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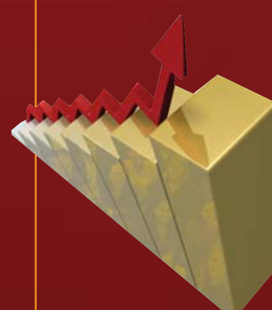

Canadian Awards for Training Excellence
CSTD
Winner 2007

2007 National Symposium

Assessment, Measurement and Evaluation...

May 3-4, 2007

Special Feature

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MESSAGE FROM THE CHAIR

You know you're grown up when people start paying attention to you. Last year both CSTD and I celebrated our 60th birthdays. One of us has grown up. My wife Elizabeth will tell you I may have grown older but I will never grow up. CSTD on the other hand has truly come of age and we are being recognized.

It's not just our association, but our profession, that has come of age. It's time we all stood up to be counted. I think of the Molson Canadian advertisement where Joe Canadian stands up and shouts, "I Am Canadian!" The Certified Training and Development Professional (CTDP) designation shouts loud and clear, "I am a qualified professional"—a certified learning and development specialist.

CSTD's level of professionalism has risen considerably now that fifteen percent of our members have either already obtained their CTDP designation or are enrolled in the certification program. Fifteen percent is a great start but I ask myself, "Why isn't it higher?"

If you look at the Employment section of the CSTD website, you'll notice something different from even a year ago. (www.cstd.ca/employment_centre) Many of the job postings are actively looking for candidates who have achieved their certification. Why? It's a symbol of competency and ethical behaviour among workplace learning professionals. To hold the designation means you have earned the respect of your peers in your chosen profession.

Let's have a look at the objectives of the CSTD certification program:

- To establish standards of professional practice so practitioners and service-users know the performance standards with regard to competency and ethical behaviour.
- To provide quality assurance to practitioners and employers/clients, learners and other stakeholders that the knowledge, skills and practice of the training and development professional meet published standards.
- To recognize the credibility, respect and professional status of the certified practitioner.

Many organizations today are waging a war for talent. Skilled and knowledgeable professionals are in high demand. Achieving the CTDP or the Certified Training Practitioner (Tier 1 for the professional trainer/facilitator) designation gives you a leg up in demonstrating your value to a potential or current employer.

During my 25 years in this profession I have worked in all aspects of learning and development. I have met many talented individuals, and I have learned from all of them. Today I ask myself, why haven't they obtained their CTDP? I am sure many think —as I did— that they are too busy and don't have time to complete the program.
I'm proud to say that last year I achieved my CTDP designation. For the life of me, I can't understand why it took me 60 years to decide to do it.

I encourage you to join the growing number of CSTD members who are pursuing certification. I can guarantee you it's worth the time and the effort! Stand up and be counted!

Stan White, CTDP
Chair of the Board

MESSAGE DU PRÉSIDENT DU CONSEIL

Vous savez que vous êtes devenu mûr quand les gens commencent à vous accorder une certaine attention. L'an dernier, la CSTD et moi avons tous deux célébré notre 60e anniversaire. L'un de nous deux a mûri. Mon épouse Elizabeth vous dira que j'ai peut-être vieilli, mais jamais je ne mûrirai. La CSTD par contre a maintenant atteint l'âge de la maturité et c'est une organisation qui est aujourd'hui reconnue.

Ce n'est pas seulement notre association qui est devenue mûre, mais notre profession elle aussi. Il est temps que nous nous levions tous pour qu'on nous remarque. Cela me fait penser à la publicité de la bière Molson Canadian dans laquelle « Joe Canadian » se lève et crie : « I am Canadian! ». Le titre de CTDP *(Certified Training and Development Professional)* l'affirme lui aussi haut et clair : « Je suis un professionnel qualifié » – un spécialiste agréé dans le domaine de l'apprentissage et du perfectionnement.

Le degré de professionnalisme de la CSTD s'est nettement amélioré, maintenant que 15 % de nos membres ont déjà obtenu le titre de CTDP ou se sont inscrits au programme d'agrément. Quinze pour cent c'est un bon début, mais je me demande : « Pourquoi pas plus? ».

Jetez un coup d'œil à la section Embauche du site Web de la CSTD; vous y constaterez quelque chose de différent par rapport à il y a un an à peine (www.cstd.ca/employment_centre_fr). Dans un grand nombre de cas, ce sont des candidats agréés que l'on recherche. Pourquoi? Parce qu'il s'agit d'un gage de compétence et de comportement éthique parmi les professionnels de l'apprentissage en milieu de travail. Le fait d'être agréé signifie que vous avez acquis le respect de vos pairs au sein de votre profession.

Voyons maintenant les objectifs du

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MESSAGE FROM THE PRESIDENT

Montreal in the springtime—what could be more enchanting? Please join us May 3rd and 4th for the CSTD National Symposium on **Assessment, Measurement and Evaluation – *How to Know if Your Learning is Meeting Business Needs*.** Now more than ever, organizations need to know that every investment they make will produce business results. The World Economic Forum's 2005 Global Competitiveness Report detailed Canada's decline in competitiveness—we slid from 6th place in 1998 to 15th place in 2004.

Canadian businesses have been slow to fully appreciate the true value of training and skills development, spending less per employee than other OECD countries. So, it is timely for CSTD members to study the impact of workplace training and the alignment of organizational learning with industry needs. What can we learn from those who have developed working models that respond to the business needs of their organization?

We are delighted that keynote speakers France Dufresne and Sylvie Geneau from Cirque du Soleil will demonstrate how their organization has linked context, culture and business goals to their leadership development. The comprehensive Symposium program also includes case studies from Dofasco and Pfizer, a look at evaluating informal learning, as well as scorecarding and testing. The second day starts with the business case for training based on international ROI evidence, followed by two hands-on workshops. The program is capped off by a site visit to Cirque du Soleil. It promises to be an action-packed two days!

We are delighted to offer this Symposium to a bilingual audience. Keynote addresses will be simultaneously translated, and 50% of the concurrent sessions are in English and 50% are in French. This is a first for CSTD and we are proud that we are able to provide this service to our members.

Take a look at page 16 for full Symposium details and at page 18 for a taste of what Montreal has to offer. And be sure to read the articles by our presenters—they'll whet your appetite for more!

Lynn Johnston, CAE
President

MESSAGE DE LA PRÉSIDENTE

Montréal au printemps – quoi de plus enchanteur? Joignez-vous à nous les 3 et 4 mai prochains en vue du symposium national de la CSTD sur **L'évaluation et la mesure – *Comment savoir si votre apprentissage répond aux besoins professionnels***. Maintenant plus que jamais, les organisations doivent savoir que chaque investissement qu'ils font mènera à des résultats professionnels. L'édition 2005 du Global Competitiveness Report du Forum économique mondial traite en détail du fléchissement de la compétitivité du Canada – nous sommes passés du 6e rang en 1998 au 15e en 2004.

Les entreprises canadiennes sont lentes à bien saisir la valeur réelle de la formation et du perfectionnement des compétences, et dépensent moins par employé que d'autres pays membres de l'OCDE. Il est donc temps que les membres de la CSTD étudient l'impact de la formation en milieu de travail et l'alignement de l'apprentissage organisationnel sur les besoins des entreprises. Que peuvent nous enseigner ceux qui ont mis au point des modèles pratiques qui répondent aux besoins professionnels de leur organisation?

Nous sommes enchantés que les conférencières principales, France Dufresne et Sylvie Geneau, du Cirque du Soleil, nous montreront les liens que leur organisation a pu faire entre, d'une part, son contexte, sa culture et ses objectifs professionnels et, d'autre part, le concept du perfectionnement du leadership. Le programme détaillé du symposium comporte aussi des études de cas de Dofasco et Pfizer, un coup d'œil sur l'évaluation de l'apprentissage informel, de même que l'établissement de « cartes de pointage » et l'exécution d'essais. La seconde journée commence par l'analyse de rentabilisation des activités de formation en prenant pour base des preuves de RI internationales, et cela sera suivi de deux ateliers pratiques. Le programme se terminera par une visite sur place au Cirque du Soleil. Voilà deux jours remplis d'action!

Nous sommes heureux d'offrir ce symposium à un public bilingue. Les allocutions principales seront traduites simultanément, et 50 % des séances offertes en même temps seront en anglais et 50 % en français. Il s'agit là d'une première pour la CSTD, et nous sommes fiers de pouvoir offrir ce service à nos membres.

Jetez un coup d'œil à la page 17 pour tous les détails sur le colloque, ainsi qu'à la page 18 pour un aperçu des charmes de Montréal. N'oubliez pas non plus de lire les articles de nos présentateurs – ils aiguiseront votre appétit!

Lynn Johnston, CAE
Présidente

Learning That Sticks

Enhancing business impact of training through a team-based approach

By Dr. Carolin Rekar Munro, CHRP

One of the most persistent and perplexing challenges faced by training practitioners and organizations is how to enhance transfer of learning from training and performance improvement programs into workplace practice. We may be highly acclaimed in curriculum design and facilitation, and receive accolades for crafting brilliantly provocative training events, yet hit the proverbial wall when we discover— and admit—that few of our trainees actually integrate new knowledge into practice. In fact, they soon revert to their pre-training routines. Lack of transfer of learning is a widespread dilemma; studies report that between 60 – 90% of learning acquired through training is not applied to the job (Phillips & Phillips, 2002). Hence, the question—how do we translate theory into practice and make it stick?

In my own practice as a consultant and educator I have wrestled with the transfer challenge and have experimented with a range of approaches to bridge the theory-application gap. The purpose of this article is three-fold: to introduce a transfer of learning model that I developed and now use to facilitate training; to share results from a 12-month study testing the model's effectiveness as a transfer intervention; and to propose implications for practice. Of specific importance in evaluating the model is measuring its business impact to justify financial investment in training.

Research roadmap

An experimental design formed the basis of this study, and 280 participants representing a range of industries participated in one of nine two-day workshops on building client/customer-business partnerships. Data collection commenced six months after training, allowing time for evidence of transfer to surface. Both quantitative and qualitative data were collected from surveys, interviews, and organizational data tracking systems. The model was tested for use in external and in-house training programs with similar findings in both domains.

The structure of the model is based on a team approach to transfer of learning that is woven into the design of training and filtered into post-training. Fundamental to the model is an action research component. Trainees, having set individual performance goals that reflect what they would like to achieve from training, work in small teams during and after training to discuss applicability of the learning and to formulate action strategies that support achievement of their individual goals.

Teams have a proven track record for resilience in times of change, especially given their ability to collectively pool resources to manage transitions (Hackman, 2002). Heterogeneous teams, more than homogeneous groupings, strategize more innovative solutions to problems and demonstrate more advanced decision-making capabilities because of the fusion of ideas when diverse backgrounds merge (Athanasaw, 2003). The transfer framework capitalizes on the power of teams to manage change.

The stages of intervention

Housed within the model are three intervention stages: pre-training preparation, training in action, and post-training team collaboration.

Pre-training Preparation: Activating the Transfer Model

To launch the transfer process trainees are encouraged, before attending the training, to formulate a performance goal as a targeted outcome of that training. This is to be done in collaboration with their supervisors so that the goal reflects the strategic values and direction of their organization. To facilitate completion of this task, pre-training information is made available such as a detailed session description and objectives, content summary, agenda, and format. Explicit instructions for writing objectives that are clear and focused statements of anticipated behavioural change, measurement targets, and resources required are also provided.

Training in Action: Forming Transfer Teams and Collaboration

At the onset of training, trainees are randomly assigned to teams comprised of four to five members that remain together during and after training. The intent of team formation is to provide a heterogeneous forum for discussing applicability of training content, offering each other input in refining individual performance goals, and progressing to the next step of constructing action plans to support the goals.

Following the delivery of each learning module in the training session, time is allocated for teams to share how their learning feeds into their individual goals and action plans. Each team member has the opportunity to voice the relevance of the learning with their colleagues. Colleagues, in a consulting capacity, offer feedback and support, share knowledge and experience from their personal repertoire of best practices, and challenge each other to envision alternative routes to goal achievement. The consulting role is grounded in Knowles' (1980) adult learning principles proclaiming peer groups—with their mutual exchange of knowledge and experiences culminating in a climate of support and engagement—as the richest learning resources. Seyler, Holton, Bates, Burnett, and Carvalho (1998) concur, stating that peer support has a positive impact on transfer of learning by providing the necessary social support to move trainees toward their goals. Regular assessment of progress, followed by process modifications, is critical to effectively and efficiently reach their own and others' performance standards (Rekar Munro & Laiken, 2004).

