature of definitions. A quorum of Senators must be present before the Senate is officially in session, but no particular senator has to be there.

This is not to imply that an acceptable definition of management will be ambiguous but that the edges of the application of the definition may be unclear. In some situations the definition is clearly applicable and others not, but that there is an area where the applicability and usefulness of the theory is not clear cut. Guba (1990:17) in this instance discussing the use of the term 'paradigm', notes that there are great many ways in which the word is used, and argues that rather than those being a weakness, they can be considered a strength. Perhaps the same could be said of management:

> I believe that it is important to leave the term in such a problematic limbo, because it is then possible to reshape it as our understanding of its many implications improves. Having the term not cast in stone is intellectually useful.

It is sufficient to note here that management is not a clear and precise term on which MTD can be based. Before embarking upon a training programme it is first necessary to satisfy oneself that the outcomes of the programme relate to the concept of management as understood not only by the training organization, be it internal or external, but also by the organization for whom the training is being delivered. These are issues of culture and beliefs and are discussed in more detail later.

WHAT DO WE MEAN BY DEVELOPMENT?

Development can be likened to 'growth', except that the latter is often associated with getting bigger and the former is associated with getting better or wiser. The ever-changing nature of work necessitates a process of continual management development. As Fahey and Narayanan (cited in Segal-Horn, 1994:28) suggest, 'Without a willingness to consider alternative futures, an organization is likely to find itself constrained and victimized by its implicit presumption that the future is going to be largely a replication of the past.' It is perhaps for this reason that the IPD advocates 'continuous professional development' (CPD), the essence of which is continually developing managerial competence. This requires self-direction, self-management and responsiveness to the development opportunities, be they generated through work or outside of the workplace. The essential principles of CPD (adapted from IPD, undated:3) are:

- Development should be continuous in the sense that the professional should always be actively seeking to improve performance.

- Development should be owned and managed by the individual learner.
- CPD is a personal matter and the effective learner knows best what he or she needs to learn.
- Development should begin from the individual's current learning state.
- Learning objectives should be clear and wherever possible should serve organizational or client needs as well as individual goals.
- Regular investment of time in learning should be seen as an essential part of professional life, not an optional extra.

The process is one of self-development. The key to self-development is that learners take responsibility for their own learning: what they learn, when they learn, with whom they learn, where they learn and how they learn. In so doing, the learner accepts the consequences of choosing a programme or programmes of self-development.

Over the years the self-development approach has moved from periphery to centre stage and there are few training programmes in organizations today that do not include self-development elements in the design and delivery (Stansfield, 1996). While this can be seen as placing the power and control in the hands of the learner, a process typically referred to as 'empowerment', it can sometimes be used as a means of abdicating responsibility by the organization for the learner. It can also be used as a means of reducing expenditure on training programmes as coaching and developing staff is often time-consuming, demanding and expensive. Two sources that provide detailed and informative discussion of self-development are Pedler (1990) and Whittaker and Megginson (1996).

Current evidence from many companies suggests that as pressures increase on a managers' time and resourcefulness, more organizations are focusing on the facilitation of self-development. According to Whittaker and Megginson (1996) the reasons for the increasing popularity of self-development are as follows:

- society ebbs and flows between individual choice on the one hand and social and organizational definitions of what is needed on the other; currently we seem to be approaching the end of a trend towards individualization;
- the increase in the 'unprogrammability' of jobs which makes teaching and course-based training design much less relevant to the work of organizations;
- a move from role cultures to achievement cultures;
- the removal of layers of management has meant that people have had to fend for themselves and use their own best judgement more. The knowledge explosion and the proliferation of specialisms implies that bosses, trainers and experts of all sorts find it harder than before to know as much about jobs as the people doing them. Organization capability is decreasingly located in the plant, finance and systems of the firm, and increasingly in people's heads, so these staff need to be in charge of their own development;

- people doing skilled and professional work are less likely than before to be actually employed by the organization, and more likely to work as consultants, contractors or suppliers – the flexible firm; and, in the extreme, the virtual firm: companies with huge turnover but only a handful of actual employees;
- learning at the start of a career that lasts a lifetime applies to nobody's job nowadays: continuous learning is the norm;
- as organizations federalize or fragment into business units, new forms of organizational 'glue' are needed to keep the enterprise together. The networking involved in self-development provides a powerful bond between people who may not work directly together.

