

Final report of the NCPP / FÁS Learning Network Project

Welcome

Foreword

This report describes a collaborative action research project involving the National Centre for Partnership and Performance (NCPP) and FÁS. The objective of the project was through investigation to identify and promote effective learning in public and private sector organisations in Ireland. The project set out to find insights into how organisations learn, how they use learning to improve their processes to meet their changing business needs and how organisations can achieve greater added value from learning interventions. A critical part of this project was the establishment of a practitioner network to facilitate a new understanding and awareness of the potential of learning in the workplace. The project included:

- An exploration of current literature on learning in organisations
- A survey of 16 organisations
- A dynamic practitioner network which provided the basis for the 13 organisational case studies included in this report
- Action learning projects undertaken by members of the network in their own organisation

This report presents a summary account of how the project unfolded and its principal findings. It will be promoted and disseminated among HR and training practitioners as part of the FÁS strategy to promote the central role of learning in organisations and the role of the NCPP to promote evidence of good practice that supports organisational change and high performance across Ireland's private and public sectors.

The report highlights how a systematic focus on workplace learning can produce a wider range of solutions for organisational problems. Learning can also help to achieve a better balance between long-term effectiveness and short-term efficiency in the organisation. Learning is the key to developing individual potential, enabling people to meet the demands of change in their workplace and contribute to their ongoing employability. The report also highlights the wide-ranging nature of informal learning and the opportunities that it presents to influence a culture of learning throughout the organisation.

We would like to take this opportunity to extend special thanks to the members of the network for participating and giving so generously of their time and expertise to the learning project. We would also like to acknowledge the contribution of the project research team, which comprised Cynthia Deane (Learning and Development Consultant); Dr Noreen Heraty and Mary Fitzpatrick (University of Limerick); Ian Hyland (FÁS); Dr Larry O'Connell (NCPP). In particular, Edna Jordan (NCPP) as the project manager has done an excellent job in co-ordinating the project and the research evidence.



Lucy Fallon Byrne
Director NCPP



Patricia Curtin
Assistant Director General FÁS

Analysis

**Building Learning
Organisations
through Networking**

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Analysis

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Chapter 1

Learning in the workplace of the future

Within the context of a global economy Irish organisations face the continued challenges of maintaining and increasing competitiveness while employees must ensure that they have the knowledge and skills to maintain their future employability. If organisations and their employees want to be able to meet the challenges of increased competition and changing customer expectations, they have no choice but to become more innovative about how they do their business, increase productivity, and achieve higher quality outputs. Broader socioeconomic factors are also driving the need for learning in the workplace. Such factors include the changing profile of the labour market, the growing emphasis on lifelong learning, and the need to cater for increasing diversity and social inclusion.

The final report of the Forum on the Workplace of the Future, *Working to our Advantage: A National Workplace Strategy*, states that the capacity for organisational learning is now one of the keys to innovation, competitiveness, employment growth and security.

The Forum report sets out a vision for the workplace of the future comprising nine interdependent characteristics, including the need to be *continually learning*. Organisations that do this encourage experimentation and are constantly focused on knowledge, training and skills development to increase the skill content in all work. These organisations utilise informal and formal systematic processes of skills upgrading and continual learning centred on training plans, needs assessment, employee support and funding mechanisms. This underlines the need for organisations to assess their work processes and organisational culture to identify opportunities for learning, questioning and exchange of information.¹

The Forum report highlights how pressures are altering the skill requirements in ways that have important implications for the relationship between learning and work. The report states that in addition to technical skills there is an increasing emphasis on the need for creative skills, expert knowledge, interpersonal skills, network and communication, and leadership skills. Many of these skills can only be acquired on the job. Therefore, organisations must adopt more participative approaches to work and at the same time assist employees in developing the skills needed to work in new ways. Workplace practices which enable organisations to take full advantage of the skills and knowledge of employees will be as important as education and training.² Therefore, the workplace of the future must have an emphasis on continual learning to meet business, customer and employee needs.

The Forum report also highlighted the importance of developing more informed accounts about learning in organisations, particularly in an Irish context. This provided the impetus for the NCPP and FÁS to establish a parallel learning organisation project that would explore some of the dynamics of learning in Irish organisations.

This project's terms of reference were practical in nature and focused on four key questions:

1. What does learning mean in organisations?
2. How can organisations develop or improve how they learn?
3. What are the practical benefits as learning becomes more valued within an organisation?
4. How can learning be sustained in organisations?

1. See Tjepkema et al. (2002), *HRD and Learning Organisations in Europe*, Harrison, R. (2004), *Human Resource Development in a Knowledge Economy*, Palgrave.

2. See Taylor, R. (2003), *Skills and Innovation in Modern Workplaces*, ESRC Future of Work Commentary Series, Economic and Social Research Council.

To address these questions the project combined several strands of enquiry. The academic literature on learning and the impact of network-led initiatives was examined. A background paper was developed, summarising the key themes on learning in organisations. Among other things this overview of the literature highlighted a general absence of case study research on learning in organisations, especially in Ireland. Based on the experiences documented in reports of three network-based projects, it was decided to set up a learning network as the key focus for the research for this project.³

This learning network was established to generate deeper insights into the benefits of different approaches to learning in organisations and to determine the real impact of learning on performance in the participating organisations. Box 1 provides an overview of the NCPP/FÁS Action Learning Network activities.

The network participants were actively involved at all stages of the project and in various ways. They provided information through a formal survey, researcher-led onsite visits and focus group discussions. They discussed the outcomes of ongoing research, carried out their own research, shared the results of their research, responded to and considered material, including formal and informal presentations and inputs, draft findings, and drafts of this report.⁴

A further strand of enquiry in this project was focused on collaboration within the network, which was used as a vehicle for collaborative and reflective enquiry into learning practices in organisations. Through the network, members found that they shared similar issues and concerns and together helped and supported each other to discover and implement new ideas and practices. Therefore, the project clearly demonstrates how practitioners benefit from working with a group of peers through networking.

This report is an active collaboration between researchers and practitioners and its findings have been worked out and examined in the context of real-life issues and concerns facing Irish organisations. For this reason the report and all of the work of the NCPP/FÁS Learning Network adds to the work of the Forum in a number of ways.

First, it provides a more detailed account of what learning actually means in a cross-section of Irish organisations, many of which are small organisations. Second, the work illustrates how organisations can develop and enhance the role of learning as a force for competitive advantage as well as personal and career development. Third, it reinforces the case for learning by outlining the practical benefits and positive outcomes experienced by participant organisations and individuals. Finally, the network can continue to provide an important testing ground for many of the ideas and work projects that are emerging as a result of the Forum recommendations.

³ In particular learning networks such as the FÁS NetMet Project, the IMI National Action Learning Project and Skillnets.

⁴ Full details of the project and research methodology are described later in this report.

BOX 1 NCPP / FÁS Action Learning Network

Network: Aims and objectives

A practitioner network was established for the mutual benefit of the research team and the individual members of the network. The participants were invited to become active members of a research project focused on:

- Improving learning in the participating organisations
- Determining the real impact of learning on performance
- Identifying practical solutions to improving learning and deepening the understanding of how learning works in their and other organisations
- Generating deeper insights into the benefits and potential for different approaches to learning in organisations.

The network was an action learning network where participants were encouraged not only to diagnose problems but also to take effective action and review the outcomes of the action.

Network: Membership and activities

The network was formally launched in November 2003 and met seven times between November 2003 and June 2004. A final two-day residential session was held in September 2004.

Sixteen organisations were invited to participate in the action learning network, and 13 of these organisations completed the project. The network comprised mainly HR/training managers representing a range of organisations from both the public and the private sectors, including large and small, old and new organisations. Most of the organisations were Dublin based with the exception of one based in Cork and another in Kerry. This mix of participants offered a rich and diverse range of experience that enhanced the entire project.

The network activities were designed to ensure that members would benefit from being part of the network as well as contributing to the NCPP/FÁS research. In particular, the network activities were arranged to ensure that they would have an opportunity to share their experiences of and concerns about learning in their organisations,

to learn from each other, and to have their existing learning practices validated. In addition, through the network they would be supported and guided through various activities that would:

- Identify the existing state of learning in their organisations
- Encourage the setting of development goals for themselves, their department and the organisation
- Advance towards these goals with the support of the project
- Enter a new phase of organisational learning.

The network meetings were structured to include opportunities for formal inputs from invited expert speakers and practitioners, exploratory workshops and informal group discussions. Issues and themes were explored as they emerged through the questionnaire, interviews, focus group meetings and during the network meetings themselves. The focus of all of the network activities was on the real world in real time.

BOX 1 NCPP / FÁS Action Learning Network

During the first meeting, participants were invited to identify their individual objectives and expectations of the network. They expressed an interest in meeting other practitioners who wanted to improve learning in their organisation, share their experiences and compare their learning practices and activities with other participants. Some wanted to use the opportunity to benchmark their own company's performance using formal frameworks, while others hoped to learn about new ideas and practices that could be applied, and perhaps be of benefit, to their organisation. A core feature of the network involved members undertaking action-orientated research in their own organisation on themes that they identified. These themes included:

- Managing change in the internal and external environment
- Monitoring the outcomes and results of learning to ensure that it represented a good return on investment

- Creating a learning culture, especially among senior management
- Promoting and communicating learning approaches in the company
- Developing and implementing organisational learning policies.

Network members were in effect on-the-job researchers, critically examining aspects of their organisation's learning practices as a means of advancing their own learning. This approach provided a rich learning resource for members of the network, and also produced unique and valuable insights into the particular learning intervention/problem that they were examining. A summary report of each project is included in the case studies contained in this report. A full description of the action research projects is available on the NCPP website: www.ncpp.ie

Network: Case study design and research methodology

A rich body of data about learning in this group of organisations has been generated using various research methodologies. The research focused on the 13 members of the NCPP/FÁS Action Learning Network. Systematic case study research was carried out within each organisation to identify and analyse their current learning practices and other issues. The research methods comprised:

- Completion of a questionnaire among 16 organisations (including three organisations that did not complete the project)
- One-to-one interviews with individual network members
- A guided focus group discussion involving key organisational stakeholders, facilitated by the network member, observed and supported by a researcher.

The questionnaire was designed to capture information that would provide a snapshot of learning activities in the organisations represented in the network.⁵ It comprised a set of questions about learning in the participant organisations, covering issues such as their formal learning policy, learning activities and interventions, attitudes to learning and approaches to evaluation of learning activities.

5. See Appendix II: Organisation learning activities questionnaire.

BOX 1 NCPP / FÁS Action Learning Network

The questionnaire was distributed to the participating organisations during the first meeting of the network. This provided them with the opportunity to initiate completion of the questionnaires, ask questions and seek clarification in relation to specific questions and the management of the information.

Linked to the completion of the questionnaire, the first of two site visits to each organisation by a researcher took place. The researcher met with individual network participants to gain greater understanding of the existing state of learning in each organisation. The information gleaned from the questionnaire responses was used as the basis for these semi-structured interviews.⁶

During the second round of site visits the researcher collaborated with and supported individual network members to facilitate a focus group of key organisational stakeholders.⁷ These focus group activities provided an opportunity for the network member to explore the perspectives of managers and employees in relation to their experience and attitude to learning in their organisation and/or in relation to specific learning interventions.

Based on the responses to the questionnaire and on the two site visits, the researchers compiled a case study on each of the participating organisations. Network members validated the content of the case studies, which are included in this report.

6. See Appendix III: Guiding questions for one-to-one interviews with network members.

7. See Appendix IV: Guiding questions for onsite focus group discussions in participating organisations.

Chapter 2

Taking stock – what does learning mean in organisations?

The literature and research on learning in organisations provides insights into why organisational learning is important, how organisations learn and benefit from learning, and identifies some of the practices that support learning in organisations.

A key finding to emerge across various strands of literature on organisational learning, reviewed as background for this report, is that organisations learn best when there is a strong imperative to learn. Responding to changes in their competitive environment and customer demands motivates them to develop new competences and practices.⁸ The literature also shows that organisations learn best when there is a clear *intendedness* about promoting and harnessing the full potential of learning in all of its sources. This intendedness is characterised by a systematic approach and the allocation of dedicated resources to support both the formal and informal learning dimensions of all aspects of learning interventions and, more importantly, the informal learning dimension of all aspects of the business.

However, there is very little hard research evidence, particularly in Ireland, that demonstrates how organisations go about learning on a daily basis and how they can benefit from becoming more focused on learning. Many Irish organisations engage in learning but there appears to be little attempt to enable them to take stock and benchmark what they are doing in order to foster learning and to achieve added value from their learning interventions.

This chapter provides such an assessment by outlining the experience of learning in a cross-section of Irish organisations. The chapter focuses on the process of learning within 16 organisations that participated in the initial survey research. It is structured around three questions:

1. What are organisations doing to support learning?
2. What are the critical factors influencing learning in Irish organisations?
3. Why are organisations investing in learning at work?

What are organisations doing to support learning?