Prior to the conclusion of training, teams plan for transfer of learning to their respective workplaces. To guide discussion, teams are encouraged to consider the following:

- implications of their proposed initiatives at the job, departmental, and organizational levels
- securing workplace support
- sustaining momentum
- internal and external resources required
- potential internal and external barriers
- approaches for minimizing or eliminating barriers
- approaches for measuring incremental and final outcomes
- expectations and guidelines for their post-training collaborations.

Post-Training Team Collaboration

Teams reconvene monthly to continue their collaboration—by teleconference, online or in person. The focus is on reporting goal progress, sharing experiences and insights, and seeking input on how to manage emerging challenges. Through pooling their collective wisdom, trainees are empowered with a rich array of possibilities to take back to the workplace. Subsequently, they can report to their team on actual outcomes in the workplace. Within this action research framework, teams engage in a cyclical process of formulating and experimenting

Team-Based Transfer of Learning Model

with goal strategies—evaluating their effectiveness and modifying direction to refine goal achievement.

There is no prescribed timeline for how long teams are to continue with post-training collaboration as this is at the discretion of their members. However, teams are encouraged to commit to the process until targeted goals are reached or members are confident that they can proceed independently. It is interesting to note that for research purposes teams met for a six month period, yet 65% of these teams chose to continue collaboration thereafter.

Results under the quantitative lens

As part of the research design, trainees and their supervisors tracked performance and reviewed progress six months after training. To heighten consistency in the evaluative component of this study, an evaluation matrix was designed and provided to the teams. Performance indicators included:

- incremental and final measurement targets
- effectiveness of approaches used to measure goal progress and achievement
- goal management strategies—including control of internal and external obstacles
- strategic relevance of action strategies
- effectiveness of resource allocation and access
- expenditure of resources against proposed budget
- application of learning from training
- financial and non financial gains resulting from the initiative
- projected long-term implications.

Performance Evaluation Results

Progress was noted in the following performance areas:

- clear and focused goals and action plans targeting strategic direction
- alignment of training with organizational priorities
- efficient and effective resolution of performance-hindering barriers
- more pronounced leadership and decision-making during goal execution
- heightened responsiveness and flexibility to change
- strong goal ownership and commitment to having an impact on strategic direction
- 'spill-over effect' with new projects framed within the organization's strategic direction
- fiscally responsible goal management.

Return on Investment

To set the context for ROI results, goal setting in this study predominantly centered on enhancement of client/customer acquisition, satisfaction, and retention. After six months, results indicated that 78% of trainees had achieved their stated goals with an additional 6% projecting completion within four months. In the cases where goals had been reached, 73% of the companies experienced an ROI above 1.00. Values ranged from 1.40 to 5.82, signifying that the training program resulted in net benefits between $1.40 and $5.82 for every dollar invested in training. Breakeven status was achieved by 19% of the companies, and the remaining 8% reported an ROI below 1.00—attributed to insufficient financial and human resources to continue supporting the project and, in two cases, a shift in departmental priorities. These results are favourable as measured against studies reporting 51% of training initiatives leading to improved employee performance and 47% linked to enhanced organizational performance (Saks & Belcourt, 1997).

Application of Learning

Application of learning was studied at one-month and six-month intervals following training. Surveys, interviews with trainees and supervisors, and performance evaluation data were used to tap into trainees' application patterns and to discern factors that advance and impede the use of training. After one month, an 80% on-the-job application of learning was detected followed by a surprising 64% application rating six months after training. In light of current studies reporting 62% application of learning immediately following training and a decline to 44% after six months (Saks & Belcourt, 1997), results from this study are encouraging.

From participant in the retail sector:

"When the learning is this application-intensive and you have your own network of colleagues that supports your goals, you become really committed to making your goals a reality."

According to the trainees, these results are attributed to the synthesis of application-centric design and delivery of training, and team strategy meetings that channelled learning into specific organizational contexts. With an application-based orientation anchored to pre, during, and post-training stages, trainees were continuously reflecting on, discussing, and steering action plans in the direction of organizational relevance. Training that concentrated primarily on the building blocks for moving theory into practice created a learning environment that was acutely relevant to the trainees, and consequently, they were more inclined to channel energy and learning into action.

Results under the qualitative lens

In-Training Team Collaboration

Participants welcomed and valued the team collaboration throughout the training. From their past experiences, setting goals and mapping action plans had traditionally been reserved for the end of training, once content had been fully disseminated. This did not leave enough time for the deep inquiry needed to form meaningful and actionable plans. Waning energy and attention as training nears completion—and, for some, a preoccupation with commitments awaiting them afterwards—meant that the task of assimilating content in order to pinpoint precise change initiatives was daunting and not well executed during the concluding stages of training.

In this study, in-training team meetings enabled trainees to hone in on each learning module and exhaust how new content fit with their goals. As a result of each post-module focus on application, trainees returned to the workplace confident that they had workable roadmaps for initiating change.

Post-training Team Collaboration: Sustaining Momentum and Commitment

Extending team collaboration into trainees' work worlds was cited as a driving force mobilizing trainees into action and sustaining momentum and commitment. Having journeyed together since the onset of training, and knowing each other's histories and the contexts within which each member works, teams emerged as the primary support system for transfer of learning and reaching the goal destination. The collaboration fostered confidence in forging ahead with goal strategies, greater accountability for following through with proposed plans, and success in goal execution.

Trainees remained fixed on their goals, confident that the team would be on hand with guidance, support, and reinforcement as needed. Knowing that teams would reconvene to report on strategies that originated from team input kept goals a constant on their radar, and kept trainees on track. Through this process, teams experienced the complexities of the theory-application transition and expanded their repertoire of best practices for goal strategy, implementation, and management. Ultimately, the team was credited for a relatively seamless transition from the classroom to the workplace.

There were some setbacks during the transfer process. These included:

- challenges in scheduling post-training meetings
- restricting meetings to agreed-upon times
- deterring team members from dominating discussions
- grounding each other in business reality when teetering on idealism
- confronting the Goliath of organizational obstacles with a dry well of suggestions.

As part of the training design, coaching in team self-management was provided to minimize the occurrence of such challenges.

Teams in the Role of Rescuer

Trainees emphasized the importance of the 'lifeline' that colleagues extended during collaboration. From their past experiences, goal formation and execution were individual and isolating pursuits often complicated by conflicting and pressing organizational demands. Divergent workplace personalities and behaviours threatened goal achievement. As organizational obstacles bubbled to the surface thwarting their initiatives, motivation soon diminished and trainees, in frustration, shelved their goals and retreated to former routines.

In this study, trainees—not directly embroiled in the daily challenges experienced by their team members—were able to offer refreshingly new perspectives and solutions for tackling the muddy waters of goal execution, often with laser precision. Many trainees were rescued by their team members; they were able to hang on to their originally proposed goals instead of settling for more manageable undertakings. Trainees affirmed that their colleagues were instrumental in arming them with the wisdom and skill to slice through obstacles with efficiency, effectiveness, and confidence—and at a faster rate than if they had resorted to their own resources.

Enhancing Strategic Accountability

Participating in goal-based transfer of learning sharpened trainees' understanding of the importance of and the process for aligning goals with organizational vision and strategy. For many trainees, the organization's strategic mandate had a history of being illusive, with little clarity regarding how to live the vision. Now, trainees could set targets, chart directions, and define measurable outcomes that could contribute to the business unit and organizational objectives. Their role in making the strategy come alive resulted in greater accountability and empowerment.

Surprisingly, trainees began to internalize the goal-based focus. They became increasingly intrigued with how organizations propel their vision into action, and how to respond through their own efforts. Trainees were experiencing an awakened or renewed consciousness regarding the vested responsibility of employees in shaping organizational direction. Some trainees moved their awareness into action by initiating dialogue with their supervisors to propose enhanced communication channels for filtering the strategy throughout the organization to activate widespread engagement.

Integrating a Goal-Based Process into Performance Evaluations

Supervisors indicated that with research evidence supporting ROI from goal-based transfer of learning, plans were underway to standardize goal achievement criteria for performance evaluations. The intent is to stress strategic accountability of training and to diffuse any assumptions that training can afford to be delivered in a vacuum void of strategic discussion. Plans also include the introduction of pre-training procedures requiring employees to propose goal statements prior to receiving training approval and funding. In doing so, the potential value of training in delivering outcomes grounded in organizational relevance can be tested, adding another layer of confidence when releasing funds for training.

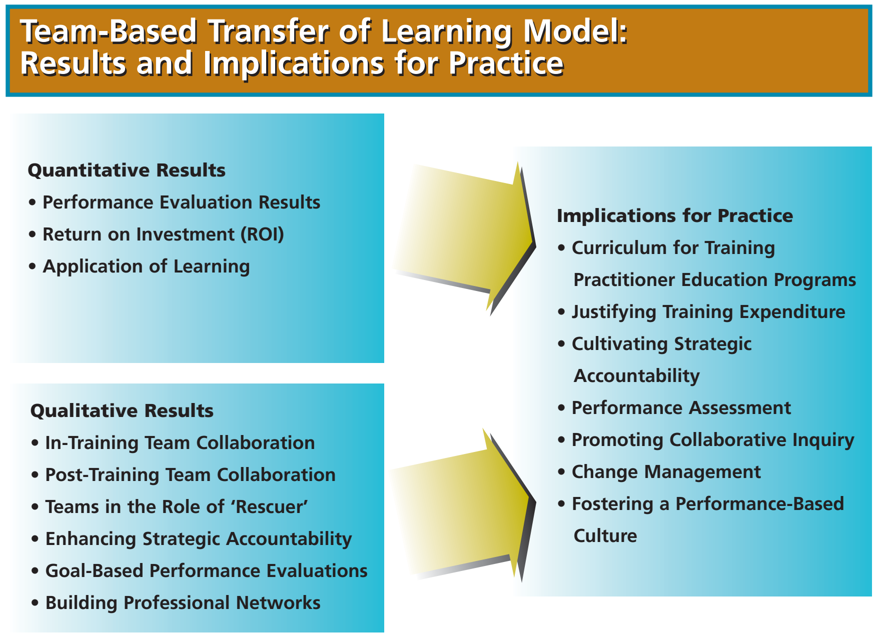
Building Professional Networks

In many cases, teams honed and nurtured bonds of professional respect and friendship that surpassed the expectations of this study. Originally united by a shared purpose, teams persevered through adversities and eventually celebrated successes together.

Team connections also helped with environmental scanning—tracking shifting trends and priorities in a complex and ever-changing business landscape. The heterogeneous composition of these teams fostered a rich platform for exchange of information, especially industry-based best practices. As well, the network led to partnerships on other business ventures and provided access to resources such as professional referrals.

Implications for practice

Rooted within many organizational infrastructures is a detachment between strategic direction and employee involvement. Strategy is often experienced as a management owned and directed entity with employees as bystanders awaiting how the strategic initiative plays itself out. This training model may serve as a vehicle for shifting employees from strategic inertia to participation; they set goals and action plans that personalize their contribution to the strategy. Embedding the model into training could redirect employees from an



exclusive content-acquisition focus to one centered on application of learning to fit the organization's strategic imperative. If this becomes common practice it could lead to widespread organizational involvement in carving signature responses to strategic direction. According to Montesino (2002), transfer of training is higher for trainees who perceive a strong connection between training and the organization's strategic vision.

Conclusion

If we choose not to respond to the lingering divide between theory-based learning and application, we risk the continuing expenditure of valuable resources on training that may or may not result in workplace change. Lacking an effective mechanism for navigating theory into practice could perpetuate status quo thinking and behaviours that stifle organizational effectiveness and efficiency in a global landscape of change.

The model presented in this study offers training practitioners a novel approach that can be built into their training designs to bridge the disconnect between learning and practice, and promote dialogue between practitioners about best practices for transfer of learning. Over time, transference could become common practice, taking its rightful place as equal in importance to—if not more important than—other components of the training architecture. When transfer of learning takes centre stage in the evolution of progressive benchmark standards and practices in training, practitioners will be able to respond to and lead in an era of perpetual change with even greater efficiency and effectiveness.

Dr. Carolin Rekar Munro, CHRP, is Professor and Coordinator of Human Resources at Durham College, sessional instructor at the University of Ontario Institute of Technology, and a consultant specializing in teambuilding, performance management, and organizational development and renewal.