The historical precedent for self-development pre-dates modern changes in business practice. Successive Indian civilizations have for thousands of years developed methodologies for self-discovery, self-improvement and self-development (Parikh, 1991:10):

> The relevance becomes even more clear when you reflect on the evolution of management over time. The initial focus was on 'how to get more and better work done through machines'. The next step was 'how to get more and better work done through people'. Now the emerging interest is in 'how to develop people through work'. The thrust of management now is more towards 'mobilizing' rather than just 'organizing'. This implies creating an environment that makes better people out of your employees, rather than just better employees out of your people. Unless the people are developed to their maximum potential, corporations cannot achieve their best, reach their peak performance level, and maintain it. This is what managing yourself is all about.

Valuable lessons can be learnt from other cultures, not least the opportunity to challenge widely held beliefs on the way management should be conducted. A cautionary note is offered by Ackers and Preston (1997) who argue that the differences between cultures means that it is rarely an easy process of transplanting a differing approach in full. For a discussion on the differences between cultures and the way in which they affect business, see Daniels and Radebaugh (1995), Franke *et al* (1991) and Harris and Moran (1996).

Given the importance of self-development, the lack of time allocated by managers for self-development, management development or the coaching and development of staff is of concern. If Parikh's (1991) argument is accepted, everything a manager does is an opportunity for self-development and time taken to realize this potential should be encouraged. There are numerous tools and techniques available to help with self-development, for example: life lines, life planning, career development, self-awareness, action learning sets, learning logs and personal portfolios. The benefits of maintaining a personal portfolio incorporating a record of work done and knowledge and skills acquired are:

- a personal portfolio provides a record of work done – useful when seeking a new appointment;
- it assists in career development;
- it provides evidence of performance and development;
- it helps in determining the direction and focus for self-development;
- it can provide evidence of both corporate and team portfolios;
- it can be used to illustrate the benefits of tasks done;
- it can assist in appraising performance in the absence of a formal process.

A personal portfolio might include:

- a work file and/or box in which information is stored;
- cross-referenced achievements detailing learning outcomes, experience and skills acquired;
- materials such as copies of reports produced, publications and products;
- certificates for academic, vocational and non-vocational qualifications;
- details of ongoing studies;
- job specifications of previous and current posts including original advertisements;
- newspaper or newsletter cuttings, reports, photographs, video and audio tape footage;
- professional links with other organizations;
- learning logs.

The process of self-development is as much an issue of personal development as it is management development. It could be argued that to treat management development as a separate issue distinct from developing the person is akin to the mind/body fallacy of Cartesian Dualism (Hospers, 1990). That is to say the two cannot be viewed separately. If you develop the manager, you develop the person; if you develop the person you develop the manager. The issue then for management development is in terms of how to ensure that a skill learnt in one environment, for example managing the risk in outdoor activities, can be transferred and utilized in another setting such as managing a business. It is not a failing of the definition of management in that it is not possible to distinguish between a teacher and a manager, but that a teacher *is* a manager. On this basis, it could be argued that it is an issue of relatives, although not in a nihilistic sense (MacIntyre,1994). For the teacher, more of the workload is dedicated to teaching than managing and for the manager, more time is dedicated to administrative or strategic tasks than teaching. Both are inherently managerial by nature.

PERCEPTIONS OF MANAGEMENT TRAINING AND DEVELOPMENT

The third issue facing those working in MTD (the first being the problem of defining management, the second being the nature of development) is the validity of the various theories. Increasingly within the literature, concepts which have been considered almost *a priori* knowledge in MTD are being critically scrutinized, for example Holman *et al's* (1997) review of Kolb's theory of experiential learning and Reynolds' (1997) critical examination of learning styles. MacIntyre (1994:107) for example, takes a critical look at the research evidence on which contemporary management is based and describes from an alternative paradigm a very different way of viewing research into management:

> the social world of everyday, hard-headed, practical, pragmatic, no-nonsense realism which is the environment of management is one which depends for its sustained existence on the systematic perpetuation of misunderstanding and of belief in fictions … the realm of managerial expertise is one in which what purport to be objectively-grounded claims function in fact as expressions of arbitrary, but disguised will and preference.