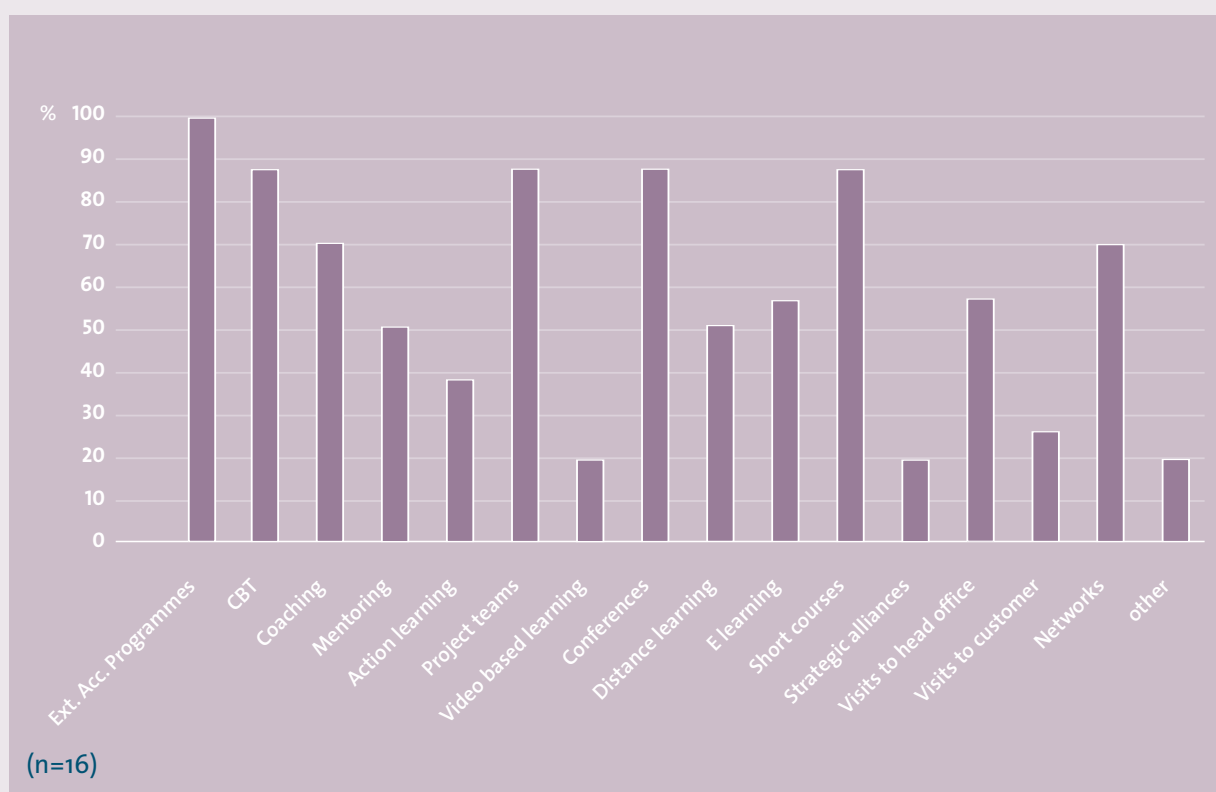
It is difficult to classify approaches to learning because organisations variously adopt systems and practices that best suit their specific requirements. This is also true of members of the network organisations. They indicate that they tend to vary their approach according to the circumstances, the learners involved and the supports available.

Figure 1 provides an overview of the range of learning activities these organisations are engaged in. Accredited programmes, competency-based training, project teams, conferences and short courses are among the most common learning activities in the network member organisations. Over half of the organisations stated that they spend up to €500 per employee per annum on formal learning intervention.

However, in spite of this variety it is possible to identify three distinct approaches or orientations:

8. Deane, C. (2003), Background Paper entitled 'Promoting Effective Learning in the Workplace', FÁS /NCPP collaborative project

FIGURE 1 Learning activities



1. Formal educational orientation: Some organisations have expanded the range of learning and training opportunities they provide. Specifically, this has tended to follow a formalised learning approach and, for many network participants, has resulted in a strong educational orientation to much of their learning provision.

2. Experiential orientation: Other organisations have tended to concentrate more on the development and enhancement of organisation-specific skills. The focus is more on experiential learning and on-the-job training, than off-the-job formal events per se. For example, the Mespil Hotel has a strong focus on experiential learning that is supported by an identified 'buddy' system, while a comment from the Filestores case provides further illustration here:

If you ask any operator 'how did you learn to do that', then they will tell you — on the job. They spend a week with this guy and he shows them how to do it, and then they spend a few hours with another man.... There is no sign-off for on-the-job training, i.e. there is no sign-off for informal training.

3. Competency framework orientation: A small number of participants have initiated the development of a competency framework approach to learning at work, which involves the identification of specific skills sets for categories of employees, though these have not reached the stage of full development at this point.

FIGURE 2 Who decides what type of learning is required at work?

Alongside each approach to learning, organisations also invest in evaluative processes — both in terms of learning needs and outcomes. All of the organisations use formal arrangements to identify training needs. A large proportion of the network organisations report that they use a combination of performance management systems, personal development plans and organisational training-needs analysis to identify individual learning needs, while staff surveys are used by 50 per cent of the organisations.

Almost all of the organisations evaluate learning activities. Approximately two-thirds evaluate using the total number of training days provided; slightly more benchmark learning interventions against the achievement of their objectives, outlined in training and development plans. Finally, 61 per cent use examination pass rates as an evaluation measure.

Getting added value from their formal training activities is a major concern and respondents identified a number of indicators that can be used to build the business case for learning. Their responses included fewer customer complaints, improved staff retention, increased promotability and improved quality and productivity.

What are the critical factors influencing learning in Irish organisations?

Decisions regarding the type of learning that is required are made by a variety of role holders across the network organisations. However, the evidence suggests that there is collaboration between the HR/training departments, individual departments, employees and line managers (Figure 2).

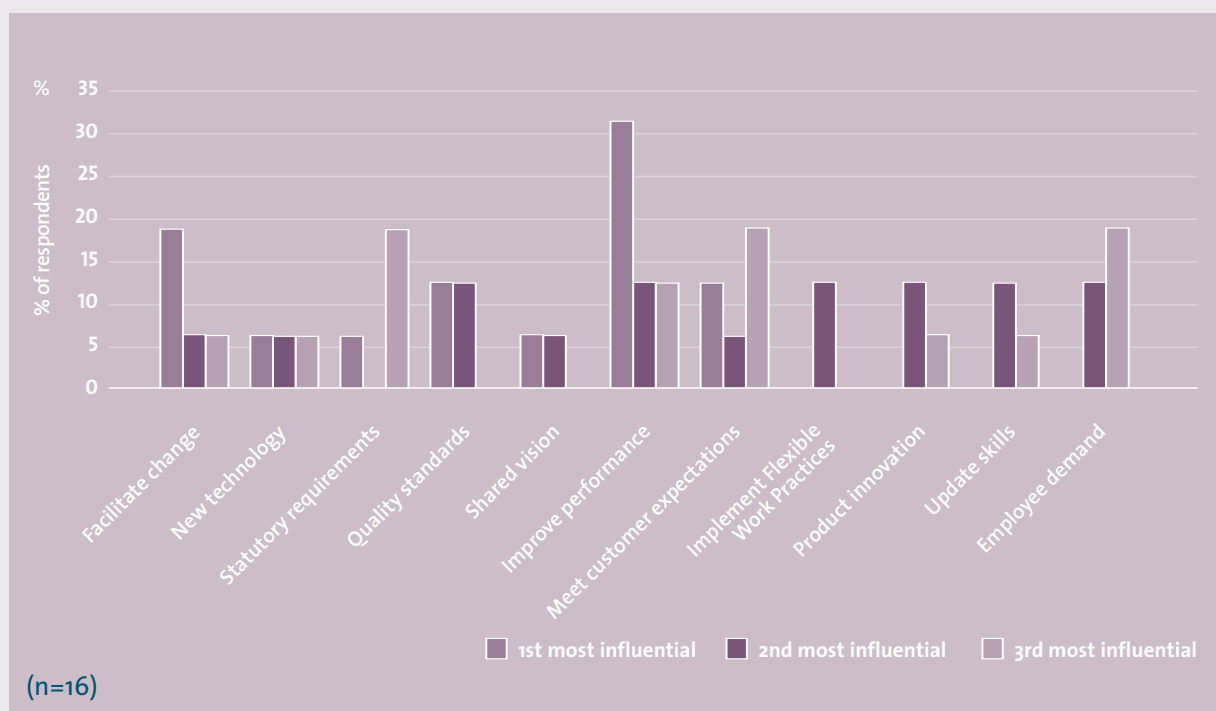
People learn diversely and lastingly through their experiences of work and workplaces. In order to understand learning at work, we need to understand changing work contexts. Learning is embedded in work, which is increasingly coming under the influence of forces external to itself, giving rise to change, adaptation and learning.⁹

Members were asked to identify the factors influencing learning in their organisation. Figure 3 summarises the top three influences reported by the organisations. From this it is possible to identify three broad drivers of learning:

- The macro-environment and pressures experienced by organisations
- The need to attract and retain staff
- The need for staff involvement and participation.

9. Barnett, R. (1999), 'Learning to Work and Working to Learn', in Boud, D. & J. Garrick (eds), *Understanding Learning at Work*, London: Routledge.

FIGURE 3 Most influential factors on type of learning undertaken



Macro-operating environment: All network members noted that their external macro-operating environment has become increasingly difficult. Not surprisingly then, the need to improve performance and facilitate change are the most influential factors on the type of learning undertaken in the network organisations. Accordingly, there is a lot of variation in the openness towards learning even within individual organisations. A substantial proportion of the organisations report that some departments/units embrace learning more fully than others and cited the following as influential factors:

- The commitment of managers, supervisors, team leaders
- The department/unit with the most enthusiastic or committed manager
- Those interested in developing their role, promotion or moving jobs
- Level of seniority in the organisation, i.e. more senior grades are more open to participating in learning.

Within the network, private sector organisations identified specific competitive pressures in their environment, including cost reduction, the need to grow the business base, competitor activities and customer expectations, while public sector organisations cited financial cutbacks, deregulation and reforms as significant factors in their operating environments. External environmental pressures such as these are seen to drive or leverage product and service improvements and these have appreciable impact on the nature and type of learning required. In addition, while some of these pressures call for greater application of learning from organisational members, there is seldom an additional budget, thus increasing the demands on what may already be stretched resources.

Attracting and retaining staff: Members of the network also identified problems with sourcing and/or retaining key employees. For some organisations this relates to a difficulty in filling entry-level positions, while the problem for others lies in sourcing appropriately skilled staff. Moreover, they recognised the added pressure of retaining core staff, especially in environments where market

opportunities are buoyant for high-skilled individuals. The situation becomes one of leveraging learning as an attractive feature of the job role, while recognising the almost inevitable problem this may create down the line as staff become 'overqualified' for the positions they hold.

Staff involvement and participation: A third common driver identified by almost all members of the network was the belief that all organisational members need to become more intrinsically involved in learning. They noted that the workplace today requires all employees to take on greater responsibility for personal and career development and to take a more active role in their job, i.e. greater autonomy, more communication, more creative input into decision-making. Each of these requirements calls for greater involvement in work and often organisational members may not be well equipped to do this, thus creating a demand for appropriate learning interventions to facilitate greater involvement and participation.

Why are organisations investing in learning at work?

In view of the environmental and institutional pressures being experienced by participants in the study, it is to be expected that most of them invest in learning for strongly pragmatic reasons. A number of generic themes emerged, including:

- The need to focus on skills and abilities that will improve work and organisation performance
- The need to meet customer expectations
- The need to facilitate the implementation of change
- The need to identify and improve the skills and motivation of existing employees
- The need to help employees to manage their careers.

For most of the organisations represented in the network, learning is used as a key tool in the pursuit of quality, cost reduction or some form of enhanced performance. In some instances, this is articulated in the business strategy, but for others learning is often identified as the enabler of strategy, rather than the driver in itself. Here, targeted investment in learning is used to deal with various challenges associated with competition, change and technology. In this way, learning can be tied to specific business requirements. The following are illustrative in this regard:

We have embarked on Ireland's Best Service Excellence Award with the expressed objective to improve our efficiency... to increase market share to protect our bottom line, to enhance our reputation, to satisfy customers and so on.

The Mespil Hotel

People who are trained to an expert level to be innovative, know what they are doing and they are not afraid to try (to do) things differently.

Filestores

Learning is regarded as important at the organisational level in terms of strategic needs and equipping staff for changes in the marketplace. Secondly, learning is regarded as important for personal development and capability building.

Fáilte Ireland

Learning at work can also be approached more strategically as a specific source of competitive advantage for the organisation. Organisations are using learning at work to differentiate themselves in their marketplace - to distinguish themselves through the range of knowledge, skills and abilities they promote and deliver. They also value the productivity and efficiency benefits associated with this learning:

The best reps will get the best results; the best reps are the ones who invest in their knowledge.

GSK

If you use learning effectively within the organisation, you are hoping that this will improve performance, although you can't prove it yet.

The Courts Service

It's all about improving the way we work – improving how we do things.

FEXCO

While clearly articulating a rational and pragmatic valuing of learning at work, the participating organisations also noted a somewhat more philanthropic approach to their learning effort. They spoke of their commitment to developing a general climate of learning at work where individuals could feel comfortable engaging with their work and are encouraged to participate and develop within their roles. The following statements help to illustrate this point:

A key priority is the continued development and reinforcement of a knowledge-sharing culture, which provides the platform for mature prioritisation and decision-making, and the ongoing investment in a highly motivated team with clearly defined goals and objectives and a focus on timely delivery.

ComReg

The formal learning policy indicates commitment to the ongoing development of its employees as a major resource and the adoption of a lifelong learning commitment.

FÁS

Conclusions: Enhancing the role of learning in organisations

The assessment of learning within the network organisations suggests a high level of awareness in relation to the potential for learning and its role in response to competitive pressures and the changing needs of employees.

The results of the survey suggest learning is approached in very different ways even within the same organisation. However, all participants in the learning network noted the need to shift the emphasis from training and development to learning. There is a clear recognition that formal training activities are only one of many opportunities for learning within the workplace. A key challenge identified during the research is the need to systematically capture benefits associated with all forms of learning – in particular informal learning.

This pressure to enhance the role of learning is linked to what participants see as an increasingly challenging competitive environment and set of customer expectations. It is also critical if organisations are to source and retain staff and support greater levels of employee involvement and development.

Chapter 3

Towards better learning in the workplace – how can organisations develop or improve how they learn?

The previous chapter identified the need to enhance and develop the role of learning in organisations — both from an employee and organisational perspective. The literature reviewed suggested that there is no one ‘right’ solution, and that instead organisations must be encouraged and supported to develop strategies which are appropriate to their business context and employee needs. The survey carried out at the start of the project provided useful insights into the approaches to learning in the participating organisations.