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Un apprentissage qui perdure

Améliorer l'impact de la formation au moyen d'une approche fondée sur le travail en équipe

Par Dr. Carolin Rekar Munro, CHRA

L'un des défis les plus persistants et complexes auxquels se heurtent les praticiens et les organismes spécialisés en formation est de savoir comment améliorer la mise en pratique, dans le milieu de travail, de ce que l'on apprend dans le cadre des programmes de formation et d'amélioration du rendement. Nous avons peut-être bien une excellente réputation au chapitre de la conception et de la facilitation de programmes d'études, et on nous congratule pour les activités de formation particulièrement originales que nous créons, mais nous butons pourtant contre le mur proverbial lorsque nous découvrons – et reconnaissons – que peu de nos stagiaires mettent réellement en pratique les nouvelles connaissances qu'ils acquièrent. En fait, ils reviennent rapidement à ce qu'ils faisaient avant de suivre une formation. Le manque de transfert de l'apprentissage est un dilemme généralisé; selon certaines études, entre 60 % à 90 % de l'apprentissage acquis grâce à la formation n'est pas appliqué au travail (Phillips & Phillips, 2002). D'où la question suivante : comment fait-on pour transformer la théorie en pratique et faire en sorte qu'elle perdure?

Dans mon propre travail en tant que consultante et éducatrice, je me suis débattue avec ce défi que pose le transfert et j'ai mis à l'essai un éventail d'approches pour combler l'écart entre la théorie et l'application. Le présent article vise un triple but : présenter un modèle de transfert de l'apprentissage que j'ai conçu et que j'utilise maintenant pour faciliter la formation; faire part des résultats d'une étude de douze mois qui a permis d'évaluer l'efficacité du modèle en tant que mécanisme de transfert; et proposer des résultats à mettre en pratique. Un aspect particulièrement important de l'évaluation du modèle est la mesure de son incidence sur les activités, afin de justifier les investissements financiers qui sont faits dans le domaine de la formation.

La carte routière de la recherche

L'étude est fondée sur un plan expérimental, et 280 participants représentant un éventail de secteurs ont pris part à l'un des neuf ateliers d'une durée de deux jours qui ont porté sur l'établissement de partenariats professionnels entre la clientèle et le milieu de travail. La collecte de données a débuté six mois après la formation, ce qui a donné le temps nécessaire pour que des signes de transfert commencent à apparaître. Des données à la fois quantitatives et qualitatives ont été obtenues à partir de sondages, d'entrevues et de systèmes de suivi de données organisationnelles. Le modèle a été mis à l'essai en vue de son utilisation dans le cadre de programmes de formation externes et internes, et les constatations relevées dans les deux domaines sont similaires.

La structure du modèle de transfert de l'apprentissage repose sur une approche fondée sur le travail en équipe; cette approche est intégrée à la conception de la formation et est maintenue pendant la période postérieure à la formation. Un aspect fondamental du modèle est un élément de recherche-action. Les stagiaires, après avoir fixé les objectifs de rendement individuels qui reflètent les résultats qu'ils aimeraient obtenir grâce à la formation, travaillent en petites équipes pendant et après la formation afin de discuter de l'applicabilité de l'apprentissage et de formuler des stratégies d'action qui étayent la réalisation de leurs objectifs personnels.

Les équipes ont la réputation d'être souples en périodes de changement, grâce surtout à leur aptitude à mettre en commun des ressources en vue de gérer les transitions (Hackman, 2002). Les équipes hétérogènes, plus que les groupements homogènes, conçoivent des solutions plus innovatrices aux problèmes et font montre de capacités décisionnelles plus avancées à cause de la fusion d'idées qu'engendre la combinaison d'antécédents diversifiés (Athanasaw, 2003). Le cadre de transfert tire profit de la capacité qu'ont les équipes de gérer un changement.

Les étapes d'intervention

Le modèle comporte trois étapes d'intervention : la préparation préalable à la formation, la formation en action, ainsi que la collaboration postérieure à la formation.

Préparation préalable à la formation : la mise en activité du modèle de transfert

Pour lancer le processus de transfert, on encourage les stagiaires, avant qu'ils assistent à la formation, à formuler un objectif de rendement qui constituera un résultat ciblé de la formation. Cela doit être fait en collaboration avec leurs superviseurs, de manière à ce que l'objectif fixé reflète les valeurs et l'orientation stratégique de leur organisation. Pour faciliter l'exécution de cette tâche, des informations préalables à la formation sont mises à leur disposition, comme une description et les objectifs détaillés de la séance et les objectifs connexes, un résumé du contenu, le programme et la structure. Sont également fournies des instructions explicites sur la rédaction d'objectifs, c'est-à-dire des énoncés clairs et précis sur le changement comportemental anticipé, les objectifs de mesure et les ressources requises.

Modèle de transfert de l'apprentissage en équipes

La formation en action : la formation d'équipes de transfert et la collaboration requise

Dès le début de la formation, les stagiaires sont affectés au hasard à des équipes formées de quatre ou cinq membres, qui demeurent ensemble pendant et après la formation. L'intention de la formation des équipes est de fournir un moyen hétérogène de discuter de l'applicabilité du contenu de la formation, de permettre à chacun de préciser les objectifs de rendement individuels et de passer à l'étape suivante, laquelle consiste à dresser les plans d'action destinés à soutenir les objectifs visés.

À la suite de chaque module d'apprentissage faisant partie de la séance de formation, on alloue du temps aux équipes pour faire part aux autres de la manière dont leur apprentissage s'intègre à leurs plans d'action et à leurs objectifs individuels. Chaque membre d'équipe a la possibilité de faire part à ses collègues de la pertinence de l'apprentissage. Les collègues, en leur qualité consultative, offrent une rétroaction et un soutien, font part de leur savoir et de leur expérience en puisant dans leur répertoire personnel de pratiques optimales, et s'encouragent mutuellement à songer à d'autres moyens d'atteindre les objectifs visés. Le rôle de consultation est fondé sur les principes de Knowles (1980) en matière d'apprentissage des adultes, principes selon lesquels les groupes de pairs – dont l'échange mutuel de savoir et d'expérience crée un climat de soutien et d'engagement – constituent les sources d'apprentissage les plus fécondes. Seyler, Holton, Bates, Burnett et Carvalho (1998) souscrivent à ce concept et déclarent que le soutien des pairs a un impact positif sur les transferts d'apprentissage parce qu'ils assurent le soutien social dont les stagiaires ont besoin pour atteindre leurs objectifs. L'évaluation régulière des progrès accomplis, suivie des modifications nécessaires au processus, est une étape indispensable pour atteindre de manière efficace et efficiente les propres normes de rendement personnel ainsi que celle des autres (Rekar Munro & Laiken, 2004).

Avant la fin de la formation, les équipes planifient la façon dont l'apprentissage sera transféré à leurs lieux de travail respectifs. Pour orienter la discussion, on encourage les équipes à prendre en considération les aspects suivants :

- les répercussions des initiatives qu'elles proposent d'appliquer au sein des postes, au sein du service et au sein de l'organisation;
- l'obtention de l'appui du lieu de travail;
- le maintien de l'élan acquis;
- les ressources internes et externes requises;
- les obstacles internes et externes possibles;
- les façons d'amoindrir ou d'éliminer les obstacles;
- les façons de mesurer les résultats intermédiaires et définitifs;
- les attentes et les lignes directrices qui s'appliquent aux activités menées en collaboration après la formation.

Collaboration en équipe après la formation

Les membres des équipes se rencontrent tous les mois pour poursuivre leur collaboration – par conférence téléphonique, par Internet ou en personne. L'accent est mis sur le fait de signaler les progrès accomplis par rapport aux objectifs visés, de partager des expériences et des idées, ainsi que de prendre connaissance de moyens de gérer les nouveaux défis. Grâce à la mise en commun de leur sagesse collective, les stagiaires se dotent d'un riche éventail de possibilités qu'ils peuvent ramener à leur lieu de travail. Par la suite, ils sont en mesure de rendre compte à leur équipe des résultats réellement obtenus en milieu de travail. Dans ce cadre de recherche-action, les équipes s'engagent dans un processus cyclique de formulation et de mise à l'essai de stratégies d'élaboration d'objectifs – elles évaluent ainsi leur efficacité et modifient la direction qu'elles suivent de façon à mieux atteindre leurs objectifs.

Il n'y a pas de limite prescrite pour ce qui est du temps pendant lequel les équipes poursuivent cette collaboration « post-formation », car cela se fait à la discrétion de leurs membres. On les encourage toutefois à suivre le processus jusqu'à ce que les objectifs visés aient été atteints ou que les membres soient sûrs de pouvoir continuer seuls. Il est intéressant de signaler que, pour les besoins de la recherche, les équipes se sont rencontrées pendant six mois; cependant, 65 % d'entre elles ont décidé de poursuivre leur collaboration par la suite.

Les résultats sous l'angle quantitatif

Dans le cadre du plan de recherche, les stagiaires et leurs superviseurs ont suivi le rendement et examiné les progrès accomplis six mois après la formation. Pour rehausser l'uniformité de l'élément « évaluation » de cette étude, une matrice d'évaluation a été conçue et remise aux équipes. Les indicateurs de rendement étaient les suivants :

- les objectifs de mesure intermédiaires et définitifs;
- l'efficacité des approches suivies pour mesurer les progrès accomplis par rapport aux objectifs fixés;
- les stratégies de gestion des objectifs – y compris le contrôle des obstacles internes et externes;
- la pertinence stratégique des stratégies d'action;
- l'efficacité des ressources allouées et de l'accès à ces dernières;
- les ressources dépensées par rapport au budget proposé;
- l'application de l'apprentissage issu de la

formation;
- les gains financiers et non financiers découlant de l'initiative;
- les répercussions prévues à long terme.

Résultats de l'évaluation du rendement

Des progrès ont été relevés dans les secteurs suivants :

- des objectifs et des plans d'action clairs et ciblés, axés sur l'orientation stratégique;
- l'alignement de la formation sur les priorités organisationnelles;
- l'élimination efficace et efficiente des obstacles au rendement;
- un rôle de leadership et un processus décisionnel plus marqués lors de la réalisation des objectifs;
- une sensibilité et une souplesse accrues par rapport au changement;
- un sentiment d'appartenance marqué, et la détermination à avoir une incidence sur l'orientation stratégique;
- un « effet de débordement » se traduisant par l'élaboration de nouveaux projets au sein de l'orientation stratégique de l'organisation;
- une gestion d'objectifs sérieuse d'un point de vue financier.

Rendement des investissements (RI)

Pour situer dans leur contexte les résultats obtenus sur le plan du rendement, le travail de détermination des objectifs effectué dans le cadre de la présente étude a été principalement axé sur l'amélioration de trois aspects liés à la clientèle : l'acquisition, la satisfaction et la conservation. Après six mois, les résultats ont indiqué que 78 % des stagiaires avaient atteint les objectifs qu'ils s'étaient fixés, et que 6 % de plus prévoyaient que cela se ferait dans les quatre mois suivants. Là où les objectifs avaient été atteints, 73 % des entreprises avaient obtenu un rendement supérieur à 1,00. Les valeurs variaient entre 1,40 et 5,82, ce qui signifie que le programme de formation avait donné lieu à des avantages nets variant entre 1,40 $ et 5,82 $ pour chaque dollar investi dans le domaine de la formation. Le seuil de rentabilité a été atteint par 19 % des entreprises, et les 8 % des autres ont déclaré un rendement inférieur à 1,00 – ce résultat a été imputé à des ressources financières et humaines insuffisantes pour continuer de soutenir le projet et, dans deux cas particuliers, à un changement dans les priorités du service. Ces résultats sont favorables lorsqu'on les mesure par rapport à ceux d'études selon lesquelles 51 % des initiatives de formation mènent à une amélioration du rendement des employés et 47 % sont liées à une amélioration du rendement organisationnel (Saks & Belcourt, 1997).

Mise en application de l'apprentissage

La mise en application de l'apprentissage a été étudié à la suite de la formation, à des intervalles d'un mois et de six mois. Des sondages, des entrevues avec des stagiaires et des superviseurs, ainsi que des données sur l'évaluation du rendement ont été utilisés pour prendre connaissance des méthodes d'application des stagiaires et discerner les facteurs qui favorisent l'utilisation de la formation ou ceux qui y font obstacle. Après un mois, un taux de mise en application de l'apprentissage au travail de 80 % a été relevé, suivi d'un taux surprenant de 64 % six mois après la formation. À la lumière des études actuelles qui font état d'un taux de mise en application de l'apprentissage de 62 % aussitôt après la formation et d'une diminution de 44 % après six mois (Saks & Belcourt, 1997), on peut dire que les résultats de l'étude sont encourageants.