The problematic nature of management and the increasing number of challenges to core concepts mean that it is necessary to understand the implicit assumptions inherent within the various MTD approaches. These different approaches are referred to here as paradigms, using the broad definition offered by Guba (1990:17): 'A paradigm is a basic set of beliefs that guides action, whether of the everyday garden variety or action taken in connection with a disciplined inquiry.' While this is the definition used here, Goodman (1997) discusses the various other ways in which the term is used.

Issues of paradigm are not questions of absolutes in that one paradigm is better than the others. They represent instead the perspective taken. If it were possible to determine which paradigm was categorically right or wrong,

> There would be no doubt how to practise inquiry. But all such belief systems or paradigms are human constructions, and hence subjected to all the errors and foibles that inevitably accompany human endeavours. (Guba, 1990:18–19)

Thus, the choice of MTD programme will reflect the perspective of the individual, the trainer and/or organization. For example, it is important for the individual concerned with the selection of MTD programmes to be wary of 'coffee table book' promises that offer for example 'common sense' approaches to management development. The hard-headed world of management (MacIntyre, 1994) that depends upon a common sense approach may have much appeal to the practitioner. However, the notion of common sense as justification has mythical validity. Common sense is not, as it would sometimes appear to be seen, *a priori* knowledge. Common sense is the 'unquestioned delimitation of the terrain of relevance from that of irrelevance' (Grey and Mitlev, 1995:79). To be guided by common sense may in fact be to entrap 'oneself-in the current "traditions" or "fads" dominant among the social groups to which we belong, at work or elsewhere' (Gill and Johnson, 1991:28). Common sense may be a little more than a convenient label under which to hide unresolved issues. Moreover, *common sense* is not always *common practice*!

The power of a commonly understood concept can be phenomenal. Consider the problems associated with persuading others that the world was round, or the difficulties experienced by Darwin when presenting his treatise. Thus caution must be exercised when employing a particular MTD approach to ensure that the technique has some validity and is appropriate. What is being argued here is not that one particular approach is necessarily better than another but to foster an awareness that while one approach may appear the obvious and the most logical approach it may do so not as a function of a carefully considered set of beliefs, values, morals and ethics but because of other variables which provide an illusion of credibility such as common sense. For example, consider the different ways in which management development is viewed. According to Ackers and Preston (1997:687):

> One perspective sees management development as a form of help and argues that it is necessary for managers to learn about the organizational culture for their own benefit and well being. The sense of confusion associated with a change of organization or job is intended to be lessened by senior management providing enough information to managers, so that they know what is expected of them and are able to feel part of their new place of work. Promotion opportunities and attendance on management training courses should not only provide the individual with additional knowledge and skills, but also result in improved job satisfaction and enjoyment overall. In this unitarist view, business needs and personal self-development happily coincide.

In contrast, alternative views of MTD do not see the relationship between the manager and the organization as quite so cosy. Höpfl and Dawes (1995) refer to management development not just in terms of the realization of potential but also in terms of regulation and control. As Ackers and Preston (1997:687) illustrate, 'Critics of MD (management development), on the other hand, argue that it occurs purely for the benefit of senior management and manipulates the individual managers involved.' In this view management development is perceived more in terms of the power of senior management over those in lesser positions. This is best exemplified by the unlikely event that a participant will criticize the MTD process in which he or she is involved because in so doing they are making a statement about the person who selected the methods in the first place. To criticize and destroy the training method upon which a company's strategy rests, is to call into question those who have advocated its use. It is, in effect, making a statement as to their competence in choosing such a method. An alternative way of knowing that seeks not to develop and better understand the MTD methods in use but fundamentally destroys the credibility upon which the method rests is hardly likely to find favour with those who have chosen the initial strategy (Ackers and Preston, 1997).

We have first-hand experience of working as consultants to organizations where individuals have challenged the perceived wisdom of the training methods to which they are being subjected. Unfortunately, in many such instances, rather than this being taken as an opportunity to review the validity of the technique used, those raising their concerns have been seen as either 'not part of the team', or 'of the wrong stuff' by the employing organization. Höpfl and Dawes (1995:26) illustrate the power of the relationship between those who have control over MTD programmes and those who do not. They suggest that:

> The pursuit of an appropriate management paradigm of managerial practice leads to a partial acknowledgement of the person and a partial extension of power. This fundamental and underlying paradox resides at the heart of management development.

