

HOW TO USE OUTSIDE RESOURCES

BY DONALD L.
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Every training and development professional, whether novice or sophisticated, should make selective use of outside resources to supplement those available within the organization. These outside resources can be divided into four categories:

1. Equipment and Aids
2. Packaged Training Programs for In-House Use
3. Consultants
4. Outside Training and Development Programs

Obviously, trainers need to buy or rent equipment and aids necessary to conduct effective training programs. The first step is to know what's available. The second step is to determine which ones are desirable and/or necessary. The final decision is whether to buy or rent.

What's Available?

The list keeps changing, of course, as new products are developed. The kind of products that could be helpful are:

Equipment: Projectors (movie, slide, overhead); Easels and flip-

charts; Boards (hook n' loop, magnetic, chalk); Videotape.

Aids: Films; Books, Training tools (exercises, games, tests, case studies).

The best way to keep up to date on what's available is to be an active member of the American Society for Training and Development (ASTD). You will be kept informed through: ads in the various training and development publications, exhibits at national and regional training conferences; and the mail you receive from manufacturers and distributors who have purchased the ASTD mailing list.

Packaged Training Programs

A number of organizations have developed packaged programs that you can purchase for immediate use. Some of these programs come with leaders as well as materials. Others include only materials and a detailed lesson plan on how to conduct the program. The value of these programs depends on two factors:

1. What alternatives do you have? If you have the knowledge and ability to plan and conduct

your own program, most packaged programs are of little value. If you don't have the internal resources to plan and implement a program, the purchase of a packaged program may be your best bet.

2. Do they meet your needs? A careful study should be made of the objectives, content and approaches to see whether it would fit your needs. Also, various programs should be considered to compare costs and benefits.

One word of advice: If you purchase a packaged program, don't be afraid to adapt it to fit your own situation. You may wish to eliminate, change or add to the content, aids and approach. This can make the difference between an effective program and one that becomes a disaster.

Using Outside Consultants

Books have been written on the selection and use of outside consultants. Some organizations have been very happy with the contributions made by outside consultants and others have been really "burned." The process of selecting an outside consultant should be essentially the same as hiring an em-

"If the consultant you are considering has done similar work for another organization, call the key person in the organization and find out what kind of a job was done."

ployee. This means that careful screening should be done. Here is a list of steps to follow:

1. Determine your needs — what kind of help are you looking for? Do you want someone to help you evaluate your approach, develop a program, teach a seminar or what?

2. Know which consultants can meet your needs. In general, the more you have to consider, the better your selection can be.

3. Evaluate the consultants by means of correspondence, telephone conversations, interviews and reference checks. I've found that most potential clients don't ask for reference checks and this could be a serious mistake. If the consultant you are considering has done similar work for another organization, call the key person in

the organization and find out what kind of a job was done.

4. Negotiate a fair and clear agreement of exactly what the consultant will do for you. Know ahead of time the entire cost.

5. If you aren't positive that you want a long-term arrangement, hire the consultant to do one particular job. If it works out well, you can negotiate a long-term contract.

6. Thoroughly orient the consultant to your organization. Be sure that he or she knows the things about your organization that are related to the work the consultant will do.

Use of Outside Programs

Most organizations make use of outside programs presented by universities, professional organizations or consultants. Sometimes

money is well spent and benefits far outweigh the costs. In other cases, the program was a complete waste of time. Here are some suggestions to be sure you get your money's worth:

Selecting the Programs to Attend

In order to select the best programs, several steps should be followed.

A. *Find out what programs are available:* The process for selecting programs to attend is the same as it is for selecting people for a job. The more choices there are, the better the selection possibilities. Therefore, an organization should know what programs are available. Some personnel managers and training directors are reluctant to have their names added to mailing lists. This is a mistake. They should receive as many bulle-

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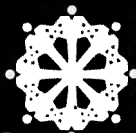
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tins as possible so they can select the programs that will provide their organization with the most benefits for the least investment.

Organizations which offer management development activities fall into the following categories:

1. Universities and Colleges
2. Professional Associations
3. Employers and Trade Associations
4. Private Organizations (Consultants, etc.)