D'un participant du secteur de la vente au détail :

> « Lorsque l'apprentissage est aussi intensif que cela au point de vue de la mise en application et que vous avez votre propre réseau de collègues qui soutient vos objectifs, vous devenez vraiment déterminé à faire de vos objectifs une réalité. »

D'après les stagiaires, ces résultats sont dus à la synthèse du plan axé sur la mise en application et de la prestation des activités de formation, de même qu'aux réunions sur la stratégie du travail en équipes, qui ont canalisé l'apprentissage dans des contextes organisationnels précis. L'orientation axée sur la mise en application étant ancrée dans les trois étapes de la formation (avant, pendant et après), les stagiaires ont sans cesse réfléchi aux plans d'action et discuté de ces derniers en ayant pour optique leur pertinence pour l'organisation. La formation axée principalement sur les éléments nécessaires pour transformer la théorie en pratique a créé un milieu d'apprentissage qui correspondait parfaitement bien aux stagiaires, et ces derniers, de ce fait, ont été plus enclins à canaliser leur énergie et leur apprentissage en posant des gestes concrets.

Les résultats sous l'angle qualitatif

Collaboration de l'équipe au cours de la formation

Les participants ont apprécié la collaboration de l'équipe pendant toute la formation. D'après leur expérience antérieure, la fixation d'objectifs et l'élaboration de plans d'action étaient habituellement réservées à la fin de la formation, une fois que le contenu avait été entièrement diffusé. Cela ne laissait pas assez de temps pour procéder aux recherches approfondies qui sont nécessaires pour dresser des plans significatifs et applicables. La diminution de l'énergie et de l'attention que l'on note à mesure que la formation tire à sa fin – et, chez certains stagiaires, la préoccupation que suscitaient les tâches qui les attendaient par la suite – signifiaient que le travail d'assimiler le contenu en vue de mettre le doigt sur des initiatives de changement bien précises était difficile et mal exécuté au cours des dernières étapes de la formation.

Dans la présente étude, les réunions tenues en cours de formation ont permis aux stagiaires de se concentrer sur chaque module d'apprentissage et de déterminer de quelle façon le nouveau contenu correspondait à leurs objectifs. Grâce à l'accent mis après chaque module sur le processus de mise en application, les stagiaires ont réintégré leur lieu de travail en étant confiants de disposer de « cartes routières » aptes à être mises en pratique pour entreprendre des changements.

Collaboration de l'équipe après la formation : maintien de l'élan acquis et de l'engagement

L'extension de la collaboration de l'équipe au monde du travail des stagiaires a été citée comme une force agissante qui incite ces derniers à agir et à maintenir l'élan acquis. Ayant « voyagé » ensemble depuis le début de la formation, et connaissant l'histoire de chacun et le contexte dans lequel il travaille, les équipes sont devenues le principal système de soutien pour ce qui est de transférer l'apprentissage et d'atteindre l'objectif fixé. La collaboration a permis d'acquérir la confiance nécessaire pour appuyer les stratégies d'élaboration d'objectifs, pour être davantage responsable de la suite donnée aux plans proposés et pour atteindre avec succès les objectifs fixés.

Les stagiaires sont restés concentrés sur leurs objectifs, confiants que l'équipe serait disponible pour leur apporter la direction, le soutien et le renforcement nécessaires. Le fait de savoir que les membres de l'équipe se réuniraient pour parler des stratégies que l'équipe avait elle-même créées a fait en sorte que les objectifs sont demeurés constants, et a aidé les stagiaires à suivre la voie tracée. Grâce à ce processus, les équipes ont vécu les complexités de la transition entre la théorie et la mise en application et elles ont élargi leur répertoire de pratiques exemplaires, relativement aux stratégies d'élaboration de mise en œuvre et de gestion d'objectifs. En fin de compte, l'équipe a été responsable d'une transition relativement harmonieuse entre la salle de classe et le lieu de travail.

Il y a eu quelques obstacles lors du processus de transfert :

- des difficultés à planifier les réunions postérieures à la formation;
- l'obligation de limiter les réunions aux moments convenus;
- le fait de dissuader des membres des équipes de dominer les discussions;
- le fait de rester concentré sur la réalité du lieu de travail plutôt que se complaire dans l'idéalisme;
- le fait de confronter les obstacles organisationnels avec une foule de suggestions creuses.

Dans le cadre de la conception de la formation, un encadrement en matière d'auto-gestion d'équipe a été assuré afin de réduire le plus possible le risque de se heurter à de telles difficultés.

Les équipes en tant que « sauveteurs »

Les stagiaires ont mis l'accent sur l'importance de la « ligne de sauvetage » que les collègues ont déroulée pendant la période de collaboration. En raison de leur expérience antérieure, la formulation d'objectifs et l'exécution des tâches connexes étaient une quête individuelle et isolée, que venaient souvent compliquer des demandes organisationnelles contradictoires et urgentes. La présence de personnalités et de comportements divergents en milieu de travail menaçaient la réalisation des objectifs. À mesure que les obstacles organisationnels remontaient à la surface et faisaient obstacle à leurs initiatives, la motivation des stagiaires diminuait souvent et, ces derniers, par frustration, mettaient de côté leurs objectifs et revenaient à leurs anciennes habitudes.

Dans le cadre de la présente étude, les stagiaires – non mêlés directement aux difficultés quotidiennes que vivaient les membres de leur équipe – ont été en mesure d'offrir des perspectives et des solutions entièrement nouvelles pour s'attaquer à la réalisation des objectifs, souvent avec grande précision. De nombreux stagiaires ont été sauvés par les membres de leur équipe; ils ont pu s'en tenir aux objectifs qui avaient été proposés au départ, plutôt qu'à des initiatives plus faciles à gérer. Les stagiaires ont confirmé que leurs collègues avaient contribué à les doter de la sagesse et de la compétence voulues pour surmonter les obstacles avec efficience, efficacité et confiance – et ce, plus rapidement que s'ils avaient recouru à leurs propres ressources.

Amélioration de la responsabilisation stratégique

Le fait de participer au transfert d'apprentissage axé sur des objectifs a permis aux stagiaires de mieux comprendre l'importance d'aligner les objectifs sur la vision et la stratégie de l'organisation, de même que le processus à suivre à cette fin. Pour un grand nombre d'entre eux, le mandat stratégique de l'organisation avait la réputation d'être illusoire, et n'indiquait pas de façon claire comment vivre la vision de l'organisation. Maintenant, les stagiaires pouvaient fixer des objectifs, tracer des voies à suivre et définir des résultats mesurables qui pouvaient contribuer aux objectifs de l'unité et de l'organisation. Le rôle qu'ils jouaient pour donner vie à la stratégie a mené à plus de responsabilisation et d'habilitation.

Fait surprenant, les stagiaires ont commencé à internaliser cet accent mis sur les objectifs. Ils se sont intéressés de plus en plus à la manière dont les organisations mettent leur vision en action, ainsi qu'à la façon d'y répondre grâce à leurs propres efforts. Ils sont devenus de plus en plus sensibles à la responsabilité qu'ont les employés de façonner l'orientation organisationnelle. Certains d'entre eux ont mis cela en action en engageant un dialogue avec leurs superviseurs afin de proposer de meilleurs moyens de communiquer pour faire connaître la stratégie dans toute l'organisation et susciter ainsi un engagement généralisé.

Intégration aux évaluations du rendement un processus axé sur les objectifs

Les superviseurs ont indiqué que grâce aux recherches soutenant le RI attribuable au transfert d'apprentissage axé sur des objectifs, des plans avaient été établis en vue d'uniformiser les critères de réalisation des objectifs pour les évaluations du

Modèle de transfert d'apprentissage fondé sur le travail en équipes : résultats et répercussions pour la pratique

rendement. Le but visé est de souligner la responsabilisation stratégique de la formation et d'éliminer les présomptions selon lesquelles la formation peut être dispensée dans un vide dénué de toute discussion stratégique. Les plans comprennent également l'introduction de procédures préalables à la formation qui obligent les employés à proposer des énoncés d'objectifs avant que des activités de formation ne soient autorisées et financées. De cette façon, il est possible de mettre à l'essai la valeur potentielle de la formation pour ce qui est de fournir des résultats fondés sur la pertinence organisationnelle, ce qui ajoute une couche de confiance additionnelle lorsque l'on dégage des fonds pour les activités de formation.

Établissement de réseaux professionnels

Dans bien des cas, les équipes ont noué des liens de respect professionnel et d'amitié qui ont dépassé les attentes de l'étude. Unies au départ par une fin commune, les équipes ont persévéré malgré l'adversité et ont fini par célébrer leur succès ensemble.

Les liens des équipes ont également contribué aux analyses contextuelles – suivre l'évolution des tendances et des priorités dans un paysage complexe en mutation constante. L'hétérogénéité de ces équipes a favorisé la création d'un riche milieu, propice à l'échange d'informations, et surtout de pratiques exemplaires sectorielles. En outre, le réseau a permis de conclure des partenariats au sujet d'autres initiatives professionnelles et de donner accès à des ressources telles que des orientations professionnelles.

Répercussions pour la pratique

Un aspect ancré dans de nombreuses infrastructures organisationnelles est le détachement qu'il y a entre l'orientation stratégique et la participation des employés. On a souvent l'impression que la stratégie est l'apanage de la direction, et que les employés se tiennent en retrait, attendant de voir ce qu'il adviendra de l'initiative stratégique. Le modèle de formation dont il est question ici peut aider à faire passer les employés de l'inertie stratégique à la participation; ce sont eux qui fixent les objectifs et les plans d'action qui personnalisent leur contribution à la stratégie. Le fait d'intégrer le modèle à la formation pourrait faire passer les employés d'un système exclusif d'acquisition de contenu à un système centré sur l'application de l'apprentissage afin de correspondre à l'impératif stratégique de l'organisation. Si cette pratique se généralise, elle pourrait mener à une contribution organisationnelle globale à l'établissement de réponses bien précises à l'orientation stratégique. Selon Montesino (2002), le transfert de la formation est plus efficace chez les stagiaires qui perçoivent qu'il y a un lien important entre la formation et la vision stratégique de l'organisation.

Conclusion

Si nous décidons de ne pas réagir à l'écart qui se maintient entre l'apprentissage théorique et la mise en application, nous risquons de continuer à dépenser des ressources précieuses pour des activités de formation qui ne mèneront pas forcément à des changements en milieu de travail. Le fait de ne pas disposer d'un mécanisme efficace pour transformer la théorie en pratique risque de perpétuer les idées et les comportements anciens qui nuisent à l'efficacité et à l'efficience d'un organisation dans un paysage de changement global.

Le modèle présenté dans cette étude offre aux praticiens de la formation une approche nouvelle qu'il est possible d'intégrer à leurs plans de formation de façon à combler l'écart entre l'apprentissage et la pratique, et à favoriser le dialogue entre les praticiens au sujet des mécanismes optimaux de transfert de l'apprentissage. À la longue, ce transfert pourrait devenir une pratique courante, qui prendrait la place qui lui revient en tant qu'élément aussi important – sinon plus – que les autres éléments de l'architecture de la formation. Lorsque le transfert de l'apprentissage occupera une place centrale dans l'évolution de normes et de pratiques de base progressives en matière de formation, les praticiens seront en mesure de réagir avec plus d'efficience et d'efficacité ainsi que de jouer un rôle de chef de file dans une ère de changement perpétuel.

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8:00 – 8:45 a.m.	**Registration and Breakfast**
8:45 – 9:00 a.m.	**Welcome and Morning Remarks**
9:00 – 10:00 a.m.	**Keynote Address**

Measurement at Cirque du Soleil: Leadership from Engagement to Deployment to Outcomes

FRANCE DUFRESNE, Cirque du Soleil Inc.

SYLVIE GENEAU, Cirque du Soleil Inc.

Note: simultaneous interpretation will be available for this session

Faced with the complexity of running a fast growing global business with many widely dispersed locations and a highly mobile workforce, leadership becomes the decisive factor in determining an organization's success. This session will review how the leadership experience at Cirque du Soleil was deployed in three acts: building on the roots of their success; developing themselves for the future; being and acting as a leader-manager. In this session, you will learn how the context, culture and business goals of an organization should be tied to leadership development. You will also learn the various facets of measurement that allow the organization to assess the outcomes of such an initiative and prepare for the next learning requirements.