The point being made is that while on the one hand MTD takes into account the need of the individual and provides appropriate resources, be it training or otherwise to meet those needs, it is still within the context of control of those who are in charge within the organization. Dispenza (1996:245) applies this line of reasoning to the notion of empowerment and concludes that:

> Those who do the empowering allow those who are being empowered a defined locus of power. I would argue that the term 'empowerment' involves the depoliticization of control. … Control is the underlying outcome, but the meaning of the relationship is managed … in such a way as to make the exercising of that control a less contentious issue: the idea of being empowered is a more comfortable prospect than being controlled (both for those doing the empowering and those being empowered), but the outcome may be the same.

Views such as those expressed by Dispenza (1996) and Höpfl and Dawes (1995) illustrate the careful way in which seemingly well understood terms, when scrutinized, turn out to be contradictory.

The world of management is a constantly changing environment, not just in terms of the greater opportunities brought about through changes in technology but also in terms of the way in which people work together. Increasingly there is an emphasis away from motivating and controlling staff in a mechanistic way to where responsibility is being divested more widely in the organization. The implications for MTD are that the approach taken needs to reflect the paradigm on which it is based. It should be able to reflect the changing culture of modern management and if necessary facilitate the change.

The difficulty is not only that there are differing perspectives about the purpose of MTD but also a change in the beliefs that underpin the way an organization is managed. To complicate the matter further, these changes vary from industry to industry, culture to culture and from one country to another. In the telecommunications market, the shift from state-owned organization to private company has resulted in a blurring of the boundaries between public and private sector MTD (Beard and Hartman, 1999). With some private sector managers taking 'time out' to work in voluntary organizations, elements of corporate MTD are transmogrifying the nature of voluntary sector MTD and vice versa (Paton and Hooker, 1990). Changes such as this are reflected in managerial behaviour often evidenced by a change in the language used, for example, from *control* to *empowerment* (Dispenza, 1996).

TECHNIQUES OF MANAGEMENT TRAINING AND DEVELOPMENT

In assessing the various tools that can be used in MTD the assumption being made is that it is possible to train and develop managers. As Smith (1993) noted, the nature/nurture argument, the influences of childhood and other experiences, may all play a part in the debate on how managers can or should be trained and developed. Wickens (1992:3) goes as far as to ask whether 'management development is dead'. He argues for a more holistic approach, an idea with which Doyle (1995) in his article on reforming management development appears to agree.

It is unsurprising given the conceptual problems described earlier that there are a great many tools and techniques offered. The cultural influences of other working styles, in particular the Japanese, mean that the range of techniques can be bewildering. For example, Collis (1993) drawing on Chinese philosophy, has no doubt that the secret lies in Confucianism. Parikh (1991) argues it is to Indian traditions that we should turn. Ackers and Preston (1997) argue that Japanese approaches might suit the Japanese culture but not that of the UK. In another ongoing debate, Ibbetson and Newell (1996) argue that 'adventure-based experiential learning' provides the key to effective management development. Again, it is possible to find those who disagree; for example Irvine and Wilson (1994) are more cautious in their support of what they term 'outdoor management development'.

A common theme throughout all the activities is an experiential element that reflects the pragmatic nature of management. Both Stoner and Wankel (1986) and Mintzberg (1973) argue that activities in MTD are essential. As Mintzberg (1973:188) somewhat esoterically described the process:

> One cannot learn to swim by reading about it. One must get into the water, splash around, and practise various techniques with advice from someone who knows what skills swimming requires. Eventually, with sufficient feedback, he (sic) learns to swim. The same holds true for management skills. The student must be immersed in the milieu; he must practise the skill; and he must receive constructive feedback on his performance from someone who understands the skill.

This would seem to make sense. It is hard to imagine that any amount of study will adequately equip a manager for the experience of having to inform an employee that their services are no longer required. As a nurse once said to one of us, 'You don't have to have had a baby to be a midwife – but it helps.'

The various approaches are described in more detail in Chapters 15 and 16. Listed below is a sample of the many and varied tools and techniques available:

- attending short courses, seminars, workshops, conferences;
- being coached by a more experienced colleague;
- forming a learning agreement;
- establishing a mentorship relationship;
- participating in a learning/support group;
- team working;
- undertaking a special project, assignment or consultancy;
- taking on a new area of responsibility;
- changing work practices or systems;
- a variety of on-the-job methods such as focused staff meetings, reading, discussion, reflection, observation and maintenance of a learning log;
- undertaking a research contract;
- seeking and receiving feedback;
- engaging in action research;
- action learning sets;
- qualification courses – educational, eg MBA, Masters degrees, or vocational programmes, for example, the MCI;
- outdoor management development (OMD) programmes – see the OMD case study;
- development portfolios;
- a secondment or exchange;
- critical incident techniques;
- SWOT analysis – strengths, weaknesses, opportunities and threats;
- specialist development consultants;
- providing cover, deputizing, shadowing.