As the project evolved, the research team and the network participants found that they began to look more closely at learning in their own organisation. During this time participants were meeting on a monthly basis.

The project team provided support and arranged a number of inputs to each network meeting, including guest inputs from specialists in the area. The team also carried out a second research site visit and supported members of the network to facilitate focus group meetings involving key organisational stakeholders within each organisation.

The key challenge for the participants was to look more closely at learning in their organisations and to develop useful approaches by which it might be improved. As the project developed, members of the network began to identify specific features within their own operating environments that positively supported and enabled effective learning in their workplace.¹¹ Although some variation exists, their views tended to coalesce around the following core features.

Developing a more communicative and collaborative work environment

Learning can be supported firstly by fostering a more communicative and collaborative environment in which individuals learn from each other. By way of illustration, respondents such as Alpha, the Courts Service, Dara Creative Communications and the Jurys Doyle Hotel Group, all highlighted the key role of open and flexible communication as a core enabler of effective learning. This open communication is closely associated with strong teamwork and a willingness to share good practice or relevant information. The cases of both Dara Creative and the National Learning Network (NLN) provide an insight:

Learning from each other and learning from successes is important. Learning from people needs openness and trust. You will see tangible benefits ... in terms of people, procedures, atmosphere, clients... that spreads news of us and is good for relationships, which helps the bottom line.

Dara Creative Communications

Use of quarterly focus groups to examine training and development needs a very open communication system within the organisation with people being seen as very approachable, supportive and encouraging of newcomers to ask questions.

NLN

¹¹ This concern with the environment or culture is a strong feature in the literature. For example, a number of researchers have found that effective learning at work is facilitated by an environment that actively supports the acquisition and sharing of new learning and knowledge (for examples see Brewster et al. 2000; Dibella et al. 1996; Senge 1990; Slater 1995, and Watkins & Marsick 1996).

TABLE 1 Inputs and preparation for individual action learning projects

Date	Inputs	Participant actions
Jan 2004	Introduced framework for individual action learning project	Began to identify topics for their action research project Began to gather data and decided on action or intervention
Feb 2004	Review of project rationale and expected outcomes	Reported on progress of their projects Identified their concerns/research questions
March 2004	'Sharing Learning' input on competency frameworks by Fergus Barry, IMI	Implemented action in their organisation and began to document the process
April 2004	'Sharing Learning' input from Patrick O'Sullivan, FÁS 'Learning Champions' discussion facilitated by Dr Noreen Heraty, UL	Began to plan for focus groups: selected people and proposed questions Continued to document progress of project
May 2004	'Lifelong Learning in the Workplace' input from Eddie Shaw, FÁS Progress reports on action research projects. Small group discussion of project experiences. Guidelines for project reports presented	Made arrangements for focus groups Continued to document progress of project Conducted focus groups Facilitated site visit by project researcher
June 2004	'Promoting Effective Learning — A Practical Approach' input by Denise Banks, Learning and Development, AIB Capital Markets Workshop session on guidelines for best practice in promoting effective learning at work	Participants completed action research project reports
Sept 2004	Reviewing impact and learning arising from the project	Feedback report from network members

For small companies, making a strong commitment to learning and training can be difficult. Small and medium-sized enterprises (SMEs) recognise the inherent value in their people, because they have to depend on each other in order to drive the business forward and become successful. Highly trained, knowledgeable, fully committed and happy staff can often become a company's competitive advantage.

Links with accreditation and standards bodies

Second, the network members identified the existence or development of a highly structured learning system as an important enabler of learning. While most participants cited the importance of an effective learning infrastructure, for some organisations a key enabler of their learning effort is their strong link with skill formation systems or validation bodies, e.g. the FÁS Excellence Through People (ETP) standard or links with various accreditation bodies. These close linkages are seen both as a testament to the quality of their learning effort, and as a useful benchmark of standards within their sphere. Moreover, links with accrediting or validating professional bodies, and the accreditation of prior learning, is seen as an attractive feature of the learning environment for core employees and staff. Key examples of these links are evident in the Fáilte Ireland, ComReg, Fexco, Jurys Doyle Hotel Group, Mespil Hotel and Alpha cases.

Making learning explicit in human resources (HR) systems

Third, the network members also noted the importance of integrating learning within complementary HR systems. Participants consistently noted the close interplay between their systems of performance management, recruitment and selection and reward structures. They observed the importance of ensuring that organisational members were all aware of the priority attached to learning, and that this was reinforced in the range of systems they developed to recruit, induct, promote and reward individuals. Most participants cited recognition,

praise, regular feedback on performance and the provision of timely information about likely organisational changes and their impact on their work as key enablers of learning. For example, in a number of organisations, learning has been used successfully to support organisational development, through the introduction of a performance management and review system. In Fexco, the training of inhouse facilitators has proved very successful and has created 'champions' of the review process in the organisation as well as providing staff with the necessary facilitation skills.

A systematic approach to learning

Finally, the network members noted that adopting a systematic approach to learning has enabled organisations to create a tangible link between their strategy and the design and delivery of training and development. A number of the network members indicated that they used the action learning project (one of this project's research activities, see Box 2) in their organisation to formulate a new learning strategy for the future, with a focus on assisting managers and staff to make the organisation more effective, more efficient and more focused on delivering quality customer service. One of the organisations found that a new e-learning tool for training staff was useful, but only if combined with other training and development methods. It found that given the time, commitment and the degree of self-discipline and direction required for e-learning, the outcome was more successful where sessions were facilitated for staff with an expert available to answer queries as individuals went through the course material. It also found that there was more buy-in and commitment from staff to e-learning when they were involved in decisions on the type of material chosen for this type of learning. Other examples of the systematic approach include documented work processes/work manuals, formal work meetings, working with external stakeholders or partners, and expressed commitment from senior levels.

BOX 2 Individual Action Learning Projects – Study Design

Following the assessment summarised in Chapter 2 the network members began to identify the kind of action learning project that they might undertake in their own organisation as part of the network activities.

The following questions were proposed as a way of helping them to frame the possible project:

- Is there a need or desire for change in any aspect of your organisation's learning practice?
- Do you have a specific concern, issue or research question that you want to address?
- Do you want to research something positive: why is something working really well, and what can we learn from it?
- What outcome would you like to achieve? Have you specific goals?
- What information or data do you need to gather to help you (and others) to understand the issue better?
- What baseline data do you need to have so that you can monitor the impact of your action?

The network members were also provided with a framework to guide their reflections on the findings of their initial analysis, to identify gaps, needs, goals, targets, and to decide on appropriate actions.¹² They then implemented the actions and documented the process, having first given some thought to how they might measure the outcomes of their interventions. They were encouraged to work with a 'critical friend' or somebody with whom they could discuss the project and share ideas. In practice, this was usually, but not always, a colleague within the organisation. Participants were also encouraged to keep a journal where they could record the progress of the project and to help them to reflect on their learning. This demonstrated the value among the network participants of *reflective practice* as a way of linking individual learning with organisational learning.

For the purpose of the project, most people decided to focus on just one or two aspects of practice and to show the change that had come about as a result of their action. They were able to show how they had influenced their work situation for the better and to produce evidence to validate or back up their claim. They each wrote a short report, outlining what they set out to achieve, the action they took, and the outcomes they observed.

¹² See Appendix V: Guiding principles and framework for individual action learning projects.

Learning through action-led enquiry

Building on the network members' central involvement in the completion of questionnaires and semi-structured one-to-one interviews and discussion of the related outcomes, in January 2004 members began to identify action learning projects that they would carry out in their own organisations. These projects were designed collaboratively with the support of the research team. The projects were all focused on real-life issues facing the members of the network in their own organisations. Box 2 provides a description of how these projects were designed and supported.

In the individual project reports that were produced as part of this project, the participants tell their own stories. These reports draw on their personal learning experience and, at the same time, they have become part of a vital body of knowledge, showing the power of learning to make change happen. Summaries of the individual project reports on the following themes are included as part of the case-studies section of this report:

- Building the capacity of training champions
- Developing leadership skills
- Career development and succession planning
- Introducing e-learning
- Achieving the Irish Hotel Industry Best Service Excellence Award
- Enhancing interpersonal skills
- Learning to change
- Linking individual and organisational learning goals
- Enhancing communication through peer consultation
- Developing a learning strategy
- Formulating an action plan for learning and development
- Using e-learning for certified training.

Detailed accounts of these individual projects can be found on the NCPP website: www.ncpp.ie

Conclusion: Creating an environment to support learning

The case studies, the network members' research within their own organisations and the various expert inputs during the network meetings highlight a number of key actions that enable learning to develop and improve within organisations. The actions include:

- Developing a communicative and collaborative environment
- Developing standards and links with accreditation bodies
- Ensuring HR systems complement learning
- Linking learning to strategic issues in the organisation
- Promoting organisational commitment to learning by making it more visible.

Chapter 4

What are the practical benefits of promoting learning in organisations?

Chapter 3 illustrated the type of changes required in order to create more emphasis on learning. However, because this report is based on the detailed activities of individual practitioners who were members of the learning network, it is able to provide further detail in relation to types of specific changes and improvements that arise.

Members of the network were asked whether and how they could tell if they were getting any 'added value' from their learning effort and involvement in the learning network. The members noted that their perception of learning and its link to training had changed and that they had moved to develop more systematic approaches to learning. They also noted that they had experienced a number of specific organisational and personal benefits associated with their participation in the network. Finally, many of the organisations noted that more systematic approaches to learning have also contributed to improved workplace relations, employee confidence, recruitment and retention and greater levels of efficiency.

This chapter outlines the benefits that the project participants associated with their participation in the network.

From training to learning

One of the most significant changes to have occurred over the duration of the learning network was a reorienting of perceptions of what constitutes learning at work. Here, respondents indicated that their whole thinking had changed such that they came to understand learning as comprising significantly more than training events. The following are illustrative here:

Although the organisation was moving towards the whole concept of 'learning' rather than 'training', my participation on the Learning Network has caused this to take place a lot earlier than would have happened otherwise.

The main change has been referring to my role as 'learning and development manager' rather than being focused purely on 'training'. Obviously, this has had an impact on the type of language used around the office as well. I'm hoping that staff recognise that as an organisation we are concerned about the 'whole' learning experience that can be gained from working with us and that 'training' is a part of that, but there are other aspects too.

Better learning systems

Members of the network were satisfied that their system of learning had perceptively improved during their participation in the network. Here, several respondents noted the greater effectiveness of their learning, training and development-needs identification through a stronger commitment to individual personal development plans (PDPs), to a more focused performance management system and to greater recognition of individual learning effort. The members themselves felt they were more aware of the external supports for learning that currently exist, and were more knowledgeable generally about the nature of learning at work. The following case excerpts are illustrative here:

A key enabler in the embedding of a learning culture within the organisation has been the opportunity the performance and development system provides for individual staff to consider and develop their own learning plan and assisted the organisation to clarify its priorities in training and development.

The Courts Service

The PDP (global system that is PC based) process is both bottom up and top down as it links the individual training needs to the key business priorities as identified by management.

GSK

Whereas the network participants had previously placed an emphasis on providing formal training events, they indicated that they began to concentrate more on promoting informal learning. They became increasingly aware that people in organisations are learning (informally) all the time, and that it is important to put in place good systems and structures to harness and support this learning. The following example is illustrative here:

I am in the process of putting technical trainers through a Certificate in Training Programme. This is giving me an opportunity to help them to see the value in generating more experiential learning through their training, to evaluate needs regularly through monitoring, and create opportunities for learning through giving feedback.

Alpha

Improved workplace relationships through more effective communication

Participants suggested that their work environment has become more open and that communication appears to be flowing more freely. Good communication is central to the learning process, and one of the most important learning points has been the importance of teamwork and the benefits of effective communication throughout the organisation. Individual participants relate an increased willingness of people to learn at work, especially in a group and from each other on the job.

Communication helps to establish clearer understanding of each other's roles, including the pressures that different jobs involve. The individual learning projects that aimed to promote better communication have contributed to more collaborative and productive working relationships, increased self-confidence, self-direction and communication skills. They enabled colleagues to share knowledge and to gain access to new knowledge from others. This resulted in improved quality of work and better performance, as well as developing a shared and supportive organisation culture. Specifically, they noted that the language of learning is now more pervasive within their organisation and that their personal perception of what learning at work means has broadened in context and orientation.

The action learning project prompted a newly appointed Training and Development Manager to ask questions of the kind of learning that should happen in the company. It helped her to develop a knowledge and understanding of the company's business functions, the management and staff, the company culture, and the expectations and issues that would need to be addressed in the future from a training and development perspective.

For another network member, the project showed the ability that distinguishes the outstanding supervisor is not technical but rather relates to interpersonal skills. These skills can be developed through learning which is further reinforced if followed up with coaching, and as a result this organisation in particular is taking steps to facilitate it.

The success of a formal training project in one organisation was primarily due to the follow-up by the managers. The action taken by management demonstrated and reinforced the learning from a leadership programme, by linking the formal training with the programme participants' own development.

Increased employee confidence

Some members suggested that their increased focus on learning has resulted in a greater confidence among organisational members to become involved in developmental activities at work, for example, the Learning Champion role that was established by FEXCO. This heightened confidence is seen to have a positive impact on the quality of work performance. This is demonstrated in the following example:

We believe that learning encourages employee development and results in a high standard of employee performance within a pressurised environment.... Interest in learning has mushroomed in the organisation, especially at the level of supervisors, whose self-esteem has been greatly enhanced by participating in the project. Supervisors are critical in passing on learning to new employees. A 'team trainer' role has been created throughout the organisation as a result of the project.

Jurys Doyle Hotel Group

More effective recruitment and selection and improved retention of key employees

Retention and recruitment had a particular resonance with some of the participant organisations. The suggestion was made that earning a reputation as an employer who values learning strengthens the internal labour market and makes additional recruitment easier.