10:00 – 10:30 a.m.	**Coffee Break: Network!**	
10:30 a.m. – 12:00 p.m.	**Concurrent Sessions**	**A1 — A4**

A1 Creating a Learning and Development Strategy Map: a Dofasco case study

TRACY MACPHERSON, Dofasco

THERESA O'HALLORAN, Dofasco

A2 Requirements for Effective Assessment Instruments

NICOLE BENDALY, Kinect

A3 Using Teams to More Effectively Assess Learning in Instructional Skills Workshop

JEAN-MARC GUILLEMETTE, LearnPlex

Note: this session will be delivered in French only

A4 Help! Looking for Transfer of Training

NATHALIE DORÉ, CTDP, Benjamin Moore

Note: this session will be delivered in French only

12:00 – 1:00 p.m.	**Delegate Lunch: Mingle with your Peers!**	
1:30 – 2:30 p.m.	**Concurrent Sessions**	**B1 — B4**

B1 Evaluating Informal Learning

SAUL CARLINER, CTDP, Concordia University

ADNAN QAYYUM, Concordia University

B2 Enhancing ROI of Training Through a Team-based Approach to Transfer of Learning

CAROLIN REKAR MUNRO, Durham College

B3 Smooth Navigation of a Conflict Management Pilot

NICOLE DUCHASTEL, JED New Media

CINDY HITSMAN, Victorian Order of Nurses (VON)

Note: this session will be delivered in French only

B4 Creating Competitive Advantage to your Organization through Training and Development

MARIE-FÉLICITÉ GIGNAC, Pfizer Canada Inc.

Note: this session will be delivered in French only

2:30 – 3:00 p.m.	**Break and refreshments**	
3:00 – 4:30 p.m.	**Concurrent Sessions**	**C1 – C4**

C1 Beyond ROI: Scorecarding your Organization

CHRISTY PETIT, Eagle's Flight

MICHELLE MANGLAL-LAN, Siemens

C2 Assessment of Knowledge: Test Items that Measure Learning Effectively

ATENA BISHKA, TD Bank Financial Group

C3 Bridging the Gap Between Educational and Business Evaluation Approaches

CLAUDE MARTEL, Educonsillium

Note: this session will be delivered in French only

C4 The Secrets of ROI Revealed: Measuring your Leadership Development Investment

JOCELYN BÉRARD, DDI

SYLVAIN BEAUSÉJOUR, AstraZeneca

Note: this session will be delivered in French only

4:30 – 6:00 p.m.	**Delegate Reception at the Club Mount Stephen**
6:00 – 8:00 p.m.	**Delegate Dinner at the Club Mount Stephen**

FRIDAY, MAY 4, 2007

8:45 – 8:55 a.m.	**Welcoming Remarks**
8:55 to 9:40 a.m.	**Keynote Address**

Connecting the Dots on Training ROI

ALLAN BAILEY, CEO of Learning Designs OnLine

Note: simultaneous interpretation will be available for this session

In this session, Allan Bailey, CEO of Learning Designs OnLine, will present the business case for training based on international and Canadian evidence on return on investment. He will discuss both the evidence itself as well as the practical steps which the Work and Learning Knowledge Centre of the Canadian Council on Learning is taking to share this evidence across the business community.

9:40 – 10:00 a.m.	**Coffee Break: Network!**	
10:00 a.m. – 12:30 p.m.	**Concurrent Workshops**	**W1 — W2**

W1 Evaluation of Learning – Just Do It!

HAFSA EL KHETTAB, ARINSO Canada Inc.

FRANÇOIS STE-MARIE, ARINSO Canada Inc.

This workshop will be delivered in French only.

W2 From Black Board to PC's: The Unforeseen Results of a Massive eLearning Transformation

MÉLANIE SISLEY, Technomedia Training Inc.

This workshop will be delivered in English only.

12:30 – 4:30 p.m.	**Lunch and Site Visit at Cirque du Soleil Inc.**

Representatives of Cirque du Soleil will provide an onsite presentation demonstrating the company as a socially responsible citizen and an agent of change through its various social and cultural action programs, and as a driving force of renewal in the performing arts industry through its innovative and state-of-the-art training studios and workshops.

Transportation provided

Register Now!

www.cstd.ca

- Keynote session delivered in English with simultaneous interpretation
- Session delivered in English
- Session delivered in French

Programme du Symposium National de la CSTD

L'évaluation et la mesure....

Comment savoir si vos activités d'apprentissage répondent aux besoins organisationnel.

LE JEUDI 3 MAI 2007

Institut international de formation des cadres de McGill, Montréal, Québec

8h00 – 8h45	Inscription et petit déjeuner
8h45 – 9h00	Bienvenue et remarques matinale
9h00 – 10h00	Allocution d'honneur

La mesure des activités au Cirque du Soleil – Engagement, déploiement, résultats

CIRQUE DU SOLEIL.

FRANCE DUFRESNE, Cirque du Soleil Inc.

SYLVIE GENEAU, Cirque du Soleil Inc.

L'interprétation simultanée sera disponible pour cette séance

Confronté à la complexité de gérer une entreprise mondiale qui croît rapidement, qui est implantée en de nombreux endroits largement dispersés et dont l'effectif est fort mobile, le leadership devient le facteur décisif dans le succès d'une organisation. Après 2 années de déploiement, l'expérience de leadership au Cirque du Soleil est prometteuse. L'initiative a été précédé d'une année de réflexion et d'analyse au sujet des besoins uniques de l'organisation, suivie d'une année d'engagement, essentielle au succès de l'approche et de sa mise en œuvre. Cette session montera comment l'initiative s'est déroulée en trois actes : bâtir sur les fondements du succès, perfectionner les employés en prévision de l'avenir, être un leader-gestionnaire et agir en tant que tel.

10h00 – 10h30	Pause-café	
10h30 – 12h00	Séances simultanées	A1 — A4

A1 Création d'une carte de stratégies d'apprentissage et de perfectionnement – étude de cas Dofasco

TRACY MACPHERSON, Dofasco

THERESA O'HALLORAN, Dofasco

Séance sera présenté en anglais seulement.

A2 Exigences en matière d'instruments d'évaluation efficaces

NICOLE BENDALY, Kinect

Séance sera présenté en anglais seulement.

A3 Utilisation d'équipes pour évaluer plus efficacement l'apprentissage dans le cadre d'un atelier sure les technique d'enseignement

JEAN-MARC GUILLEMETTE, LearnPlex

A4 Avis de recherche : le transfert des apprentissages

NATHALIE DORÉ, CTDP, Benjamin Moore

12h00 – 13h00	Midi des délégués: socialisez avec vos pairs!	
13h00 – 14h30	Séances simultanées	B1 — B4

B1 Évaluation de l'apprentissage informel

SAUL CARLINER, CTDP, Concordia University

ADNAN QAYYUM, Concordia University

Séance sera présenté en anglais seulement.

B2 Amélioration du RI de la formation en recourant à une approche axée sure le travail d'équipe pour transférer l'apprentissage

CAROLIN REKAR MUNRO, Munro, Durham College

Séance sera présenté en anglais seulement.

B3 Navigation efficace d'un projet-pilote de gestion de conflit

NICOLE DUCHASTEL, JED NEW MEDIA

CINDY HITSMAN, VICTORIAN ORDER OF NURSES (VON)

B4 Créer un avantage compétitif par la formation

MARIE-FÉLICITÉ GIGNAC, Pfizer Canada Inc.

14h30 – 15h00	Pause café	
15h00 – 16h30	Séances simultanées	C1 – C4

C1 Au-delà du RI: évaluation de votre organisation (tableau de bord)

CHRISTY PETIT, Eagle's Flight

MICHELLE MANGLAL-LAN, Siemens

Séance sera présenté en anglais seulement.

C2 Évaluation des connaissances: des éléments de test qui mesurent efficacement l'apprentissage

ATENA BISHKA, TD Bank Financial Group

Séance sera présenté en anglais seulement.

C3 Combler l'écart entre les méthodes d'évaluation de l'enseignement et des affaires

CLAUDE MARTEL, Educonsillium

C4 La révélation des secrets du RI : évaluer votre investissement en développement du leadership

JOCELYN BÉRARD, DDI

Sylvain Beauséjour, AstraZeneca

16h30 – 18h00	Réception des délégués au Club Mount Stephen
18h00 – 20h00	Dîner des délégués au Club Mount Stephen

LE VENDREDI 4 MAI 2007

8h45 – 8h55	Bienvenue et remarques matinales
8h55 – 9h40	Allocution d'honneur

Rendement des investissements (RI) faits en matière de formation

ALLAN BAILEY, CEO of Learning Designs OnLine

L'interprétation simultanée sera disponible pour cette séance

9h40 – 10h00	Pause-café	
10h00 – 12h30	Ateliers simultanées	W1 — W2

W1 Évaluation de l'apprentissage – Faites-le!

HAFSA EL KHETTAB, ARINSO Canada Inc.

FRANÇOIS STE-MARIE, ARINSO Canada Inc.

Séance sera présenté en français seulement

W2 Des résultats insoupçonnés grâce à l'implantation du eLearning

MÉLANIE SISLEY, Technomedia Training Inc.

Séance sera présenté en anglais seulement.

L'atelier sera présenté en anglais. Les animateurs répondront aux questions en anglais ou en français, et tous les documents utilisés dans le cadre de l'atelier seront disponibles dans ces deux langues.

12h30 – 16h30	Déjeuner et visite au Cirque du Soleil Inc.

Des représentants du Cirque du Soleil présenteront sur place un exposé illustrant le rôle que joue cette entreprise à titre, d'une part, de citoyen socialement responsable et d'agent de changement grâce à ses divers programmes d'action sociale et culturelle, et, d'autre part, de moteur de renouvellement dans l'industrie des arts de la scène grâce à ses ateliers et à ses studios de formation novateurs et ultramodernes.

CIRQUE DU SOLEIL.

Transport fournit.

Inscrivez-vous dès aujourd'hui!

www.cstd.ca

- Allocution d'honneur sera présenté en anglais avec l'interprétation simultanée
- Séance sera présenté en français
- Séance sera présenté en anglais

2007 CSTD National Symposium Program

The CSTD Quebec chapter is delighted to host the 3rd annual CSTD national symposium "Assessment, Measurement and Evaluation…How to Know if Learning is Meeting Business Needs". From the dedication of those involved with the Quebec Chapter alongside the support of the CSTD board of directors and staff, we are excited to deliver a national platform to discuss the evolving nature of learning and performance's role in meeting business and strategic objectives.

The symposium will take place in the heart of Montreal at the McGill International Executive Institute on May 3 - 4. Get ready for Montreal! You're about to experience a city whose passion, joie de vivre and rich cultural heritage are legendary. Montrealers love to greet visitors and show off their city's charms, so expect a very warm welcome. It's like a taste of Europe right in North America. Fuel your professional creativity by sampling Montreal's inspiring cultural scene.

The symposium will feature bilingual presentations covering critical measurement and evaluation topics through practical case studies and sharing of best practices. These topics include assessment tools, teams, transfer of training, evaluation of informal learning, enhancing ROI and conflict management. This symposium is an excellent opportunity for workplace learning and performance professionals to gain new knowledge and to network. Return to your organization better prepared to advance the benefits of workplace learning! CSTD has a proven track record of producing professional content-rich programs so don't miss out, register today!

Inscrivez-vous dès aujourd'hui!

Pour de plus amples information et pour vous enregistrez enligne, visitez www.cstd.ca/fr/symposium_fr

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Register Today!

Visit www.cstd.ca/symposium for more information and to register online.

Christ Church Cathedral and Place de la Cathédrale building

Montréal skyline viewed from the parc Jean-Drapeau

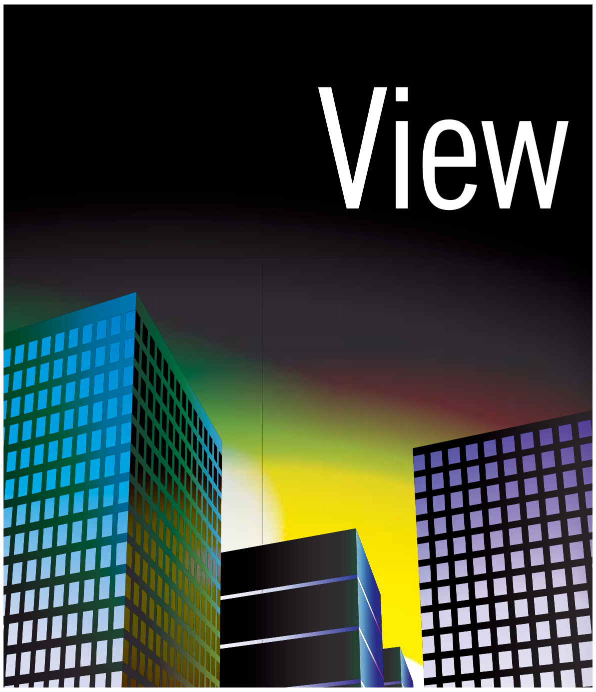
Programme du Symposium National de la CSTD

La section québécoise est fière d'être cette année l'hôte du troisième symposium national « L'évaluation et la mesure… comment savoir si vos activités d'apprentissage répondent aux besoins organisationnel» qui, pour la première fois, sera complètement bilingue.