OUTDOOR MANAGEMENT DEVELOPMENT PROGRAMMES

OMD has become increasingly popular as a method of developing managerial effectiveness. It relies on the use of a combination of classroom and outdoor activities to create an environment conducive to changing behaviour. It primarily focuses on personal development.

OMD courses are currently taking on a new dimension as designers reconsider the amount of physical recreational activity in the programmes which occurred as a result of instructor expertise in this area in many of the outdoor centres located in the National Parks in the UK. Such recreational activities were then translated into teamwork or leadership courses and have recently been criticized for their potential for deselecting or dis-interesting some participants, relying to some extent on physical strength or good psychomotor skills. New programmes increasingly have development specialists who are skilled in the design and facilitation of such programmes, and they have begun to incorporate community projects or environmental projects into the management development activities. This offers a greater sense of reality to the project, unlike the traditional 'planks and drums' exercises, as well as providing a sense of giving; which appears to enhance a participant's energy and possibly, the degree of transfer of learning (Beard, 1996). See Irvine and Wilson (1994) and Ibbetson and Newell (1996) for information.

EVALUATING THE EFFECTIVENESS OF MANAGEMENT TRAINING AND DEVELOPMENT

The other part of Levitt's (1983) suggestion about knowing where to go is not just that we know the starting point, but that we also know at what stage we are on the journey and when we have reached the destination. This is achieved through evaluation. Evaluating MTD is a challenging task. As Douglas (1983) noted, managing at any one time is a complex blend of skills. Determining whether the action of the manager is attributable to a particular programme of training or whether it a function of some other unknown variable can be difficult. A brief recollection of Elton Mayo's classic experiment (cited in Brown, 1988) illustrates the difficulty of determining what is or are the causal variable(s). Evaluation of MTD is subject to the same well-documented difficulties as experienced in social science research in general. To take the process of conducting interviews for example; there are difficulties with the translation of meaning (eg, Deutscher, 1984), differences in culture (eg, Daniels and Radebaugh, 1995) and problems of interpretation (eg, Emory, 1985). There is also the difficulty of determining whom to evaluate. Smith and Piper (1990:9) have identified four groups of people directly involved in MTD who should be involved in its evaluation:

1. the purchaser of training;
2. the training agency;
3. the trainee; and
4. the independent contracted assessor or researcher.

Consider the perspective identified earlier that an individual is unlikely to criticize a course because in so doing he or she is making a statement about those who organized the course. Given this, asking for an unbiased evaluation from a participant is perhaps optimistic. If the participant's evaluation is considered along with that of all the parties identified thus far as having a stake in the process – an evaluation by the organization which delivered the training or development; the colleagues of the individual, who should be asked whether they think the manager has improved in the areas for which the training was prescribed; possibly an independent review – then the perspective is likely to be more balanced. Too often, as Smith and Piper (1990:9) suggest, the 'potential value of these informed views is seldom realized'. More commonly an end-of-course questionnaire is distributed to the participant to be completed prior to their departure. This 'happy sheet' evaluation as it is known, because it is completed during the euphoria often associated with the end of a course, serves only to provide information as to whether the participants *think* they have changed rather than whether they *have* changed. Such an evaluation should be avoided. Information as to the effectiveness of a programme can only be known some time after an MTD programme has finished and the person has settled back into the working environment. The nature of the evaluation should take into account the difficulties associated with research into the social sciences. Texts such as Gill and Johnson (1991), de Vaus (1993) and Denzin and Lincoln (1994) give some idea of the many issues and variables involved.

KEY ISSUES TO CONSIDER

Before deciding on the appropriate MTD tool, it is first necessary to ask:

- What do I mean by management? That is to say, what are the skills required for the post of manager within the organization?
- What is the culture of the organization? The preferred method of MTD varies from one organization to another. For example, an organization dependent on volunteers will need to develop a different set of skills to those serving the public sector. (See the case study on BTCV illustrating their strategy for management development.) The public sector has different requirements to those of commercial businesses (see Sanderson and Foreman, 1996). In addition to the types of organization there are international variations in culture.
- What MTD tools are best suited to equipping the individual with the required skills, given the culture of the organization?
- How will the MTD intervention be evaluated both in terms of auditing the need and determining the effectiveness?