Improved service and productivity

Although not specifically mentioned by all network members, it was variously indicated that better trained and more knowledgeable employees and staff tend to be more effective in their roles.

Added value from investment in learning is demonstrated through customer comments and staff efficiency, in addition to accreditation success. Customer satisfaction and the Best Service Excellence Award are best achieved by employees who are well trained and competent in their jobs.... competence leads to greater job satisfaction and reduced staff turnover.

The Mespil Hotel

Conclusion: Benefits of a network approach to improving learning in organisations

Participation in the network and the individual action learning projects was also viewed as a significant factor that influenced a range of other learning outcomes and events in participants' organisations. Some members said that they gained a high level of personal learning, which they directly attributed to participation in the network activities, including the focused discussions and presentations, the action learning projects, the case-study research and, importantly, the close interaction between network members. They took on new ideas, began to think strategically about their future needs, and planned learning to support their strategy. They reported increased confidence in promoting learning activities at work, and they began to re-orientate learning policy, to redesign their training process, to involve managers at all levels of learning and development and to drive it through their departments. They also recognised the importance of enhanced communications and

of 'branding' learning and training in the organisation. The following comments describe some of the changes in practice that members say have come about as a result of their participation in the learning network.

The project complemented a range of activities in the training and development area. It helped us to 'drill down' and analyse the impact of learning on the delivery of service. It pointed out the importance of management buy-in, and showed us that learning works better when managers are committed to learning and are active in promoting it among their staff. The project showed how the nature of the organisation creates a learning culture. It made us look at how effective our learning programmes were, and how to influence the strategic direction of the organisation.

I have opened a library – to allow those who wish to learn to do so at their own pace. I've become more aware of what FÁS has to offer and have been providing CBT (competency-based training) through FÁS e-college for anyone who wants to avail of this. I've launched a learner award to encourage people to avail of learning opportunities all around them. Something very basic – I've bought a glass-cased notice board specifically for training to spread the message of learning. Based on the AIB presentation, I have just issued all business units with a training needs analysis form for 2005 – prioritising needs on impact on business objectives.

I am embarking on the use of more focus group meetings. We have changed our Educational Assistance Programme due to the insights I got from other network participants.

I have evaluated all types of training and established a trainers' meeting with team trainers from various departments, which I hope will establish a learning culture. I plan to do much more training in coaching for managers, supervisors and team trainers.

Line managers need to take responsibility for learning on teams. I am going to put my ideas on learning in the form of a presentation to the management team to build support for this.

We were going to implement personal learning action plans anyway, but the project gave us a convenient vehicle for the introduction of this action. People knew there was an external report, and the project encouraged us to start a number of other new actions.

We are in the process of implementing the recommendations of our action learning project, and we will know in 6—9 months what the impact has been. The project imposed a structure on the evaluation that was being carried out. The recommendations would not have come forward so systematically without the support of the project.

The learning (arising from the project) has been very valuable. The role of the project manager is validated, and it is clear that the manager has to be in control of the project. We learned that it is not enough to give out information; we must communicate with people. In future the project managers will be more proactive in working groups, will guide the change process, and will communicate effectively, involving representative and partnership groups in a constructive way.

Chapter 5

What should organisations do to sustain learning in the workplace?

The NCPP/FÁS network has opened a window on learning in organisations and describes sets of practices that were positively utilised in the network organisations. This chapter provides a summary of the key lessons learned within the network and offers some practical guidelines for practitioners.

However, the network has also raised many issues which remain unresolved and which the members believe will be critical if learning is to be sustained in their own organisations. This chapter finishes with a discussion of a number of these issues.

The project aimed to find out how organisations learn, and how they use learning to improve their processes and meet their changing business needs. Using an action research approach which incorporated an overview of the current literature on learning in organisations, the establishment of a practitioner network, case-study research and, individual action learning projects in the participating organisations, the project has produced a body of new knowledge about learning at work in Ireland: what it is, how it can be fostered and how to manage it so that it works to the advantage of both individuals and organisations. This project has shown that prioritising learning brings mutual benefits to organisations and their employees: when there is a commitment to learning in an organisation, and when that commitment is translated into real support for all kinds of learning activities, then effective learning happens and it has a significant impact on how the organisation performs.

If learning is to be valued and to be effective, then clearly *learning must be shared*. It has to be something more than information/knowledge that is stored in individuals' heads. The network organisations are clearly seeking to institutionalise systems and procedures that will promote learning and facilitate sharing knowledge, information and experience. In the first instance, learning at work in these case companies is seen as a valued activity – by all stakeholders. The network participants recognise that employees and staff must view learning as a valuable and valued organisational activity if they are going to engage in it. This suggests that *learning at work has some demonstrable value* – tangible or intangible. For some employees this might involve promotion or other rewards, for others it might be altered working practices or opportunities to engage outside of their roles, for others still a chance to build their qualifications/skills portfolio.

For the organisations concerned, learning must have value in that it is seen to contribute to some type of efficiency improvement, greater ability to attract and retain 'good' employees or greater ability to weather change and restructuring. There is an inevitable link, then, with policies and procedures governing recruitment, selection and induction, HR planning, performance management and reward, career development, and indeed job and work design more generally. A number of specific practice guidelines can be taken from the experiences of the network participants as follows:

Be aware of the power of learning to change the culture of the organisation.

Fostering learning at work

- Make learning part of the business agenda, and promote this awareness among the management team
- Develop a management culture based on co-operation, communication and partnership between management and employees and one which promotes dialogue and flexibility in the learning process
- Provide formal training in coaching and mentoring for managers and supervisors
- Link, promote and prioritise learning through other human resource systems, for example, recruitment, induction, performance management and development
- Recognise the importance of induction, which has a significant influence on how people learn and develop throughout their career
- Establish a practice of drawing up a personal learning and development plan for each employee
- Give recognition for people's learning achievements
- Recognise learning as a business investment that pays dividends
- When budgeting for learning, be sure to provide a balance of internal and external, formal and informal learning opportunities
- Be aware of the power of learning to change the culture of the organisation.

Managing learning at work

- Shift the focus from *training* to *learning*
- Promote the idea that learning and development is an integral part of everyone's role and responsibilities
- Add value to existing organisational activity, for example, an induction programme by prioritising and promoting how the organisation values learning in all its forms
- Find ways of managing formal learning activities so that they fit with business needs, for example, by providing short on-the-job training or information-sharing sessions
- Win the support of managers to ensure that learning translates into improvements in work practice
- Develop formal internal champion roles at various levels to promote particular learning initiatives/programmes/processes
- Make the learning process explicit and visible throughout the organisation, for example, by creating a distinctive brand identity for learning.

Practices that facilitate learning through sharing knowledge and information

- Encourage the establishment of debriefing sessions after formal training/learning events to share new knowledge
- Design, implement and support mentoring and coaching systems
- Apply action learning approaches where real problems form the focus of personal learning or education programmes
- Establish systems to scan the environment for new information
- Establish weekly and monthly meeting arrangements across different functional areas to facilitate and enhance shared learning opportunities
- Experiment with new learning tools, including e-learning and learning sets

- Provide certification and accredited formal workplace learning opportunities as a key element of learning activities.

Challenges for the future

The network members believe that learning must be approached as an ongoing work in progress. There is and will always be scope for improvement. As they worked to improve learning within their own organisation and during many of the discussions that were part of the network meetings, a number of key challenges emerged that will require ongoing attention not only for the network members themselves but for all organisations. These challenges are summarised in the remainder of this chapter.

Workplace learning is a distinctive organisational competence.

Using existing learning to best effect

An enduring challenge for all organisations is clearly one of creating time and space for learning at work. In an environment where time is perhaps one of the most valuable organisational commodities there is a persistent danger of it being directed to other important concerns. In real terms, time costs and is therefore highly prized.

However, finding ways to utilise the wealth of knowledge that currently resides in its people and systems is a persistent challenge. The issue can be less about creating time for learning, but rather finding ways of harnessing, releasing and utilising the learning that has already been invested in. For some, the difficulty can lie in linking off-the-job learning with the job itself, but for others it is about tapping into the learning that is in people's heads and sharing it across the organisation. One example of a way to make progress in this area is where people who participate in external courses present the core features of their new learning to relevant organisational members and indicate how they intend to use this new knowledge in their work.

Workplace learning is much more than formal training.

Making learning more visible

Often it is only when organisations are asked to comment on the quantity and quality of their learning effort that they begin to appreciate the level of learning that actually occurs within their organisation. As seen in the case studies, some organisations have taken steps to highlight the learning that occurs through, for example, placing a learning notice board in a prominent position accessible to all; issuing a learning and development newsletter highlighting all of the different learning activities occurring across the organisation; completing short memo-type reports of key learning events; making a library available for work-based learning; recognising special individual and organisational achievements that have a learning connection.

Small actions such as these serve to highlight the types of learning interventions that occur, but organisations must be consistent in promoting the kind of work they are doing and its attendant benefits, especially among strategic players. The latter is always problematic, especially where there is an imperative to derive some form of return-on-investment output measure, and more especially where the prevailing economic fortunes of the organisation are under pressure.

Integrating the range of work systems to facilitate learning

This challenge intersects all of those highlighted and integrates the full range of work systems with learning initiatives. The need for all organisational members to take responsibility for learning at work is critical. The small, ordinary, everyday work activities are equally as important as the 'big bang' formal training and development programmes.

What will make the difference will depend on the level of commitment across the entire organisation to harness the potential of formal and informal learning activities. Specifically, the network

members note that learning must be viewed as something far more than a service provided by an individual/department/group, and that learning subsumes and permeates all facets and systems of an organisation's infrastructure. Making learning more visible and integrating it with complementary HR systems may go some way towards meeting this core challenge into the future. Organisations need to use the language of learning, to 'shout about it' and make people aware of what constitutes learning at work. It is not only formal 'big budget' training, but also includes everyday informal on-the-job or experiential learning.

Learning becomes more valuable as everyone understands what it is about.

Engaging 'ambivalent' learners

While many organisations are making progress in different aspects of their learning effort, there remains considerable room for development. A critical issue concerns the need to motivate core groups of employees or staff who do not embrace the impetus for learning at work, as others may have. The challenge for organisations lies in 'selling' the benefits of learning and in finding ways to recognise positive learning behaviours. A good deal of self-motivation is also required to make learning effective and lasting. While organisations may make every effort to provide learning opportunities, individuals must be willing to participate in that learning effort. It cannot be forced on them. The most that can be achieved is to create an environment that promotes, encourages and actively supports learning initiatives.

Workplace learning must be highly visible for everybody in the organisation.

Ensuring managers take responsibility for learning

Just as there are ambivalent learners, there are also managers who do not appear to have a keen interest in facilitating the continuous development of the people they manage. It is clear that responsibility for learning must be shared between HR, managers and employees. Some progress can be made in this area through formalising personal development plans and the smooth operation of performance management systems. The attitude and behaviour of individual managers towards learning can have either a negative or a positive impact on the perception, take-up, follow-up actions and transfer of learning within the organisation. The critical role played by managers as influencers and facilitators of learning at individual and organisational level cannot be overstated.

Conclusion

This report and related material provides concrete examples of workplace learning and therefore removes some of the mystique attached to creating an environment where learning at work is valued by all organisational members. It is clear that the practices identified throughout the report represent a mixture of formal and informal systems and processes that can be introduced in organisations to act as both a generator and a reinforcer of learning at work. What is required, and evidenced in rhetoric if not reality, is committed leadership and dedication to ensure that the organisation as an entity is designed for and values learning in all its guises. As the members of this network attest, the challenge is difficult, but achievable.

Appendices

Appendix I

Members of the project steering group and practitioner network

Members of the project steering group

Cynthia Deane,
Learning and Development Consultant

Mary Fitzpatrick,
University of Limerick

Dr Noreen Heraty,
University of Limerick

Ian Hyland, FÁS

Dr Larry O’Connell, NCPP

Edna Jordan, NCPP

Members of the practitioner network

Trudi O’Sullivan	Fexco
Training Manager	Alpha*
Declan Hannigan	FÁS
Siobhan Ní Cheallaigh	ComReg
Monica Chawke	The Mespil Hotel
Sean Twohig	Jurys Doyle Hotel Group
Mick O’Dwyer	Dara Creative Communications
Mary Kelly	National Learning Network
Training Manager	TLEI*
Terry Agnew	The Courts Service
Colm Heffron	Filestores
Maeve McGee	Filestores
Brian O’Driscoll	GlaxoSmithKline Ireland
Tony Lenehan	Fáilte Ireland

* Not the organisation’s real name

Appendix II**Organisation learning activities questionnaire**

Q.1 (a) Does your company have a formal learning policy?

Yes No

(b) If yes, please give details.

Q.2 What level of priority is attached to learning in your company?

Q.3 Does your company have a specific budget for learning?

Yes No

Q.4 Who decides on the size of the learning budget?

Corporate or Head Office	<input type="checkbox"/>
Owner/manager	<input type="checkbox"/>
Board level within the company	<input type="checkbox"/>
Training/HR department	<input type="checkbox"/>
Individual department managers within the company	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Q.5 On average, how much money is spent on learning per individual?

Q.6 (a) On average, how many days learning/training does each individual receive per year?

(b) Has this changed over the past 12 months?

Increased

Decreased

Remained the same

Additional comments

Q.7 Who decides what learning is required?

Corporate or Head Office

Owner/manager

Board members/corporate HQ

Training/HR department

Individual departments within the company

Employees

Line managers

Other (please specify)

Q.8 (a) Are there any sections/units within your company that have embraced learning more fully than others?

Yes No

(b) If yes, please elaborate.