Le symposium se tiendra au cœur de Montréal, à l'Institut international de formation des cadres de McGill, les 3 et 4 mai. Vous séjournerez dans une ville dont la passion, la joie de vivre et la richesse de son patrimoine culturel sont légendaires. Les Montréalais adorent recevoir des visiteurs et faire étalage des charmes de leur ville; attendez-vous donc à un accueil très chaleureux. Vous aurez l'impression d'être en Europe, mais sans quitter l'Amérique du Nord. Stimulez votre créativité professionnelle en goûtant aux plaisirs culturels de Montréal.

Joignez-vous à nous pour des exposés bilingues portant sur des sujets importants en matière de mesure et d'évaluation, dans le cadre d'études de cas pratiques et de l'échange de pratiques exemplaires. Ces sujets incluent les éléments suivant : outils d'évaluation, équipes, transfert d'activités de formation, évaluation des programmes d'apprentissage informel, amélioration du rendement des investissements (RI) et gestion des conflits.

Le symposium offre aux professionnels de l'apprentissage et du rendement en milieu de travail une excellente occasion d'acquérir de nouvelles connaissances et d'étendre leurs réseaux. Vous serez ensuite mieux préparés à promouvoir les avantages de l'apprentissage en milieu de travail !



View from the Top

An interview with Nick van Dam, PhD, Global Chief Learning Officer, Deloitte Touche Tohmatsu

Lee Weisser, MEd, principal of Lee Weisser Communications and co-editor of the Canadian Learning Journal, *interviewed Nick van Dam about learning and development in a global context.*

Nick van Dam is an internationally recognized consultant and thought leader in learning and human resources development. He has written articles and has been quoted by The Financial Times, Fortune Magazine, Business Week, Management Consulting, Learning & Training Innovations Magazine, T+D Magazine, Bizz Magazine, and The India Times. He is a columnist for CLO Magazine (US) and Intellectueel Kapitaal Magazine (The Netherlands). He has authored and co-authored a number of books including: Organisation & Management, an international approach (1991-2007 Dutch and English); Business Simulations-Topsim Series (1995); Change Compass (2001); The e-Learning Fieldbook (2003) and (2006 - Mandarin Edition) and The Business Impact of e-Learning (2005).

Dr. van Dam holds several advisory board positions including The International Consortium for Executive Development and Research (ICEDR), in Lexington, Massachusetts. ICEDR is a global learning alliance of 40 of the world's leading companies and 25 premier business schools. He is also a visiting Professor at Villanova University in Pennsylvania.

CLJ: *What is the biggest challenge in your current role as Global Chief Learning Officer at Deloitte?*

van Dam: Our biggest challenge relates to the growth of the business. Within Deloitte we have more than 135,000 people globally. We expect that in five years we will have between 200,000 and 250,000 people. That growth alone requires us to develop a lot of people. In addition, we have annual turnover—people are leaving Deloitte, and we have to replace them—so that requires a lot of training.

And at the same level of priority, Deloitte—like any professional services organization— is in the ultimate intellectual capital business. We do not have products; what we sell is our intellectual capital, best practices, the knowledge of our people who are serving our clients. Our clients are willing to pay for our people if they have the best in class knowledge and skills to help them. So, our challenge relates to the challenges that we are all facing in the future in the war for talent.

If you look at workforce demographics on a global basis, about 75 million people are getting ready for retirement in Europe and the US. Forty percent are in senior management roles, so there will be fewer people to recruit from in the future; the pool will get smaller. If you look at the skills that people need, most of the skills in the 21st century are skills that are captured by only 20% of the current workforce. That requires companies, including ourselves, to continue to upgrade people's skills and to support them in learning new things.

It's all related to the talent agenda, to growth and to workforce demographics. There's a whole new generation moving into the workforce, the Internet generation, born after 1981—the kids that have grown up with computers and the Internet—who learn very differently. They learn in teams, they use technology for everything; they're used to collaborative learning. As a result, organizations need to provide a number of different ways they will educate, train and develop these folks.

Of course, other things relate to globalization. At Deloitte we have people in 150 countries and we are experiencing significant growth in parts of Asia (India and China), fast growth in parts of Europe (Russia), and in South America (Brazil). Fast growth in a number of countries where we have been relatively small, requires us to do a lot of training, with challenges in the areas of diversity and language skills. We're not bored!

CLJ: *With this vast global presence, how do you maintain the common values that are so important to Deloitte, and at the same time take advantage of the diversity of your employees?*

van Dam: In terms of values within the firm, we address it not just by learning or training programs, although they play an important role, of course. We have defined shared values for our people and they are enforced in orientation programs in all the member firms around the world. We are also reinforcing these values in a whole portfolio of leadership programs that we offer in our regions. We have programs we deliver on a global basis, for example, our New Partner Program which is scheduled each year in a different location. In October 2006 it was in Buenos Aires and we flew all new partners there from 150 countries. We bring in people from all around the world, give them an opportunity to network, to leverage their strength and diversity, and we also reinforce the things that will keep us together as a firm and talk about our values and our commitment to each other, such as ethical principles of doing business. It is a thread in all our programs. And in the local country practices, the values and shared beliefs are reinforced to our people.

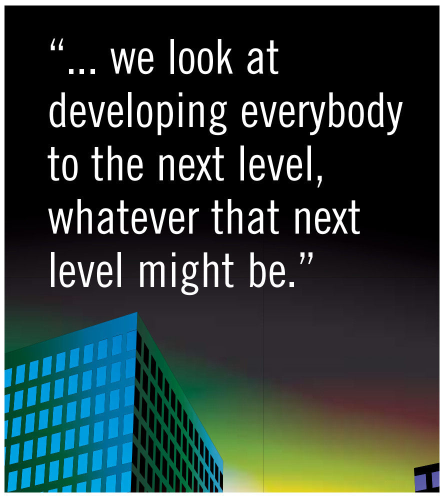
If you attract people with diverse backgrounds, you make the workforce a richer place to be. It reflects the world we are living in and the diverse clients we are working with. From an international perspective, we are serving a large number of Fortune clients. They expect us to help them on global engagements. For example, we do audit for Microsoft in the US, but it's a global audit. So the clients expect us to have people around the world who can help them no matter where they are and who they can connect with on a country basis in a way that is satisfactory for them.

We are hiring people from so many countries to work for Deloitte. We are getting a more and more diverse background in our workforce and we believe it's a good thing. It also relates to the talent agenda, the challenges in sourcing and finding talent. Our approach is that we don't mind where people are or where they're coming from—we want to find the best. If they are in India, we hire the people in India. If they are in China, we hire the people in China.

CLJ: *How do you measure the effectiveness of the consistency?*

van Dam: For country-specific programs, if they relate to the values of the firm, we have an annual HR practice review. We audit what we are doing from an HR and learning perspective in all the countries where we do business. When we do an HR audit, we look at a number of standards we have developed including the number of learning hours we provide and the quality of the courseware. We review these and feedback is provided to our leadership.

We also have implemented our Global People Commitment Survey that we send out annually to almost all of our people. We ask the same questions in a number of different areas related to leadership, the firm, and people's careers, and a number of questions about learning, questions about what we can do to make this a better place for people to work. It's a very extensive survey or diagnostic. We have a response rate of 79%, which is extremely high. We get feedback on what we do from a talent development and learning perspective. The commitment that we give our people is that once they have completed the survey, we'll get back to them with the results and the topics addressed with the highest priority. We will take action and put together a task force and work on a number of things that we can do to enhance what we have in place or address people's concerns or dissatisfaction. Because of our commitment to do that, the response rate is high.



CLJ: *How do you identify those individuals who show potential for global leadership and how do you develop these people?*

van Dam: If you look at a typical corporate organization, when they look at talent development they are talking about the top 10% of the employee population. In a professional services firm, we look at developing everybody to the next level, whatever that next level might be. So there's a strong focus on overall development of people. We start with that.

For the top leadership of the firm, the people who will over time take on the most significant 500 functions in the global sphere or the largest country functions, we have processes in place whereby we identify talent—people who do broad things very well. We also have criteria where we say, for example, if you want to move into a global role, we expect you to have had a number of experiences in your career—a lead client service partner, industry leader, work abroad—a number of criteria to look at the capabilities and competencies in a specific role. From there, it's a matter of assessing the pool of people we have and providing people with development opportunities that will help them to get to that point. And then of course there's input into their performance from a number of people around them. There's also a process in place to identify the potentials, the people who can play those roles.

This year we will launch something new for Deloitte, the Deloitte Development Centre. It's a program for people who will potentially succeed the top 500 most significant roles within Deloitte or the Deloitte member firms. The people who participate have been identified within our succession process to potentially play a significant role in the future. These are people who are already playing a significant role. They will go through a development experience that includes an action learning program. Then they are assigned an executive coach who will help them. We will look at the experiences they need to go to the next level, and put in place a number of components to accelerate the development of those people.

CLJ: *How do you measure the results of the member firms' learning and development programs and keep the firms on track with your global strategy and business objectives?*

van Dam: In terms of overall measurement, we use the metrics from Kirkpatrick and Phillips. Do people like what they do? Have they learned something? Can they apply their knowledge? In our situation, it's pretty obvious if people have the skills and the knowledge they need in order to do their job. We look at the utilization rate of our people. For example, if we had a mismatch for the resources or skills needed versus what we have within the firm, it would result in a number of people on the bench who cannot get assigned. From that perspective there's a direct relationship to our product development for the right clients.

In addition, we ask our people in the survey about the effectiveness of our learning programs, what we can improve to develop their skills or enhance their knowledge. And of course we have exit interviews that include questions about development and if we could have done a better job. So we are getting results from a number of different angles—during the course of a program, a formal evaluation at the end, we have our survey, we look at if people are billable and they can apply their skills, and get feedback from people who are leaving the firm, and we also ask them questions when they are joining the firm.

And, we have a competency framework in place. At the end of the year we look at the skills that people have. Managers discuss with them the next step in their career and how they can get there. For all people, we update their development plan on an annual basis—what kind of skills do they need to develop over the next 12 months, what kind of courses do they need to take to address possible deficiencies in their skill set, and what kind of experience will they need to get ready to move to the next level in the firm? That's part of our overall performance management process.

CLJ: *In such a large firm and when everyone is so busy, how do you make sure these performance reviews get implemented?*
van Dam: The people who conduct these reviews are also measured on the implementation. At the end of each year we have to give people a performance rating which will be discussed in teams. We compare people and look at who are the top performers.

Traditionally, professional services looked at how we compete with other similar firms, but now we compete with the world for talent. Someone could work for Deloitte, or Microsoft or Google or JP Morgan—people have a number of organizations they might consider joining. We compete with a lot of organizations for talent, not just the other large professional services firms.

CLJ: *How do you think CEOs perceive the value of workplace learning— do they understand how learning contributes to profitability and other key business measurements?*
van Dam: Yes. If you look at the challenges a lot of organizations will face moving forward, particularly related to retention or replacement or succession of their management, there will be more and more focus on development. Research from Towers Perrin looked at drivers for employee engagement globally. Number one is the opportunity to develop and learn new skills. Number two is improvement of employee capabilities and skills over the previous year.

These are the challenges for CEOs:
1) Talent and succession. If you globalize more—and most organizations will do that —then you require people with international experience. There are not enough of those people around.
2) Changes in technology. The life cycles of products are getting shorter and shorter, so the need to innovate and have new

business models in place requires a workforce where people can innovate, learn new things, learn new skills, be very pro-active and market-oriented. As a result, I think there will be more and more emphasis on overall learning in organizations and it will be recognized by CEOs.

CLJ: *Your book* The e-Learning Fieldbook *(published in 2003), presents lessons learned by leading companies in executing enterprise-wide e-learning. What has changed in the e-learning environment since then that has created new challenges for the implementation and evaluation of successful e-learning programs?*
van Dam: Well, the book has been translated and modified for the Chinese market. In all of Asia there is a growing need for learning and development. E-learning is playing a much bigger role.