In order to find out what programs are available in your area, contact the above type of organizations. Also, contact the management development departments in the larger companies in your community to see what resources they use.

B. Evaluate programs:

1. Study the Bulletins: Careful reading of program bulletins will provide some indication of the content, quality of leaders, and pertinent information on cost and possible benefits. However, it should be kept in mind that the subject content, qualifications of the lead-

ers, and benefits may be exaggerated by some organizations in order to sell enrollments.

2. Evaluate Your Participation: The best way to judge relative merits of different programs is to use a systematic method of evaluating participation. After each program the participant should be required to fill out an evaluation form. An analysis of these forms will provide data for determining future participation.

3. Contact Other Participating Organizations: If your organization has no evaluation of past participation, contact other organizations which have participated in the programs you are considering. The names of contacts can usually be obtained from the organization sponsoring the programs. In checking out these references, care should be taken to get objective and specific evaluations.

C. Make a decision: In deciding whether or not to participate, a number of factors should be considered. All of these factors will help to answer the basic question — "Is the program worth the time and money?"

1. Training Needs (Present and Future): What kinds of training for what kinds of people will reap the greatest benefits?

2. In - Company vs. Outside Training: What internal training capabilities do you have? Which will be most effective? In what areas are you better off using outside resources?

3. Budget and Costs: How much money should you set aside for training and development of your people? How much should be for in-company training? How much for participation in outside programs? Should the line department (production, marketing, engineering, etc.) be charged for outside management development programs or should all costs be charged to one central department? (Both methods are widely used.)

Selecting Participants

The training director or other staff person can help determine which management development organizations offer high - quality programs at the least cost. The selection of the participants, how-

ever, should be a line decision for several reasons:

- Line managers are in the best position to match programs to needs — present and future.

- Line managers are in the best position to plan to cover for the participant during the program.

- Line managers should be completely aware of the objectives and content of programs their subordinates attend.

In selecting the person to attend a program, the "boss" and participant should discuss the program and its benefits to the individual, the department, and the company. Ideally, the participant should become enthused about the opportunity the company and the boss are giving him or her (instead of feeling he or she is being "sent" to be "straightened out").

Even though the decision to participate should be made by line managers, the training department can perform an important staff role by calling attention to worthwhile programs and assisting in selecting individuals to attend.

Preprogram Counseling

The main purpose of preprogram counseling is to assure maximum employee participation in selected programs. When a person has been selected for an outside management development program, he or she should be counseled *before* attending. The immediate supervisor should be involved in the counseling; someone from the training department may assist. Items for discussion should include the following:

A. Program arrangements: To assure the employee's interest in a particular program, counseling may be done as part of the process of selecting programs to attend. Discussion of program details will allow the participant to plan for his or her absence and make travel arrangements.

B. Program expenses: Arrangements for program expenses should be discussed, with attention to the program fee and what it includes, as well as any additional expenses for travel, lodging, meals or materials. The participant should know what the organization will

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pay for, whether or not he or she will have an expense account, and how much money will be needed if money is not advanced by the organization.

C. Preparation: The employee should be encouraged to participate in discussions both during program sessions and off hours. He or she should know in advance what reports, summaries or discussions are expected when returning from the program.

Postprogram Implementation

In order to obtain maximum benefits from attendance, it is necessary to approach postprogram discussions and implementation systematically.

A. Participant evaluation: Each participant should complete a written evaluation form as soon as he or she returns. This evaluation is designed to help the organization decide whether programs were beneficial to the participants and to the company, and whether others should attend similar programs in the future.

Written evaluations should be kept both as records of individual participation and for future reference on the organization presenting the program. The evaluations should be consulted when selecting future programs.

B. Program summary: The second step is to obtain a summary of what principles and techniques the employee learned in the program as well as the materials he or she brought back.

C. Practical application: The supervisor should discuss with the participant any ideas which might be implemented on the job. This gives the participant and supervisor a chance to work out arrangements for job changes. If a particular idea that was brought back from the program is not feasible for the organization to implement, this should also be discussed with the participant.