Q.9 Which, if any, of the following influence the type of learning undertaken? (Please choose the top three and rank in order of influence where 1=most influential, 2=next most influential and 3=next most influential)

- | | |
|--|--------------------------|
| To develop a reputation as a learning focused company | <input type="checkbox"/> |
| To facilitate the implementation of change | <input type="checkbox"/> |
| To introduce new technology | <input type="checkbox"/> |
| To meet statutory requirements | <input type="checkbox"/> |
| To facilitate the implementation of flexible work strategies | <input type="checkbox"/> |
| To communicate core business objectives | <input type="checkbox"/> |
| To improve the ability to attract good candidates | <input type="checkbox"/> |
| To secure and/or retain quality standards | <input type="checkbox"/> |
| To facilitate product innovation and/or development | <input type="checkbox"/> |
| To meet employees' career needs/demands for learning | <input type="checkbox"/> |
| To help create a shared vision of the company | <input type="checkbox"/> |
| To update existing skills | <input type="checkbox"/> |
| To introduce multi/cross-skilling | <input type="checkbox"/> |
| To introduce team working | <input type="checkbox"/> |
| To improve performance | <input type="checkbox"/> |
| To meet customer expectations | <input type="checkbox"/> |
| Other (Please specify) | <input type="checkbox"/> |

--

Q.10 (a) Do you formally identify learning needs?

Yes No

(b) If yes, which of the following do you use to identify learning needs?

- Performance management/appraisal review
- Peer review or 360° feedback
- Personal development plan
- Organisational training needs analysis
- Staff survey
- Other (please specify)
-

Q.11 What proportion of your overall learning activity is:

- Formal – on the job
- Formal – off the job
- Informal learning – on the job

Q.12 Which, if any, of the following learning activities does your company engage in? For each activity that you use, please indicate the percentage of your employees that has participated in it over the past 12 months?

	Used	% of employees that has participated in past 12 months
Externally accredited education programmes	<input type="checkbox"/>	<input type="text"/>
Computer based learning	<input type="checkbox"/>	<input type="text"/>
Coaching	<input type="checkbox"/>	<input type="text"/>
Mentoring	<input type="checkbox"/>	<input type="text"/>
Action learning	<input type="checkbox"/>	<input type="text"/>
Project teams	<input type="checkbox"/>	<input type="text"/>
Video based learning	<input type="checkbox"/>	<input type="text"/>
Conferences/seminars	<input type="checkbox"/>	<input type="text"/>
Distance learning	<input type="checkbox"/>	<input type="text"/>
E-learning	<input type="checkbox"/>	<input type="text"/>
Short courses	<input type="checkbox"/>	<input type="text"/>
Strategic/company alliances	<input type="checkbox"/>	<input type="text"/>
Visits to Head Office/sister companies	<input type="checkbox"/>	<input type="text"/>
Visits to customer/supplier sites	<input type="checkbox"/>	<input type="text"/>

Networking forums

Other (please specify)

Q.13 (a) Do you evaluate learning activities? If no, please go to question 13(d)

Yes No

(b) If yes, which of the following are used for collecting evaluation information?

Informal feedback from line managers (Please explain)

Informal feedback from employees (Please explain)

Formal feedback from line managers (Please explain)

Formal feedback from employees (Please explain)

(c) If you evaluate, which, if any, of the following do you use?

Total number of training days undertaken

Meeting the objectives set out in the training and development plan

Meeting objectives set out in the individual training needs analysis

Exam pass rates for certified/accredited programmes

Measured job performance immediately after learning

Measured job performance some months after learning

Improved promotability of employees

Other (please specify)

(d) If you do not evaluate learning, why is this?

Q.14 How do you know whether you are getting added value from your investment in learning?

Q.15 What industry do you operate in?

Q.16

(a) Excluding purely seasonal fluctuations, would you say that your business over recent months has:

Increased

Remained unchanged

Decreased

(b) Excluding purely seasonal fluctuations, do you expect that your level of business during the next few months will:

Increase

Remain unchanged

Decrease

Appendix III

Guiding questions for one-to-one interviews with network members

1. Do you have any follow-up strategies to learning events? If so, what are they?
2. What kinds of things do you associate with learning at work?
 - a) What is learning primarily used for in your company?
 - b) Would you like this to change?
3. Have you sought feedback on how others within your company view learning at work? What have you found?
4. What benefits do you think are associated with learning at work?
5. How do you think people can learn at work?
6. How do you ensure people are given opportunities to use new learning?
7. How do you encourage people to share knowledge and information at work?
8. What kinds of things prevent learning in your company (i.e. Are there specific barriers to learning that you can identify?)
9. How do you create space for learning?
10. Do you think learning at work is rewarded in this company? How?
11. Can you identify particular issues that your company faces where learning could play a key role?
12. How is new knowledge brought back into the job? Can this be done?
13. Do you have a company intranet? Is this used to highlight different career paths/job opportunities within the company?
14. Have you formed any learning alliances or networks with other companies in your line of business?
15. How often do you review the kinds of learning and development activities you provide?
 - a) Is change a regular feature within your company?
 - b) Do you think it is well managed?
 - c) Where do improvements need to be made?

Appendix IV

Guiding questions for onsite focus group discussions in participating organisations

- What is the learning culture of this organisation?
- What is learning?
- What do you understand by the term 'learning'?
- What activities do you associate with learning?
- What are the barriers to learning?
- Who is responsible for your learning?
- Who identifies the need for learning?
- How can we improve learning within the organisation?

Appendix V

Guiding principles and framework for individual action learning projects

Drawing on the principles of action learning the project has three main elements:

1. Analysis
2. Action
3. Assessment of impact.

1. Analysis

- Take stock of current reality: initial analysis
- Is there a need/desire for change?
- What is your concern/issue/research question?
- What outcome would you like to achieve? Have you specific goals?
- What information or data do you need to gather to help you (and others) to understand the issue better?
- What 'baseline data' do you need to have so that you can monitor the impact of your action? (Data set 1).

2. Action

- Reflect on findings of the initial research: identify gaps, needs, goals, targets
- Identify appropriate actions: 'intervention strategy'
- How will you measure success?
- Implement actions and document the process
- Gather and analyse data (Data set 2).

3. Assessment of impact

- Monitor and measure outcomes/results
- Collect evidence of impact (Compare data set 1/data set 2)
- Evaluate the process and the results
- Prepare report.

Task/Objective**(WHAT you need to achieve)****Resources****(HOW you will approach it: who will be involved, when, what supports you need)****1. Take stock of current reality**

2. Identify need for change

3. Identify your concern

4. Set goals

5. Collect data set 1

Case Studies

**Building Learning
Organisations
through Networking**

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Organisations
through Networking**

Case studies

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1

FEXCO

Organisational profile

FEXCO, a privately owned company based in Killorglin, Co Kerry, is a provider of global payment services and processing. There are three core product groups: global corporate payments, global consumer payments, and business services, which process millions of international payment transactions annually.

FEXCO was set up in 1981 to operate bureau de change facilities throughout Ireland. Since then, FEXCO has become a multifaceted company processing global payments through many individual products. These include the operation of Western Union Money Transfer, dynamic currency conversion, stockbroking, VAT refunds, call centres, international corporate payments, and travel related services. The company has operations in Ireland, the UK, Spain, Malta, Australia, USA and Dubai. In recent times business has increased and is forecast to continue to do so. There are 785 employees in FEXCO

Killorglin with this figure set to increase over the coming year.

FEXCO does not have a formal learning policy (due to the fact that the HR manager was only appointed two and a half years ago) but would regard learning as a high priority within the organisation, and the development of a learning culture within FEXCO is very much in evidence.

It's all about improving the way we work – improving how we do things.

For the most part, the staff appear to be very positive about learning as there was a serious lack of any formal initiatives in the past, as the training manager reflects:

They will all tell you that there was such a hunger there for training that they just lapped it up. Couldn't get enough of it at the time – 30 out of the 32 top managers completed a university Diploma in Management accredited by ICM.

...it very much depends on the business manager, someone who always promotes learning as a way of bettering yourself both personally and professionally. S/he will encourage people to do courses and so they are open to doing training. You will have other departments who ask 'what have I done that I am doing this? Why am I doing this course?'

Newer, more dynamic units are generally staffed by people educated to a higher level and so are more open to learning, but regard it as time consuming. These comments from the focus group are quite telling:

Some divisions are learning at an enormous rate and others not learning at the same rate at all. Some people are more open to learning or adapt to new ideas and learn from previous experience.

Learning activities

A number of methods are used to identify learning needs, including:

- Organisational training needs analysis
- Performance appraisal review
- Personal development plans.

These culminate in the business unit manager discussing needs/issues with staff and passing the requests to the training and development (T&D) unit to link with overall business needs. The overall plan is published as the annual training plan.

Depending on the business unit, learning is categorised as formal learning on the job (30%), formal off-the-job learning (10%), and informal on-the-job learning (60%). The training manager considers that informal learning happens to a great extent, but it is unrecorded:

To my mind a huge amount of learning happens on the job but haphazardly so. I don't know how. It is by osmosis half the time.

There is a huge variety of learning activities in FEXCO (see table below) and in addition to those listed, the focus group considers that much informal learning occurs when meeting new people, working with new situations and problem solving.

Learning event	Percentage of participating employees in 2003 (%)
Externally accredited education programmes	11
Computer-based learning	11
Coaching	100
Mentoring	9
Action learning	76
Project teams	100
Conferences/seminars	44
Distance learning	1
Short courses	63

In addition, FEXCO has strategic alliances with local educational establishments and networking forums with FÁS, IBEC, CIPD and KY Marketing. There are also opportunities to visit sister companies abroad and customer sites.

One training event that has been established over the past 12 months is a customised Diploma in Management Development, which is accredited by the ICM. This has been run once in the UK and 32 managers in Killorglin have also completed the programme. There has been very positive feedback resulting from the programme. The group in question were mainly promoted from within and never received any formal management training prior to this.

Evaluation and return on investment

Learning activities are evaluated through both formal and informal feedback to and from the line managers. Informal feedback from the employees is facilitated through emails and word of mouth. Evaluation sheets are also used at the end of a learning event. In general, arrangements for formal and informal feedback from the line managers is an area seen to need improvement. However, the formal methods of evaluation employed include the following:

- Total number of training days undertaken
- Meeting the objectives set out in T&D plan
- Meeting objectives set out in the individual TNA
- Exam pass rates for certified/accredited programmes.

The focus group commented that negative feedback is more readily provided than positive feedback and that a structured review needs to be introduced in order to provide company feedback:

The managers will comment on the one call you did badly rather than the calls you did well.

In relation to return on investment in learning, this is not formally evaluated. The HR manager comments that 'honestly, we don't know'. However, this is an area that will be improved in the future. Nevertheless, the focus group considers the following benefits to be added value from learning:

- Self-confidence/knowledge to do the job and to apply for inhouse promotions.
- Opportunities in company/in career progress itself by drawing on learning in the past.
- Sense of achievement or success.
- If employees hadn't learnt or developed, FEXCO wouldn't have developed to what it is today. Management have changed their thinking and are now recognising the value of employee knowledge and expertise.
- Biggest resource is people and technology. 'We don't know what we have under the roof here in terms of untapped skills base, expertise and knowledge.'

Learning priorities

FEXCO is one of the largest employers in Co Kerry and is growing at an enormous rate. At present the HR director, a training manager and an administrator manage training within the organisation. At time of writing the organisation is preparing for an audit for accreditation in ETP.¹ Due to the level of commitment required for this task, the training manager is developing a training team consisting of one person from each business unit who will

adopt the role of training champion in their own area. These 16 individuals will complete 12 days training over six months on four key modules:

- Train the trainer
- Induction
- On-the-job training
- Excellence Through People.

The training champion will support and drive ETP and related issues in the business unit. The training manager is hoping that this network will be developed as an integral part of the organisation over the course of six months and will assist in a proactive approach to promoting learning in the organisation:

The training champions will get to know each other through this course I can hold a meeting (with them) once a month to discuss the training issues ... driving it rather than coming from behind.

However, there seems to be mixed reaction to the role of training champion in terms of the feedback received to date, as the training manager reflects:

Some people see it negatively — what did I do that I ended up on this course Others see it as fabulous — think it is a fabulous idea, think it is brilliant and are one hundred per cent behind the whole thing.

Within FEXCO, an employee assistance programme is available, which is a free phone service open to all staff who may have issues or concerns that they wish to discuss. This is a confidential national service paid for by FEXCO and run by a group of psychologists within the region. Should an employee require more help than just a call, there is a provision for the individual to visit the psychologist on appointment.

Finally, the educational assistance scheme that exists in FEXCO has had only 14 applications in the past 12 months. The question must be raised as to why the take-up is so low. A representative comment at the focus group was that a lack of communication can be a barrier to learning at work, particularly in relation to the lack of communication about inter-company information.

¹ FEXCO received the ETP award in Sept 2004

While cross-training is an aspiration among the various business units, time is considered the main barrier to this becoming a reality, as a business manager reflects:

If cross-training is to work we need extra staff, a lot of resources and time. We had a plan today to cross-train in another line but it was very difficult to stick to it when one staff member called in sick.

FEXCO Building the capacity of training champions

I sought to use the FÁS Excellence Through People (ETP) process to drive change and development in a large organisation that had grown into 10 separate business areas, where many of the staff had developed within the business with no formal development plans or organisation design.

In order to meet the requirements for the ETP award in the time frame required, I identified the need for training champions in each business unit. The training champion would be a key member of staff capable of learning how to identify, develop and deliver on identified training needs in support of business unit objectives. The role of the training champion was to:

- Identify business unit training needs
- Link business unit training needs to the business unit/company business plan
- Develop a business unit training plan and training objectives
- Manage the achievement of the business unit training plan objectives
- Support the business unit in the development of the training and development function.

A six-month ETP development programme was designed to equip the training champions with the knowledge and skills associated with learning and development best practice and the requirements for preparation, assessment, administration and ultimate achievement of the ETP award for their business unit.

The project was a great success, resulting in the achievement of the ETP award in September 2004. In addition, we set up a team of 16 accredited training champions across the company, and they developed and designed a company-wide induction programme that was launched in July 2004. The project also improved the overall effectiveness and reach of the HR/training function. We improved skill transfer within the organisation, improved the effectiveness and quality of on-the-job training programmes, improved the capacity for organisational learning, and increased the organisation's ability to retain staff.