Overall, the trend toward technology-based learning keeps increasing. The ASTD results from 2006 show that an average of 40% of learning is delivered through online learning in the US. That's significant if we reflect on where we were in 1999.

If we look at e-learning, people define it very differently, depending on what they have used in the past. My definition of e-learning is much broader and includes a number of different learning solutions: self-paced e-learning, virtual classrooms, online collaboration, online performance support systems. People don't need to acquire *all* the knowledge in specific areas. For example, there's so much learning that has to take place on policies and procedures, business models, where to go to get approval for things, knowledge of applications. Is it the right thing to send people to a course or online e-learning course? Or, is it much better if people have an online support system where they look up things when they need them and can use the knowledge to perform their jobs? I believe that electronic performance support systems and process embedded learning are an important part of online learning.

Knowledge management is another solution, making information available over the Internet for people. Best practices, white papers, slide presentations, are also e-learning aids. When I look at learning solutions, there are a number of things we are offering our people. Formal learning interventions — solutions designed by learning professionals with learning objectives in mind and with specific goals to achieve — include classroom programs, online learning, mobile learning, competency assessments, reference ware for people, and well-designed on-the-job training. Executive coaching is getting more and more important as a learning intervention, asking: What are your objectives? How will you get started? How will it end? Who will be involved in this? What will be tackled?

Then we have workforce learning solutions that are not necessarily formally designed programs, but learning that will be made available for people in a different way. One is informal mentoring and feedback from colleagues or coaches, providing people with access to information repositories and communities of practice. They are growing and becoming very popular within Deloitte—networks where we connect people with experts in a number of areas and collaborative spaces where we can exchange information and people can work together, as well as process embedded learning. So there is a large

continued on page 24

Mapping Organizational Performance

Strategy maps illustrate the link between managerial vision and employee actions

By Tracy MacPherson and Theresa O'Halloran

A common saying in business is, "You can't manage what you can't measure." In the early 1990's Robert S. Kaplan and David P. Norton developed the 'balanced scorecard' (BSC), a performance measurement system that allows organizations to balance and report on both financial and non-financial measures. The four perspectives in the balance scorecard (financial, customer, business/internal process and learning and growth) provide feedback on the lead indicators of future financial performance. In 2001 Kaplan and Norton introduced a book called The Strategy-Focused Organization, in which they transformed their thinking to a strategic management system and introduced the concept of strategy maps.

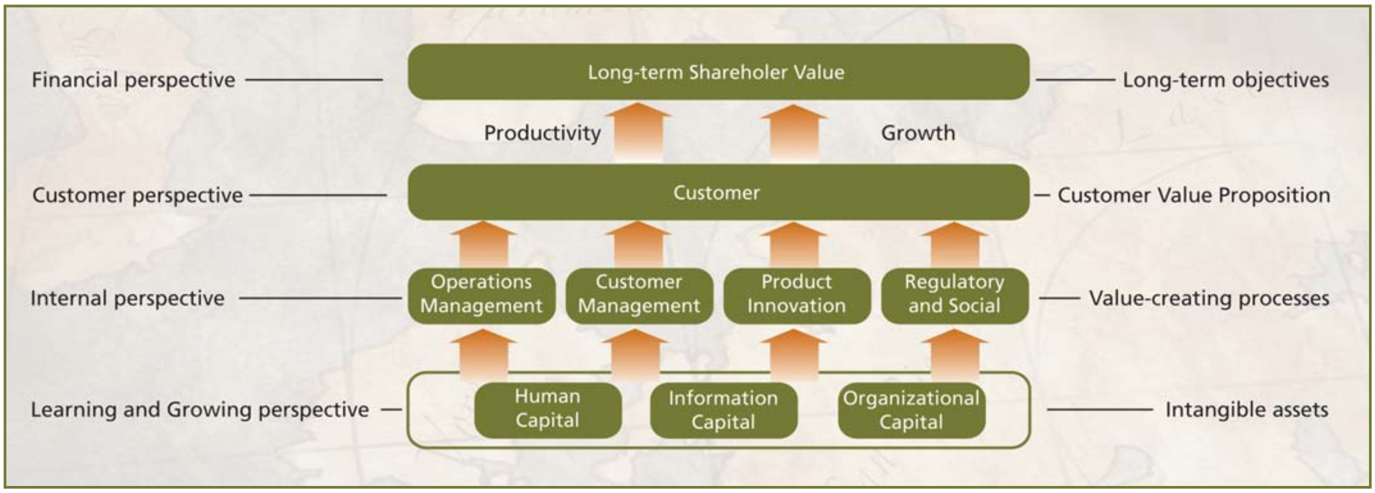
A strategy map is a visual representation that describes the cause and effect relationship among the four BSC perspectives. It provides a uniform and consistent way to describe strategy so that objectives and measures can be established and managed.

Conceptually, strategy maps link the high level goals of the organization—mission, vision and values—with meaningful, actionable steps each employee can take to support these. A well thought out strategy map provides strategic focus to key internal processes, helping organizations improve the right things and not just the obvious things.

The four perspectives that a strategy map must contain are:

Financial – describes how an organization intends to create sustainable growth in shareholder value. Here there needs to be a balance of short term objectives focused on cost reduction and productivity improvements, and long term objectives focused on profitable revenue growth.

Customer – defines the value proposition



for targeted customer segments. In practice there are four major value propositions:

- Lowest total cost to ownership
- Superior products and services
- Complete customer solutions
- System lock-in (making customer movement difficult).

Business/Internal Process – identifies the critical processes by which products and services are prepared and delivered to customers. They are clustered into four groups:

- Operations Management – producing and delivering products and services to customers. By focusing here, organizations are attempting to inject into their value proposition competitive prices, high levels of quality, speedy delivery of goods and a comprehensive solution to customer problems.
- Customer Management – establishing and leveraging relationships with customers. By focusing here, organizations are attempting to inject into their value proposition a stronger, more vibrant brand image, a win-win expanding customer relationship and increased levels of customer loyalty.
- Innovation – developing new products and services. By focusing here, organizations are attempting to inject into their value proposition enhanced functionality or high performance products, being the first to market with new features and benefits and extension of products into new, expanded markets.
- Regulatory and Social – complying with the law and building stronger communities. By focusing here, organizations are attempting to inject into their value proposition a sense of partnership with the community and an awareness of the need to be a good citizen.

Learning and Growth – improving intangible assets (people, technology and culture) to enable more added value for the future. These assets can be divided into three categories:

- Human Capital (people)

  Identifies the gaps between required skills and competencies and what the current workforce has. This information is used to set the agenda for human capital enhancement and development programs. Closing gaps increases an organization's human capital.
- Information Capital (what you know)

  The two key components typically identified here are:
  1. Technology infrastructure – hardware, software, communication networks and management expertise used in delivering and applying infrastructure
  2. Applications – transaction processing, management analytic tools, learning management systems, various databases, etc. that require information technology.
- Organizational Capital (how you operate)

  Key areas in this category include:
  1. Leadership – build leadership skills that are required in times of change and transition
  2. Corporate Culture – encourage behaviours and attitudes that an organization considers to be appropriate
  3. Alignment – create alignment to encourage risk taking, innovation and empowerment at the individual employee level
  4. Teamwork and Knowledge Sharing – encourage the sharing of knowledge across the organization.

The diagram above illustrates a simple strategy map. It provides a visual framework to demonstrate how strategy links intangible assets to value creating processes.

Strategy maps allow organizations to:

- Identify the key internal processes that drive strategic success
- Align investments in people, technology and organizational capital
- Identify and take early corrective action on gaps in strategy
- Clarify and communicate strategies to all employees.

Conclusion

Strategy maps help ensure an organization develops objectives in each of the four key BSC perspectives that are aligned and consistent. They help illustrate the cause-and-effect relationships that link the desired outcomes in financial and customer perspectives to excellent performance in the critical internal processes. They also identify the specific capabilities in the organization's intangible assets that are responsible for delivering exceptional performance in the critical internal processes.

For an in-depth look at how strategy maps can be used by workplace learning professionals, come to the ***CSTD National Symposium, May 3-4 in Montreal.***

Tracy MacPherson*, Learning & Development Specialist and* ***Theresa O'Halloran****, Manager, Development of Dofasco will be presenting the following session:* ***"Creating a Learning and Development Strategy Map: A Dofasco Case Study".***

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portfolio of learning solutions available now for our people, way beyond the classroom.

CLJ: *What do you see as the next big challenge facing workplace learning professionals in the year ahead?*

van Dam: Talent, globalization, growth in the number of employees, and providing people with meaningful development opportunities.

For learning professionals, we are going through a phase of change in how we deliver learning. We've got the classroom and e-learning, and now there will be more and more learning solutions available for people to acquire knowledge and develop their skills. I think that most organizations will go through a process in the next few years to better identify what kind of content can best be delivered by what learning method. To sort that out, it's an interesting, exciting but also challenging task to think about what we can deliver in the best way for the right audience. On a global basis, for a new generation in the workforce, but still having other generations working with them, that makes it a pretty interesting challenge.

e-Learning For Kids Foundation

Nick van Dam is founder and chairman of e-Learning for Kids Foundation, which is a global non-profit foundation (www.e-learningforkids.org) that provides schools and children around the world with free Internet-based courseware.

e-Learning for Kids is dedicated to fun and free learning on the Internet for children ages 5-12. Established in late 2004, our vision is to be the source for childhood learning on the Internet – available from anywhere and without charge. The Foundation offers best-in-class free courseware in math, science, reading, health and computers; and a community for parents and educators to share innovations and insights in childhood education.

Currently, more than 35 e-learning-related companies, associations and NGOs, and over 70 individuals are sponsors and supporters of the Foundation. In addition, an all-volunteer staff of education and e-learning experts and business professionals from around the world work tirelessly to make a difference for children with access to learning.

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programme d'agrément de la CSTD :

- fixer des normes de pratique professionnelle afin que les praticiens et les utilisateurs des services soient au courant de normes de rendement en matière de compétence et de comportement éthique;
- assurer les praticiens et les employeurs/clients, les apprenants et d'autres intervenants que les connaissances, les compétences et la pratique en matière de formation et de perfectionnement professionnel correspondent aux normes publiées;
- souligner la crédibilité, le respect et le statut professionnel du praticien agréé.

De nos jours, bien des organisations rivalisent entre elles pour embaucher les gens de talent dont elles ont besoin, et les professionnels compétents et avertis sont en grande demande. L'obtention du titre de CTDP ou de celui de *Certified Training Practitioner* (le niveau 1 pour le formateur/facilitateur professionnel) vous donne une longueur d'avance car ce titre démontre votre valeur aux yeux de tout employeur potentiel ou actuel.

Durant mes 25 années d'exercice au sein de notre profession, j'ai œuvré dans tous les aspects de l'apprentissage et du perfectionnement. J'ai rencontré de nombreux personnes talentueuses, et toutes m'ont appris quelque chose. Mais il y a une question que me vient aujourd'hui à l'esprit : pourquoi ces personnes n'ont-elles pas obtenu le titre de CTDP? Vous êtes sûrement nombreux à penser, comme moi, qu'elles sont trop occupées et n'ont pas le temps de suivre le programme.

Je suis fier de dire que j'ai acquis l'an dernier le titre de CTDP. Et j'ai bien de la difficulté à comprendre pourquoi il m'a fallu 60 ans avant de me décider à le faire.

Je vous encourage à vous joindre au nombre grandissant de membres de la CSTD qui ont pris la décision d'obtenir leur agrément. Je puis vous assurer que le temps et les efforts que cela requiert en valent la peine! Levez-vous que l'on vous reconnaisse!

Stan White, CTDP
Président du conseil

IN PRINT

Books for Business shares their list of the top 10 training books, based on sales from June to December 2006.