D. Follow-up: The final step is to discuss any follow-up to the program. Perhaps another institute should be scheduled for the participant. Or, other persons should be scheduled for a similar institute. Another follow-up possibility is to have the participant further his or her self-development by reading

selected articles or books.

In addition, the immediate supervisor should follow up with the subordinate to assist in the implementation of changes.

Finally, attempts should be made by the training department and/or the immediate supervisor to determine the effectiveness of changes in the behavior of the participant.

Keeping Records

It may seem obvious that records should be kept to show participation in management development programs. However, it is common to find organizations in which no one knows what programs employees have attended. The records should include:

A. Who has attended what programs: (These records should be kept in the individual's personnel file as well as in a file of total participation.) This is important information when considering an individual for promotion, salary review, on-the-job coaching, and other personal considerations. It is also essential in planning for future participation.

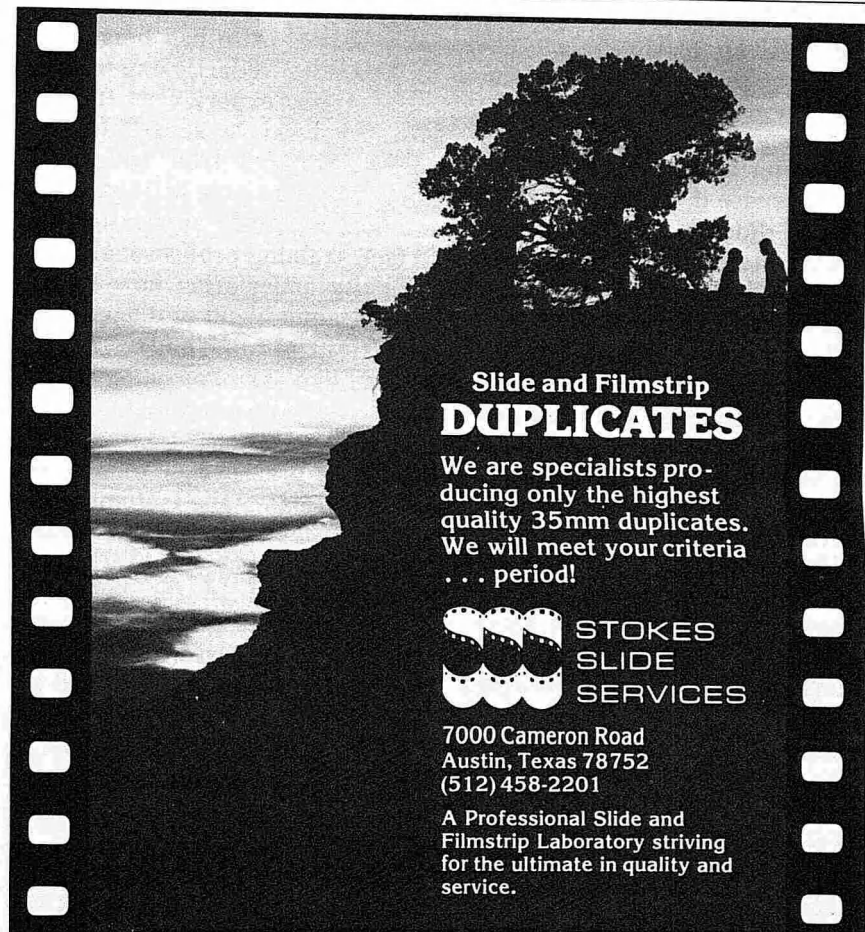
B. Evaluation sheets: These are

important to use in discussing the program with the participant so that maximum benefit can be gained. They are also important in selecting future programs to attend. For examples, several of these will help to establish data concerning the quality of programs offered by the various organizations.

C. Cost records: How much is being spent? (Include fees, travel, and all other costs.) This data will help when comparing the costs for programs offered by various competing organizations. It will also help in budgeting for future years.


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Editor's Note: The final part of Don Kirkpatrick's "How to Plan and Implement a Supervisory Training Program" will focus on "Evaluating In-House Training Programs." Watch for it in your September Journal.



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