The training champions team became the embodiment of the organisational role model. The ETP development programme supported and enabled the training champions to design, deliver, develop, manage and evaluate induction and on the job development within the company.

To date this model has been a success for the organisation and enables me to create a tangible link between group/business unit strategy and training and development design and delivery. The challenge is to embed a shared-learning culture within the company in the coming two years.

Using an action learning approach for this project was invaluable as it prompted me to ask questions of the learning I sought to 'impose' on the company. The exercise was also extremely beneficial to me as the newly appointed T&D manager. It helped me to get to know and understand the company business functions, the management and staff, the company culture, and the expectations and issues that I would need to address in the future from a training and development perspective.

2

Alpha*

Organisational profile

Alpha is a subsidiary of a Canadian diversified company, operating in 54 facilities in 12 countries throughout North America, Europe and Asia. With 16,500 associates in the US, Austria, Canada, France, Germany, India, Ireland, Mexico, the Netherlands, the Philippines, Spain and the UK, the organisation serves customers in 16 languages and dialects. Alpha in Ireland is based in Swords, Co Dublin and employs 400 people onsite with a huge increase experienced over the past few months.

Alpha is a global infrastructure service company focused on managing each stage of a customer's experience. They provide and integrate a full suite of customer management services for their clients, allowing them to maximize their customer relationships through a single service provider.

There is a medium priority attached to learning within the organisation, which was reflected in the appointment of a global training director in recent years. However, while the organisation is very clear on its values and mission statement, there is no explicit learning policy. Nevertheless, there is a specific learning budget which is decided by head office and this is requested by the Dublin office. Each individual receives up to 12 days training per year and this remains constant with a focus on company orientation, customer care and technical/product training for new hires. The solution delivery director comments that Dublin is regarded as doing more training than most of the other Alpha sites.

*Not the organisation's real name

Key drivers of learning

The main influences that impact on the type of learning undertaken within the organisation are prioritised as:

- Meeting statutory requirements (directives)
- Meeting customer expectations
- Developing minimum skill sets
- Developing a shared vision of the company.

A number of directives originate from head office that are in response to client needs and expectations. Responding to these client needs requires all employees to develop a minimum skill set. The shared vision of the company is considered an important influence on learning in so far as it is considered vital that all employees know and live the values of the organisation. Many soft skill training courses are in place so that the employees can live the values in order to support the corporate culture. While training is regarded as important by the employees, it is not the top priority due to the demands of the service level agreements under which they work. However, employees in the focus group identified the following enablers of learning:

Communication

- Communication with the team (using someone as a guide)
- Sharing result of escalation procedure
- Assisted in team development
- Feedback — usually given when things go wrong — it would be good to also get positive feedback
- Documentation-service manual may not apply directly to problem but can work from it
- Ease of access to information
- User friendly tools in a central location
- Specific details provided
- Offsetting failure in the future
- Freedom to experiment – use of crash PC to try different systems.

Recognition

- Reward or qualification or certification
- Personal satisfaction and learning for learning's sake.

Teamwork

- Learning from those with knowledge in the team
- Social events
- Finding your own advisor in the organisation – you know how others respond to situations
- Supporting weak people – you know the people who will give you the time.

Type of work

- Solving the same problems daily can lead to a pattern or trend that can have both positive and negative consequences for staff. For example, they will be able to troubleshoot quite easily but there is also the potential for technical people to become disinterested in the job as they become accustomed to the problems. Liking the job and/or using tests to establish competency can be useful in overcoming these issues.

Learning activities

The organisation's learning requirements are decided by the training manager at site level through a training needs analysis incorporating a number of sources. This relies on employees completing a form online, which includes the following headings:

- Organisational changes
- Client requests
- System changes
- Metrics
- Monitoring issues
- Agent requests.

Each client account also has a training needs matrix. This is agreed with the client in advance in terms of what training is needed to support the product side of things, whereas the identification of training for soft skills needs come from the team either on a formal or an informal basis.

Three other methods are used to identify training needs:

- Performance management
- Staff survey
- 360-degree feedback (on some issues).

The recent staff satisfaction survey that was completed in the Irish Alpha site was also implemented globally right across the organisation. Arising from this process, a consultation strategy is now in place whereby each team is consulted by their manager on key issues and possible solutions. Representatives from each team meet and discuss the top 30 issues and possible actions, and this is updated on a regular basis. The responsibility for these issues and possible actions are then allocated to the appropriate departments and individuals who must follow through on actions or provide reasons why a particular issue cannot be addressed. The action list is updated, taking account of what is and is not happening, and circulated again.

Sixty per cent of the learning in Alpha is formal and off-the-job. On-the-job formal and informal learning each account for 20 per cent of the learning activities. With respect to formal learning off-the-job, most of this is accounted for by the induction process. It is the training manager's intention to promote coaching as an alternative to the formal classroom type training.

I am trying to promote coaching for people ... to improve performance through coaching and not send the employees back to the classroom environment, as it may be the easiest option but not always the right option.

The types of learning activities that take place are as follows:

Learning event	Percentage of participating employees in past 12 month (%)
Externally accredited education programmes	10
Computer-based learning	27
Coaching	70
Mentoring	10
Action learning	20
Video-based learning	75
Conferences/seminars	3
Visits to sister companies	1
Short courses	15
Internal networking forums	2

In addition to learning events listed above, optional language classes are also provided outside working hours. As the contact centre boasts of a multilingual workforce, the organisation values and uses the expertise of its employees, providing opportunities for employees to run these classes.

We pay people from the different account departments in the company ... We are multilingual so the employees deliver the language classes. The numbers are small in each class but if we decided to cancel them there would be uproar.

Due to the success of this initiative, the training manager is also considering providing extra technical courses that are not 'need to have's' outside of working hours.

Alpha employees perceive learning as development. They identify formal learning as procedures, and training and informal learning as on-the-job experience, dealing with customers, learning from their own mistakes and from the mistakes of others. In relation to the responsibility for learning, the general consensus among members of the focus group is that the individual employee is responsible for their own learning, with support from the organisation

and immediate manager, as these representative comments from the focus group indicate:

I am responsible for my own learning and I learn from my peers in other branches or sites through quarterly meetings and once a week on the phone.... If you don't want to learn, you won't, even if the facilities are there.

While it is agreed that learning is the responsibility of the individual, the following comment highlights the need for organisational support:

The company needs to provide information tools and training and skills in order for me to learn. I want to learn but someone needs to teach me.

The focus group also identified the need for a driver for learning within the organisation in order to ensure follow-up to the training and learning that occurs. While Alpha is regarded as a learning organisation there still remains room for improvement. Whilst the tools are there for learning, time is a key barrier, as this representative comment from a team manager who participated in the focus group demonstrates:

I don't have a minute to attend formal learning.... We need to learn through our peers and we need to upskill and allow more time for courses.

As a result of the rigorous induction training, the focus group reflected that no fear or pressure of failure exists because there is freedom to experiment, which they regard as positive for learning.

Evaluation and return on investment

Evaluation occurs through formal and informal two-way feedback from manager to employee. The initial training plan is based on a minimum skill-set requirement and is quite a flexible tool in terms of the training schedule. This is developed over time due to the reactive nature of the business and movement within the company. As a result the training manager maintains that the initial training plan is not the most reliable record for evaluation, thus making it difficult to evaluate.

I have to reschedule my training plan every week. The initial training plan is the minimum skill set. There is also a global one that sets the major training initiatives for the year.

Exam pass rates and measured job performance are two measures used to evaluate the effectiveness of training and learning interventions. All technical and soft skill training completed is examined by means of an assignment or test. The induction or new hire process is quite rigorous and involves monitoring calls to test the new employee before they go live:

Three test calls have to be monitored with a test at the end ... customer care skills are also monitored in monitoring a call. If they don't pass one of those they have to be monitored five more times – all part of the standard.

There is also an ongoing monitoring process in place with three calls being monitored per employee per month. The purpose of this procedure is to provide ongoing feedback to the team members, yet this does not appear to be the key focus. The training manager views this as a priority going forward as there needs to be a greater emphasis on the feedback in order to improve evaluation:

They are concentrating on monitoring to satisfy quality standards but they should not be focusing on monitoring but on monitoring and feedback – they go together.

Job performance after training is also measured in terms of metrics, key performance indicators, number of calls and average handling time. However, the team manager of the client account completes this measurement. There has been no formal investigation of return on investment in training/learning. However, it is recognised that improved performance and increased staff satisfaction result from training.

Learning priorities

Alpha uses a variety of training methods such as role plays and monitoring 'live' calls to identify training and learning needs. However, there is some concern that the monitoring process, targets and the team service level agreements, while important, are adding to work pressure. This may be having a negative impact on the quality.

ALPHA Developing leadership skills

In late 2003, we focused on the development of our product specialists, who train and support new and existing team members, monitor quality and act as the first point of contact in relation to difficult technical queries. People management skills were seen as vital for effective management and support of the team. A people management development programme (Foundations of Leadership) was applied to this target group. The goals were to improve their confidence, to improve their understanding of their role, and to give them the skills to develop others.

The Foundations of Leadership programme was scheduled for formal delivery over three full days. The programme consisted of a set of short, interactive modules with a high focus on application supported by realistic scenarios and role plays.

During the formal training, product specialists were asked to record the main learning points from each module and how they wished to apply them. These personal action plans were designed to be used to track application of learning by the product specialist him/herself and supported by his/her team manager.

Over the period of the project, improvements have been tracked in the number of calls monitored by product specialists, and in the level of employee satisfaction within the team. On a qualitative level, the following observations have been made by the team's solution delivery manager:

- Team attendance and punctuality in general have improved
- There is now an improved transfer of skills through the team
- Service level targets are being achieved

- Product specialists have gained the respect of the other team members
- Product specialists have a much clearer understanding of their role and the expectations of them
- Product specialists are now more objective, assertive and professional in their dealings with their colleagues
- Positive feedback has been volunteered from team members on the approachability of their product specialists
- Product specialists are happier in their role and are showing much more initiative
- There has not been any attrition of product specialists in this period
- There is genuine team spirit within the team.

The success of the project was primarily due to the follow-up carried out by the solution delivery manager and team managers. The follow-up itself might not have been successful had it not been for the commitment of the solution delivery manager who ensured follow-up took place and was involved herself from the beginning.

The very action taken by this section of management provided opportunities to demonstrate and reinforce the learning points addressed through Foundations of Leadership. This action linked the formal training with the product specialists' own development.

This project can now be used to demonstrate to others in the organisation how formal training can be enhanced and evaluated through line management follow-up.

3

FÁS

Organisational profile

FÁS, the State Training and Employment Authority, was established in January 1988 to provide a wide range of services to the labour market in Ireland. Its functions as laid down in the Labour Services Act 1987 are:

- Training and re-training
- Designated apprenticeships
- Recruitment service
- Employment schemes
- Placement and guidance services
- Assistance to community groups

Advice for people returning to Ireland and those seeking employment elsewhere in the European Union (EU).

The statutory functions of the organisation also include the collection and publication of information relating to the labour market and the provision, to the Minister (of Enterprise, Trade and Employment), of information, research and reports on matters within FÁS remit. FÁS activities are funded by the Irish Government, the National Training Fund and the EU.

FÁS employs 2,391 people and it is predicted that this number will decrease by 150 over the next 12 months as a result of the government recruitment embargo. The female participation in the workplace is 51 per cent.

The commitment to learning and development within FÁS is evidenced in its formal learning policy which supports a culture of ongoing development for its employees and is committed to lifelong learning. It aims to promote business-related learning in a fair, transparent and cost-effective manner in line with the strategic needs of the

organisation. The policy covers a number of initiatives in relation to on-the-job training, own-time study and formal training.

In line with this, the company has a specific budget for learning, which is decided by the executive board within the organisation. Four per cent of FÁS payroll is spent on staff development. The amount of training received per individual depends very much on learning needs but can vary depending on the initiative.

Key drivers of learning

As the State training and employment authority, a high level of importance is placed on learning and all departments are required to treat learning as a priority. Individual departments within the organisation decide what type of learning is required in conjunction with line management and staff, and this must be considered in line with meeting the objectives of the individual business plans. Learning is influenced by the following three main drivers:

- To facilitate the implementation of change
- To facilitate the implementation of flexible work strategies
- To meet customer expectations.

These three drivers are interlinked to a great extent. One example of the forthcoming change is the reduction in staff by 150 people. This means that the organisation is going to have to redeploy people and is striving to develop a flexible environment. The HR director surmises:

We see the need to maximise our staff utilisation We feel we have quite a lot done with regard to work/life balance and we, as employers, are quite flexible. However, when we seek flexibility from our staff, it is not always forthcoming.

From the employees' viewpoint learning is driven through three main stakeholders: the organisation, internal and external clients, and the individual employees themselves. Learning is recognised as playing a pivotal role in FÁS and reflected in performance on the job. For the clients, both internal and external, learning is vital in relation to improved performance, proficiency and professionalism due to increased confidence of staff.

Learning activities

Learning needs are formally identified using three main methods: performance management or appraisal, personal development plan and staff survey. Currently performance management is used for identifying learning needs at senior level.

While training plans are developed every year there is a tendency to steer away from 'soft skills' and focus on technical and computer skills. This is a weakness identified by the HR director:

We are developing a suite of FÁS soft skills – the reason we are putting that into our business plan for next year is that we have identified it as a weakness. There was a range of programmes years ago but as times got tougher they were not regarded as priority.

However, there is a new module called 'Employability' that is being developed, which focuses on all of the soft skills – anything that is non-technical. It is intended that this module will be provided across the board for all FÁS staff.

In addition the Excellence Through People standard allows for training and development to be tied into the business needs of the department and then tied into organisational needs. Nonetheless, if there is an additional learning need/desire that is relevant to the job, time and support will be given to do it.

It is recognised by staff that the organisation is changing and evolving and so 'is supportive in what employees want to do'. However, while the organisation is supportive the individual is ultimately held responsible for his or her own learning. The priorities of the organisational development unit change in response to internal and external pressures.