1. FACILITATION AT A GLANCE
by Ingrid Bens (Goal QPC, 1999) $14.95

2. THE TEAM HANDBOOK THIRD EDITION
by Peter Scholtes, Brian Joiner & Barbara Streibel (Oriel, 2003) $46.95

3. PERFECT PHRASES FOR PERFORMANCE REVIEWS
by Max Douglas (McGraw-Hill, 2002) $15.95

4. THE FIVE DYSFUNCTIONS OF A TEAM: A LEADERSHIP FABLE
by Patrick Lencioni (Jossey Bass, 2002) $29.99

5. FOR YOUR IMPROVEMENT: A GUIDE FOR DEVELOPMENT AND COACHING, FOURTH EDITION
by Michael Lombardo & Robert Eichinger (Lominger, 2004) $75.00

6. 1001 WAYS TO REWARD EMPLOYEES
by Bob Nelson (Workman, 2005) $16.95

7. BEYOND TRANSFER OF TRAINING: ENGAGING SYSTEMS TO IMPROVE PERFORMANCE
by Mary Broad (Pfeiffer, 2005) $64.99

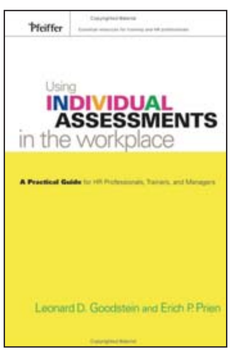
8. EVALUATING TRAINING PROGRAMS, THIRD EDITION
by Donald Kirkpatrick & James Kirkpatrick (Berrett Koehler, 2006) $49.95

9. FACILITATING WITH EASE!: CORE SKILLS FOR FACILITATORS, TEAM LEADERS AND MEMBERS, MANAGERS, CONSULTANTS, AND TRAINERS
by Ingrid Bens (Jossey Bass, 2005) $65.99

10. TELLING AIN'T TRAINING
by Harold Stolovitch & Erica Keeps (ASTD, 2002) $50.95

Book Review

Reviewed by Ajay M. Pangarkar, CTDP



USING INDIVIDUAL ASSESSMENTS IN THE WORKPLACE
By Leonard D. Goodstein and Erich P. Prien
Pfeiffer (2006)
$58.99
ISBN 9780787982560

Human capital and workplace performance are increasingly the focus in the growth and success of organizations today. Managers at all levels are being asked to make quick decisions on the capability and capacity of their employees and the employment of new individuals. Assessing employee knowledge, skills, and abilities was once the role of an HR department but now is the responsibility of all managers throughout the organization.

The so called 'gut' feeling or abbreviated interview can no longer be tolerated or accepted. This is the message of the recent book release, *Using Individual Assessments in the Workplace: A Practical Guide for HR Professionals, Trainers, and Managers*, by Leonard D. Goodstein and Erich P. Prien.

Specifically directed to HR and learning professionals, Goodstein and Prien deliver a concise and systematic explanation as to what is required in conducting a thorough assessment when hiring a potential employee or evaluating existing staff to ensure a job aligns with an employee's abilities.

When you begin reading this book you quickly get a sense of the importance of properly assessing individuals. Goodstein and Prien make direct links not only between job requirements and an individual's abilities but they are also able to connect the impact of an effective assessment process on an organization as a whole.

The book begins simply by walking us through the assessment process delivering complete explanations about various types of assessments and the role of the assessor. Many in the business world understand the importance of conducting assessments but do not necessarily follow through accordingly or are unaware of the different levels when conducting an assessment. According to the authors, most of us apply a basic level one employee assessment to every type of situation presented. In reality, Goodstein and Prien explain that as the knowledge, skills, and abilities increase in complexity so too does the need for assessors' education and experience requirements to also increase. This is a wake up call for many of us involved in working with and developing human

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Canadian Awards for Training Excellence

Submit your outstanding workplace learning product

Gain industry-wide recognition

The CSTD Canadian Awards for Training Excellence has honoured innovative, Canadian-developed learning products and programs since 1995. This program is open to all member organizations.

What's in it for you and your company?

Learning

- Validates that learning product used "best practice" learning principles
- Provides feedback outlining merits and areas for improvement

Recognition

- Canadian Award for Training Excellence from Canada's national association for workplace learning and performance practitioners
- Award plaques presented at the CSTD National Conference
- Enhances marketing through a profile in the Award ceremony booklet
- Enhanced program credibility with clients and peers
- Use of the winner logo (available in English and French)

What are the entry categories?

- **<NEW>** WOW Award
- External Learning
- Internal Learning
- External E-Learning
- Internal E-Learning

Submission Deadline: May 24th, 2007

Download Entry Form www.cstd.ca/awards

Watch the CSTD website for news on upcoming webinar for submitters

Questions, contact Charu Shankar, Manager, L&D, cshankar@cstd.ca or 1-866-257-4275, ext 29

Celebrating excellence in learning, innovation and performance

Prix canadiens d'excellence en formation

Reconnaissance, par l'industrie toute entière, d'un produit d'apprentissage en milieu de travail de qualité exceptionnelle

Les Prix canadiens d'excellence en formation que décerne la CSTD mettent à l'honneur depuis 1995 des produits et des programmes d'apprentissage d'origine canadienne et innovateurs. Ce programme s'adresse à tous les organismes membres.

Quelle en est l'utilité pour votre entreprise et pour vous-même?

Apprentissage

- Confirme que le produit d'apprentissage est fondé sur des principes d'apprentissage « optimaux ».
- Fournit une rétroaction faisant ressortir les mérites du produit et les points à améliorer.

Reconnaissance

- Un Prix canadien d'excellence en formation décerné par l'association nationale canadienne aux praticiens du rendement et de l'apprentissage en milieu de travail.
- Des plaques de mérite décernées à l'occasion de la Conférence nationale de la CSTD.
- Moyen d'amplifier la mise en marché du produit grâce à l'inclusion d'un profil dans le livret de la cérémonie de remise des prix.
- Crédibilité du programme rehaussée auprès des clients et des pairs.
- Utilisation du logo du lauréat (disponible en anglais et en français).

Quelles sont les catégories d'inscription?

- **<NOUVEAU>** Prix WOW
- Apprentissage externe
- Apprentissage interne
- Cyberapprentissage externe
- Cyberapprentissage interne

Date limite pour la présentation des propositions : 24 mai 2007

Formulaire d'inscription www.cstd.ca/awards

Consultez le site Web de la CSTD pour obtenir des nouvelles sur le prochain webinaire destiné aux proposants

Pour de plus ample informations veuillez contacter Charu Shankar, gestionnaire, apprentissage et perfectionnement, cshankar@cstd.ca ou 1-866-257-4275, poste 29

Célébration de l'excellence en matière d'apprentissage, d'innovation et de rendement

PROFILE: LOOK WHO'S CERTIFIED

Julie Braun is a Learning Specialist in the Human Resources Department at The Ottawa Hospital, is a member of CSTD, and has recently been awarded the CSTD ***Certified Training Practitioner Certificate.***

Julie is currently developing, designing and delivering leadership sessions for the Leadership Academy at The Ottawa Hospital, in collaboration with the Rotman School of Management of the University of Toronto and The University of Ottawa Executive MBA Program. She is a graduate in Adult Education from St. Francis Xavier University. For the past two years, she has held the role of Chair of idea (Inter-Agency Development and Education Association).

Congratulations to the distinguished 2006 graduating class of Certified Training & Development Professionals (CTDP)

For more information contact Debra Bellamy, Manager, Certification at 1-866-257-4275, ext 23

COMPETENCIES: WHAT ARE THEY?

Competencies are a cluster of behaviours, knowledge, understandings, attitudes, skills and values that are required for performing effectively in a particular area.

CSTD's Training Competency Architecture (TCA) and Toolkit define the training and development process in terms of the knowledge, understanding, skills and competencies required of workplace learning and development practitioners.

The TCA defines the five major competency categories as:

- analyzing performance/training needs
- designing training
- facilitating/instructing
- evaluating training
- coaching the application of training.

Each competency is broken down into the major tasks or roles within that category and the supporting activities or sequence of actions one must perform to demonstrate overall competency.

The TCA outlines the standard of competent performance, and the requirements that must be met in performance terms—key behaviours, outputs and quality criteria.

As a workplace learning and development practitioner striving to achieve excellence in your field, the TCA is a good place to start.

Using the TCA and Toolkit to self-assess your current knowledge, understanding and skills in the competencies needed to effectively perform in the workplace learning and development field, you can develop a personal learning plan for professional development.

CSTD uses the TCA as the standard against which workplace learning and development practitioners will be assessed for the purpose of **Certification**.

Certification is a professional designation for workplace learning and development practitioners who have met specific competency and experience requirements. The CTDP (Certified Training and Development Professional) designation is for those who qualify in all five competency areas. The Certified Training Practitioner (Tier One) is for those who qualify in the instructing/facilitating competency.

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capital—according to the book, we need to address employee assessments within one of the three appropriate levels.

In simple terms, the authors take us through a five-step model of the individual assessment process developed through their years of experience. The first step is to build an understanding of the "organizational and work setting in which the specific job will be performed." The authors clearly state that this includes not just having a job description but to be conscious of the culture and the intangibles of the work environment, specifically stating, "failure to build understanding of such factors…will diminish the quality and usefulness of the…assessment." The second step is the "job and person analysis." This step is very familiar to learning professionals when designing and developing training initiatives. Although this is considered one complete step in the author's model, they clearly indicate the importance of conducting a thorough analysis of both independently. The third step is to "integrate and interpret" the data obtained from the person analysis and integrate and compare the data directly with the job analysis. The authors emphasize that the focus of this step should be on how well the person's competencies match those required for on-the-job success. The last step is to report the result to those concerned. The authors stress that the assessors should not jump to making conclusions at this stage but should objectively present the analyzed information in the proper context to allow the decision-makers to arrive at an appropriate conclusion and decision.

Goodstein and Prien are thorough and take the reader deeper into the analysis of the data. Chapter three focuses on psychological measurement. This chapter may be dry and unnecessary reading for many as it delves into the statistical analysis of various assessments. The justification for this chapter is clear but the challenge for the authors is not taking the reader too deep into the analysis of assessment data, which at times they do. Many readers will probably glaze over this chapter as they might never conduct the types of detailed analysis the authors present. The chapter, however, does provide readers with explanations of the importance of "reliability and validity" of assessment data and examples of different assessment techniques in psychological evaluations.

The remainder of the book takes us in greater detail through the remaining three steps of their five step individual assessment model. The authors explain that either hard or soft assessment data alone do not necessarily lead to conclusive results. Rather than jumping to implicit conclusions, the data should be the basis for the assessor to arrive at certain decisions or to take them in a specific direction. They clearly outline the importance of objective judgment and the minimization of errors when conducting employee assessments. Goodstein and Prien provide simple explanations of the process at times through real-life examples.

The remainder of the book takes us in greater detail through the remaining three steps of their five-step individual assessment model. In these sections, the authors are candid about how the assessment data does not necessarily conclude concrete data, either hard or soft. They clearly outline the importance of objective judgment and the minimization of errors when conducting employee assessments. Goodstein and Prien provide simple explanations of the process through real-life examples.

What is impressive is that the book provides a relatively quick read and complete explanation within a short 135 pages. It also provides a significant amount of support through its appendices including sample position descriptions, competency models for different levels in the organization, and sample reports to use as templates in your efforts.

The in depth discussion and explanation about the statistical validity of assessments may not be to your liking. If, however, you are new to assessments or it has become part of your responsibilities (the case for most managers) then this is recommended reading. After reading it you will feel that you possess a comprehensive understanding of employee assessments without having to read several texts on intense topics like psychology or quantitative analysis.

Ajay Pangarkar, CTDP, is partner and senior learning strategist at CentralKnowledge.com. He and his partner Teresa Kirkwood have recently published Building Business Acumen for Trainers: Skills to Empower the Learning Function *(Pfeiffer, 2006).*

Vendor Spotlight

This issues featured vendors are **Cambridge Communications, Central Knowledge, Freisen Kaye & Associates, IBM, Independent Learning Systems, IWCC, Ketch Consulting, Lingua Service** and **McKinley Solution Exchange**.

Watch for the fall issue of the Vendor Spotlight when we will once again introduce you to a select group of vendors. If you are a vendor member of the CSTD and wish to have your company featured contact Alistair Orr at 1-866-257-4275 or aorr@cstd.ca.

Effective Business Solutions

Effective Business Solutions

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Contact Ray Peterson
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Vendor Spotlight

Management Development

Management Development

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Learning & Development Consulting

Scott Jorgens, Business Development
sjorgens@ca.ibm.com

IBM's bilingual learning solutions help businesses improve the performance, develop the skills and deepen the knowledge of their people. IBM can also help you ensure that your learning initiatives are aligned with the goals of the business and the organization. The key element is developing learning strategies, training initiatives and governance models that deliver business benefits. The aim is to embed learning solutions in work processes to improve performance and adaptability. Our national Learning & Development consulting practice, designs, develops and delivers learning programs and content for clients. We also offer clients packaged learning programs, learning technology implementation and hosting, and outsourced learning solutions.

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