BRITISH TRUST FOR CONSERVATION VOLUNTEERS

This case study focuses on management training and development within the British Trust for Conservation Volunteers (BTCV), a voluntary organization that has been at the forefront of training and development issues in the UK environmental sector for many years.

The BTCV staff development programme and information pack is an example of a development that took place as a result of an external intervention by the UK Open University Business School at the invitation of the training and development manager and the chief executive. The BTCV senior managers were receptive to the need for change and welcomed the external consultation and research from the OU Business School.

The BTCV began in 1959 and some 20 years later, with 50–60 staff, made an appointment of a Fieldwork Adviser. In 1980 the Fieldwork Adviser became the National Training Officer. In 1987 a Training Unit was formed with four members of staff. The BTCV thus has a long history of involvement with staff and volunteer training. Many people who work in countryside organizations in the UK have some involvement with BTCV and its training programmes.

In 1984 a document called 'A Strategy for the Year 2000' predicted that some 120 training courses would be delivered in 1984, rising to 258 in 1987/8 – the equivalent of 4960 training days. There was a considerable investment in training, but this was in the form of training courses. The traditional training programme was successful to an extent, but a degree of scepticism existed as to whether the organization really cared about its staff and volunteers beyond simply investing in training programmes. Some staff suggested that managers sent people on a training 'course' to solve management problems and that little support was available as a follow up after the course.

In 1989 the Open University completed its study of 'Management development issues at BTCV' and suggested that BTCV had been through a period of rapid growth and change followed by a period of entrenchment. This resulted in staff being uncertain about priorities and entering a phase of low morale. Problems were partly due to insufficient management know-how and experience among those carrying substantial management responsibility. The BTCV was thus advised to develop and state its policy and philosophy on the development of its people. The Open University also came to the conclusion that the BTCV should develop a more integrated approach to staff training, to the development of its people and to staff/volunteer appraisal. The BTCV accepted the report and responded favourably. The report also suggested that the organization should develop a managerial style with loose-tight properties – a dispersed management team in which managers had considerable autonomy and discretion but also a team tied by a shared approach and a well defined set of basic procedures. More management support, rather than management control, was needed.

Some 20 managers met in 1989 to discuss the report under the guidance of the training manager and chief executive. BTCV eventually entered a new phase of staff and managerial training and development. The BTCV undertook to declare its policy and philosophy towards staff – and created a comprehensive staff development programme and guidance pack to help those who managed people. At that time it was ahead of many management development programmes that existed in the private, public or voluntary sector in the UK.

Caring for and developing staff starts from the advertisement of the post and the appointment of the successful person and continues through their induction, their development and training and through to their eventual departure. Managers needed to keep track of staff developments and many managers in BTCV were encouraged to develop a working staff/volunteer file for each person. They also developed a greater commitment to their own development of managerial skills.

CONCLUSION

The complexity of variables which constitute the MTD environment provide a rewarding and challenging sphere of work. Successful MTD interventions depend on ensuring that there is a 'best fit' between the needs of the individual, the organization and those responsible for the delivery of the programme. Lewis (1991) provides a useful framework for achieving the latter objective. What has been argued in this chapter is that because the process of MTD is fraught with a great many variables, it is essential that time is spent determining in the first instance what is meant by management. It is only when this is achieved that an assessment of the skills of managers can be undertaken to determine the type of MTD intervention required in order to furnish participants with the desired skills and knowledge. Determining the desired management style also enables effective evaluation. These strategies will ensure that a situation does not arise whereby managers are equipped with skills which conflict with the nature of the business. For example, if the culture of the business is based on a rigid hierarchy, advocating empowerment may cause frustration and conflict and ultimately loss of staff, or business, or both. Similarly, equipping managers with skills based on an American culture of business will not help when conducting business with Asian countries.

Given the immense complexity of management, it is easy to take any MTD intervention and find faults and criticize. This is an essential part of the process by which the tools and techniques used are developed to ever improve their effectiveness. Critics should note that while it is easy to find fault, attempting to improve the way in which we manage is a worthy quest and is better than not developing managers at all.

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