There are a number of learning activities outlined in the learning policy such as induction, mentoring, coaching and work-shadowing. There are also guidelines for study leave for formal learning initiatives. The learning events that occur within FÁS include the following:

Learning event
Externally accredited education programmes
Computer-based learning
Coaching
Mentoring
Action learning
Project teams
Conferences/seminars
Distance learning
Short courses
Strategic/company alliances
Visits to head office/sister companies
Networking forums

It is recognised that the externally accredited programmes account for a huge proportion of the learning that occurs in FÁS, and there is a very strong focus on this when learning is discussed. There is a huge variety of courses organised on behalf of FÁS by NUI Galway and NUI Maynooth, e.g.

- MA in Education and Training
- Certificate in World Class Standards
- Diploma in Adult Guidance and Counselling.

These are mostly organised by NUI Galway but all programmes are developed in association with FÁS. They are designed to meet the competencies that employees need to have and develop in the organisation:

We have quite a sophisticated approach here because we facilitate individuals who want to learn and can effectively go up to PhD level — in terms of doing a primary degree, or doing a masters degree. It is not uncommon to come across people with PhD qualifications within the organisation who have secured these qualifications and development since they came into FÁS.

The standard of qualifications in FÁS is very high but as the HR director comments this creates its own problems:

Our difficulty may be that we do not rotate as much as we should – people are academically developed but not getting the opportunity to use those academic qualifications. It is one of our biggest challenges.

There is central staff development within FÁS whereby various topics of interest are discussed in workplace panels. Unfortunately, these are not regarded by staff as development:

We have strategic workshops which we regard as opportunities to learn and develop, whereas the people who attend them nearly have to think twice before deciding to participate.... The plan itself at the centre is fine but it is when it gets out, particularly when it goes out to 60 different locations, the message gets distorted as it goes out.

In light of the above, the career development initiative, introduced by FÁS as a pilot, strives to assess why some staff have not availed of development opportunities. It is aimed at those with more than five years service. The initiative comprises opportunities to rotate jobs and a formal Open University accredited programme.

Evaluation and return on investment

Learning activities are evaluated through formal feedback from line managers and employees. It is perceived that much of the content of the feedback reflects people getting issues out in the open or, as the HR practitioner states, 'off their chest'. Due to the implementation of ETP, a mechanism was introduced that facilitates two-way feedback in relation to development. However, this is regarded as a small step in terms of what needs to be done. Other methods used to evaluate include:

- Total number of training days undertaken
- Meeting objectives set out in the T&D plan
- Meeting objectives set out in individual TNA.

Due to the focus on formal off-the job-learning, particularly in terms of academic-accredited programmes, it is considerably easier to evaluate assessments and projects. However, there is no real system of evaluation in place to evaluate the soft skills of informal learning.

While there is no formal guarantee that rewards will be forthcoming on gaining a qualification, the result is that when it comes to promotion, individuals will be competing against increasingly qualified groups. In light of this, a performance management development system is being developed for roll-out to the organisation by the end of the year.

A key area of improvement identified by the focus group relates to pre-course assessment forms. While these are used before courses they would be regarded as much more beneficial if 'they were used to group various levels (roles and experience) together and used to (influence) the design of the course'.

The focus group was very positive about learning in the organisation on the whole. The participants consider certification as an important factor influencing learners, but just as important is the opportunity to put the new information, knowledge and skills into practice.

Improvement in personal confidence was also regarded as very important in line with improved performance and professionalism. Other factors mentioned by staff that encourage people to get involved in learning experiences included the availability of inhouse courses, group work, and the delivery style and attitude of the training instructor.

One factor that was raised as important was the time allowed for learning during working hours. One learner referred to a course that was provided during working hours:

It was my first time as a lifelong learner doing learning by day and not at night. This was useful for networking and asking questions of others after the programme: networking was excellent after the course.

Learning priorities

FÁS was accredited with ETP and as a result has developed a number of systems and structures relating to learning at work. FÁS is currently implementing a core system for learning. This has resulted in a great deal of new and exciting initiatives in FÁS Head Office, such as the Career Development Programme and the Employability module.

FÁS Career development and succession planning

The Career Development Programme (CDP) was introduced on a pilot basis in 2003 as a way of ensuring succession planning for management grades. It aims to equip suitable people with the skills necessary to go forward for management positions in the future. The criteria for participating in the programme are five years' service and no previous certified management qualifications.

The Open University provided the academic element of the CDP. The Certificate in Professional Management, which is a four-module programme, is awarded to those who successfully complete the programme.

The in-house element of the programme consists of the participants moving into a different functional area and carrying out a project which is central to their development and of organisational value. This would be facilitated using coaches and mentors.

During 2004, we completed a status report of how the programme was progressing from the participants' point of view. We conducted individual interviews in March 2004, and issued a questionnaire to participants in June 2004. Feedback from the interviews provided important learning for the organisation about the barriers experienced by the participants in the programme. These included communication problems with new managers; a sense of 'begrudgery' among new work colleagues; a sense of isolation experienced by participants; a perceived lack of support; 'backfill' problems; and a lack of co-ordination.

Each participant had a coach (usually their new manager) and a mentor (usually a director), who

would drive and advise on their work. The results of the questionnaire three months later were very positive and reflected a group of people working successfully in their new areas. The sense of isolation had disappeared and there was a feeling that managers had now bought into the programme as mentors.

When the Career Development Programme was first discussed, the energy of the steering committee was focused towards the structure of a work-based/academic programme for staff of certain grades. When the programme was rolled out it became clear that not enough communication had taken place regionally or locally. It was also clear that the managers and directors needed more than information, they needed knowledge and training around the programme. As a result large gaps appeared in the programme around the role of managers and directors, training of coaches and mentors, and buy-in locally.

In future, we will be in a position to address these issues (methods of communication and the participants' feeling of isolation) and as such the training process should be smoother and more effective. The overall learning from this programme so far can be summed up in three words

Communication, communication, communication

The learning curve for the staff development department has been steep, demanding but very valuable. To evaluate our programme with an external focus has been a very positive experience. We have learned from it and look forward to participating in similar projects in the future.

4

ComReg

Organisational profile

The Commission for Communications Regulation (ComReg) is the statutory body responsible for the regulation of the electronic communications and the postal sectors. The organisation was established in December 2002 under the Communications Regulation Act 2002, replacing the Office of the Director of Telecommunications Regulation (ODTR) which had been established in 1997.

ComReg is a professional services organisation comprising 120 staff members from a range of professions, including engineers, accountants, lawyers, economists and business analysts. It is the National Regulatory Authority (NRA) for the electronic communications market, which means that it is responsible for the effective implementation of the EU programme of communications liberalisation in Ireland.

ComReg has a range of obligations set out in both European and Irish legislation. In terms of electronic communication services, ComReg is obliged to promote competition in the provision of such services, to contribute to the development of the internal market and to promote the interests of citizens. The organisation's key objective for the postal sector is to promote the development of the sector, particularly the availability of a universal postal service within, to and from the State at an affordable price for the benefit of all users.

ComReg introduced a formal learning system over three years ago. Three policies form the basis of the framework used to encompass all learning activity in the organisation, and these are:

- Training and development policy — 'Take responsibility for your career'
- Educational assistance policy
- Induction policy.

An important assumption under which training and development operates within the organisation is that staff take responsibility — albeit partially — for their own learning in partnership with his/her direct manager. This assumption is based on the organisation's philosophy that the staff member's primary work relationship is with his/her direct manager. It is expected that each individual with his/her manager manages his/her performance and development, using the well-established performance management and personal development planning systems.

The training and development policy outlines three formal categories of learning that each staff member has access to during his/her career with the organisation. These are:

1. Continuing professional development (CPD):

The planned acquisition of knowledge, experience and skills and the development of the personal qualities necessary for proper execution of professional and technical duties.

2. Discretionary training: Includes a wide range of courses and conferences that will enhance an individual's professional and personal skills.

3. Educational assistance: The system under which the organisation sponsors individuals to further their educational standard by attaining job-associated academic qualifications.

ComReg was awarded the IITD National Training Award in 2002 and 2004 by the Irish Institute of Training and Development, and has maintained the Excellence Through People Award since 2002. In addition, in 2004 the organisation was successful in attaining the Institution of Engineers of Ireland (IEI) CPD Accreditation Programme, as well as the Approved Employer Programme of the Association of Chartered Certified Accountants (ACCA). ComReg considers that such awards recognise the training and development systems ComReg has in place for its staff.

In recent times the organisation has increased its emphasis and support for CPD, including actively encouraging its staff to become members of professional institutions and related networks. ComReg's intranet is used to support these activities by facilitating individuals to include their CPD activities as part of their overall training and development record. The HR director anticipates this emphasis on continuing professional development activity will increase into the future.

Key drivers for learning

ComReg's operating environment is dynamic and fast moving where a strong culture of delivery prevails. It is recognised that, as a leading-edge, multidisciplinary, team-based organisation, staff need to continuously develop and update their skills and qualifications.

The training and development of staff is an integral element in the human resource management process ensuring that staff acquire and enhance the skills required to fulfil their current role and prepare them for their future roles. In support of these objectives, the organisation makes a clear annual statement of financial investment and time commitment to support the development of staff, which is available depending on business and individual needs. This is critical in assisting the organisation to realise its purpose and vision and to reinforce its values of integrity, impartiality, professionalism, transparency and effectiveness. The training manager comments:

The needs of the business fundamentally drive staff to continuously learn and develop. This in itself creates an organisational culture favourably disposed to all types of learning and developmental activity.

Finally, it is recognised that a key driver for learning is the individual. All matters related to personal training and development are considered part of the overall performance management and personal development processes. While the organisation provides support and encouragement to staff, it is the clear responsibility of the individual to actively participate in these processes.

Learning activities

As learning/training is concerned with bridging the gap between the individual and organisational competencies, the organisation requires up-to-date information concerning the knowledge and skills deficit of staff throughout the office.

Training needs analysis is a systematic and comprehensive process which assesses the business goals of the organisation, determines the training needs required to achieve those goals and decides the training priorities which will make the greatest contribution to the organisation. Needs are identified through a range of processes, some of which are outlined here:

- Review of consolidated data from the annual performance review and personal development planning processes
- Consultation with staff representative groups
- Interviews and discussions with line management
- Focus group sessions with cross-sections of staff from all levels
- Attitude survey(s)
- HR briefings.

There is a wide variety of learning activity available to all staff at varying stages in their career with ComReg. The following table gives a broad indication of how training and development activity breaks down:

Training type	Percentage (approx.) (%)
Further education/ exam fees	25
External trainers	20
Other – conferences	20
Internally produced training courses	15
Training organisations (offsite training)	10
E-learning	5
Resources (equipment, hardware, etc.)	5
Total	100

In addition, the importance and benefits of the high levels of informal learning and coaching that occur throughout ComReg is well recognised. According to the training manager:

Staff are very willing to share their knowledge, so at times when it can be difficult to find the perfect training solution to a learning gap, it often makes sense to look internally and see how more skilled members of the organisation can assist in the development of others.

Evaluation and return on investment

Evaluation of learning in ComReg can be categorised into four levels, using the Kirkpatrick model:

- Level 1: Evaluating Reaction
- Level 2: Evaluating Learning
- Level 3: Evaluating Behaviour
- Level 4: Evaluating Results.

The first level seeks to determine the reaction of the participants and evaluates the degree to which participants valued the learning experience, usually through the use of assessment sheets/evaluation forms at the end of a learning activity. The second level assesses the degree to which participants have achieved the learning objectives established prior to participation on a learning activity.

The third level assesses the extent to which participants have transferred the skills and knowledge acquired on a training/learning activity to their jobs. This can be done formally through tests/exams or informally by observation. Level four evaluation is a cost—benefit analysis to assess the overall effectiveness of the training event on the wider organisation, in areas such as monetary impact, effect on efficiency and impact on teamwork.

The following specific measures are used to evaluate learning activity in ComReg:

- Post-training evaluation, which demonstrates sustained enhanced capability
- Quantification of current skills/competence levels across the organisation and measurement of uplift
- Ability to demonstrate the link between training interventions and enhanced staff capability and improved staff/business performance
- Utilisation of an agreed personal development plan for individual staff members, which reflects their own personal and ComReg's learning requirements
- Identification and achievement of benchmark standards
- Increased investment in training and development, based on proven success.

ComReg's training and development function is very systematic in its approach to gathering and sharing information and feedback in relation to all training activity. The training manager meets with division directors to review training needs and programmes on a quarterly basis. The output of these meetings forms the basis of organisational and divisional training plans which are generated twice a year. Information is gathered in a variety of methods, including course evaluations, focus groups, feedback reports and formal '1:1' interviews.

Feedback reports on training interventions are submitted to the HR director who is responsible for ensuring that ComReg's weekly operational meetings are kept up-to-date on all training activity. Individual feedback sheets are filed in

individual training and development files. The training manager actively encourages open communication and feedback:

While ComReg employees are not shy about giving their opinions, I still actively seek out their views and feedback. We want to hear the good and the bad...

Learning priorities

ComReg recognises that human resource development is a key element in the organisation's success and appreciates that excellent performance will only be achieved through continuing commitment and investment in staff. A key priority is the continued development and reinforcement of a knowledge-sharing culture, which provides the platform for mature prioritisation and decision-making, and the ongoing investment in a highly motivated team with clearly defined goals and objectives and a focus on timely delivery. Another priority is the continued emphasis on CPD, in particular working closely with specific professional bodies to ensure the staff members understand their obligations in this regard.

Finally, a key priority is to implement recommendations arising out of the action learning project undertaken in ComReg, as part of the NCPP/FÁS initiative. The objective of this project was to examine how to introduce e-learning to maximise learning for both the individual and the organisation. Recommendations were made at a strategic and operational level and the successful implementation of these recommendations will be measured over the next 12 months.

COMREG Introducing e-learning

A pilot project was conducted in 2004 to investigate e-learning as a learning tool and to determine how it can be most effectively used by the organisation and its staff to maximise learning.

The pilot took place over a six-month period with approximately 25 per cent of all staff involved from each division. The majority of staff on the pilot had non-technical backgrounds, but technical staff were represented too in order to both verify the quality of the e-learning material as well as contribute some insight to the findings from the non-technical staff. Questionnaires were distributed at three stages throughout the pilot; at the start, mid-way and at the end.

The e-learning pilot project found that e-learning is a useful tool for training staff, but only if it is combined with other training and development methods. For e-learning to be implemented successfully, staff must be aware of the time commitment and the degree of self-discipline and direction required. E-learning is more successful if sessions are facilitated for staff, with an expert available to answer queries as individuals go through the course material. There is more buy-in and commitment from staff to e-learning if they are involved in decisions on the type of material chosen for this type of learning.

Arising from these findings, a number of strategic and operational recommendations were put forward for the future.

- Create a *learning organisation* environment, to develop and encourage the ability to think and learn, both independently and collaboratively.
- Use the term 'learning and development' to encourage staff to think beyond training as simply courses they must attend.
- Increase the amount of funding provided to individuals for CPD. This will help staff realise that new knowledge acquisition is an important, ongoing part of professional development.
- Staff should take *partial* rather than total control of their own learning. This will mean that staff will not feel abandoned and will recognise the support available.
- Introduce e-learning as part of a *blended learning* approach.

The objective now is to ensure that as part of the well-established performance review and personal development planning processes, managers and individual staff members agree a development plan which may include some e-learning. Progress by individuals will be monitored by HR to determine usage and completion of e-learning courses, which will form the basis of a quantifiable measurement of results one year from now.

5

The Mespil Hotel

Organisational profile

Lee Hotels is a family owned group of modern hotels in prime locations. The Mespil Hotel is one of the three Lee hotels in Ireland with the Sligo Park Hotel in Sligo and the Kenmare Bay Hotel in Kerry. The Mespil located in Dublin is a popular hotel with the company, making a satisfactory profit last year. It has 98 employees with a ratio of male to female staff at 40:60.

The Mespil Hotel has a learning policy which contains the training and development plan for each department, individual managers and supervisors. This was introduced as part of the Best Service Excellence Award, which is part of the European quality mark accredited by Excellence Ireland. It focuses on practices and procedures and as a result the hotel progressed in this respect, as the MD explains:

The practices and procedures are the learning ... they are the things that back up the learning in the hotel. The manual at the front desk guides the receptionists as to what they have to do, so they need to learn the best practice procedures in order to ensure we fit into whatever category.

The training plan that had existed previously focused on mandatory training, whereas this new training plan focuses on staff development. This award, according to the MD, is generally a customer satisfaction vehicle:

It benchmarks certain practices that have to go on. We are audited on these once a year and that has been an incentive to us, management, heads of department and to the staff to keep themselves informed on how they do things and to make sure they do them properly. It has been a help to us in keeping a learning process in place.

With regard to the learning budget, the specific budget is decided by the management annually and confirmed by the board of directors. This budget covers a multitude of things within the learning remit. The salaries of those involved in training and development are not accounted for in this budget so, as the MD states, the budget may not reflect the full cost of training and development in the hotel. Each employee receives approximately 4–5 days training per annum and this has increased in line with best practice over the past 12 months.

Key drivers for learning

Learning is deemed to be of high importance in the Mespil Hotel. Management believes customer satisfaction and best practice are best achieved by employees who are well trained and competent in their jobs. It is further believed that competence leads to greater job satisfaction and reduces staff turnover. In light of this, it personally develops every employee and the attitude is 'what can we do to develop this person'. There is an acceptance that training is part of the day-to-day job where everyone is involved from the general manager to the kitchen porter.

Both the manager and the individual departments in the organisation decide what learning is required, although learning is influenced by a number of key factors. The most influential factors in driving learning is to secure and/or retain quality standards, facilitate product innovation and development, and finally to improve cost efficiencies. Meeting these drivers, it is hoped to develop the reputation of Lee Hotels as a recognised hotel group and learning organisation.

Some departments appear to embrace learning more than others. This is considered to be mainly due to the level of enthusiasm of the department head. However, all of the heads of department are considered to be very involved in managing the learning process, as the MD reflects:

We are lucky we have good heads (of departments) and they have taken to the learning initiatives quite well. In departments where there is a training person who is not necessarily head of department, we have support there for someone who is maybe weak on training but good operationally The key thing is to have the right people at the top. If the head of department is enthusiastic the others follow and it works.

Training and learning activities are scheduled into the two-week rota but there is a realisation that some level of flexibility is required for this to work within the hotel business, as the HR manager comments:

You have to give and take — I know fairly well what is going on in the operation, busy times and not — I am quite flexible and they would be quite flexible as well. I would always try and reschedule it because if it has to be done it has to be done. Generally, two weeks notice before a training event works well.

In addition, there is support for staff if they want to go back to college to expand their learning. There are always opportunities for employees to learn from the variety of tasks that they are given. The corporate sales executive comments:

I have been working in the hotel business for the past 14 years and this is the first hotel (in my experience) to invest in staff in terms of process and practice guidelines, training, opportunities to go back to college and six-month feedback chat on what the employee needs.

Learning activities

Training, learning and development needs are identified on a formal basis through:

- Performance appraisal
- Personal development plans (PDP)
- Organisational training needs analysis.

The organisational training needs analysis is conducted departmentally through task analysis, which is also used as part of the staff induction, as the bar/restaurant supervisor explains:

For day-to-day operational training needs the onus is on you (the supervisor) to have task analysis sheets signed-off. They (employees) won't learn if they don't have an open attitude and it is up to us (supervisors) to facilitate learning and provide the opportunity to learn.

The PDP results from the performance appraisal process with the employees taking responsibility for following up on what is agreed at the appraisal. But the MD comments that this may need to become more structured:

Our PDP is a bit scattered we are doing courses with people but we are not asking the individual 'what do you need career wise over the next three years?' A more focused approach would assist persons in the formulation of a career development programme.

Other methods used to identify training needs are:

- Observation
- Feedback from customer comment cards
- Learning to avoid making the same mistake again.

In addition, another method used to identify training needs is learning from competitors, as one member of the focus group reflects:

Every six weeks we choose somewhere for coffee and see how our competitors do it. If we see something we think will work in our environment then we adapt and implement it.

The focus group members consider learning to be anything from training and development to third level courses, to day-to-day learning on the job and learning from experience. The majority of learning activity is informal on the job. Only 35 per cent of learning happens on a formal basis (20 per cent of that on the job). The Mespil Hotel has a number of learning activities available as outlined in the table below with the percentage of employees involved in these activities listed.

Learning activities	Percentage of participating employees in past 12 month (%)
Externally accredited programmes	18
Coaching	10
Project teams	19
Conferences/seminars	12
Short courses	20
Visits to sister companies and networking forums	6

Learning and continuous improvement is supported through structured, consistent and homogeneous training programmes. The use of handbooks and induction programmes are also deemed to be of great benefit in getting to grips with the job and the environment.

All of the participants in the focus group appreciate that recognition, feedback, comment cards and suggestions help to promote learning and they also act as motivational tools:

They might not always facilitate learning but they do encourage it. If there is specific recognition on the comment card it motivates you.

There is a team-based approach to work in the Mespil Hotel. Fear of letting colleagues down appears to be more of an incentive to learning than fear of discipline. However, sometimes client pressure prevents learning from occurring as the following comments from the focus group illustrate:

It is very difficult to train when guests are arriving; this can be a very pressurised situation, after all you want to train properly You need someone to help you. There is a lot of weight and importance attached to statutory training such as manual handling ... other training and learning needs should be pursued as aggressively.

There is a formal induction process which is conducted over a period of three days with a job-chat feedback after three weeks. This involves the completion of a simple questionnaire and a discussion on any concerns that the employee or manager may have. This process is considered to be vital, particularly in this industry, as the product is the interaction with the customer. Without a proper and complete induction process new employees would be pitched in at the deep end and this would impact on the service to the customer.

Evaluation and return on investment

Learning is evaluated through both formal and informal feedback from employees. In addition, evaluation is also carried out using the total number of training days undertaken, measured job performance immediately after learning and measured job performance some months after learning.

Upon completion of a short course, employees are required to write a brief report. As the MD states:

It doesn't matter if it's a page or two pages or three points – it is about developing the discipline of report writing.

The MD considers it to be vital that the hotel becomes more focused on the reasons why people are going on courses and clarify learning objectives in advance:

We have come along way – we started off five or six years ago and to get an employee to go on a course was an achievement regardless of what the course was.

Now, however, the hotel can afford to be more selective about what it wants its employees to learn and how it relates to the overall business strategy of the hotel.

Follow-up training is considered important in terms of ensuring that there is value added. If the information gained is not used it will be lost. If the information is not lost, then the Mespil is not losing its investment in learning activities. Added value from investment in learning is determined through customer comments and staff efficiency, in addition to accreditation success.

What is the method we are using for evaluation? We want to do things that are going to relate back to improving the service to the customer.

However, this is not scientifically evaluated. According to the MD while he cannot prove that there is a return on investment in learning, he is strongly of the view that standards, customer satisfaction, retention and staff morale are positively influenced. The fact that the Mespil Hotel has passed Ireland's Best Service Excellence standard over two consecutive years and going for a third year is ample evidence of that.

Only about 25 hotels in Ireland have achieved Ireland's Best Service Excellence Award– that in my view is sufficient proof that our learning processes or training processes are working. Customer comments and staff efficiency are all part of the assessment for the Ireland's Best Service Excellence Award. The accreditation process is rigorous. The reward would be worthless if it were not – they get down to the nitty gritty.

Learning priorities

The Mespil Hotel is facing the challenge, like so many businesses in the hospitality sector, of increasing business and improving bottom line. This is mainly due to the experience of the past number of years: SARS, BSE, terrorism and war, and a weakened dollar against the euro. It has, however, developed a strong culture of learning and development. This is attributed to the involvement in the Ireland's Service Excellence Award and the best practice accreditation.

We have embarked on the Ireland's Best Service Excellence standard with the expressed objective to improve our efficiency, our professionalism – that is what it is about. It is not because we want a certificate on the wall. In my mind it is quite deliberate and that is why we are doing it ... to make us better business, to increase our market share, to protect our bottom line, to enhance our reputation, to satisfy customer, and so on.

While this learning culture exists in the Mespil, it is important that all learning is used efficiently within the organisation:

We have become a place where there is a learning culture, we probably waste half of the learning.... I don't know how much we waste and we need to focus on it, be more productive and, I keep coming back to it, we need to focus

on efficiency, professionalism and customer service.

While the MD agrees that training is very important, he acknowledges that demonstrating and putting it into practice is a great deal more difficult as no one can make employees learn. The ultimate goal, he concedes, is to create a learning culture.

MESPIL HOTEL Achieving Ireland's Best Service Excellence Award

We set out to achieve the Best Service Excellence Award, which is a three-year process, whereby business processes are looked at within the company under the topics of leadership, strategy and management, operations management, people management, and marketing, finance and ICT. The processes and procedures in place are benchmarked on an ongoing basis against best practice in industry.

We wanted to create a culture and environment where learning is a comfortable or normal part of people's daily experience. We appointed a best practice co-ordinator, and five committees each with a team leader. Each committee includes employees from various departments and levels. They meet once per fortnight to set out action plans and desired outcomes. Outcomes are monitored and measured through setting targets, devising action plans and reviewing and analysing the action plans.

The impact of the project has been tremendous and here are just a few examples of the results achieved:

- The marketing, finance and ICT committee created an IT program which has enabled us to analyse and produce monthly reports on our customer feedback. The program has helped us to learn to be more proactive as opposed to reactive in terms of customer expectations.
- The operations management team has created a very successful environmental policy for the hotel. We have introduced a complete recycling system for food, plastic, paper and cardboard.

All employees were introduced to this new system and way of thinking within the hotel. The entire procedure was a learning process for both management and employees and we are currently investigating any further improvements that can be made.

- One of the most evident results since undertaking the award has been the improvement of communication throughout the hotel. When the people management committee completed an employee satisfaction survey, it became quite evident that communication within the organisation needed to improve. This has since happened. Various changes have taken place and continue to do so, such as departmental bulletin boards, monthly staff briefings, and minutes of fortnightly management meetings are communicated to and signed off by all employees.

The project has added value to the learning in our organisation and continues to do so in many ways. As an organisation we are now more focused by having continuous achievable targets to aim for and achieve, which add to the overall success of the daily operation.

Our most important learning point to date has been the importance of good teamwork, the importance of involving all employees in the project from the outset and the benefits of effective communication throughout the organisation. It has encouraged us to step outside our comfort zone by challenging ourselves to set goals, and in turn has given us added job satisfaction by achieving those goals quite successfully.

6

Jurys Doyle Hotel Group

Organisational profile

Jurys Doyle Hotel Group has emerged from the merger of the former Jurys Hotel Group and Doyle Hotel Group in 1999. The origins of both groups go back to the early 1960s. Today, Jurys Doyle Hotel Group, Ireland's largest hotel group, is a market leader in the Irish hotel sector with an established presence in international markets. Jurys Doyle employs approximately 4,200 employees over 36 properties throughout the UK, Ireland and USA. The growth strategy of the company is to develop and expand across a number of emerging markets including Jurys Inn Brighton, Jurys Inn Liverpool, Jurys Inn Plymouth and Jurys Inn Milton Keynes.

Jurys Doyle Hotel Group has a company-wide learning policy, which outlines some of the training and development programmes that are available to employees as well as the communication and feedback mechanisms that are in place with regards to learning. Training is a HR function and responsibility

for training lies with a number of people within the HR Department including the group training and development manager, the group training executives (UK and Ireland), and the personnel and training managers in each of the group's properties. Training is also the responsibility of key members of staff who have been recognised and nominated to act as team trainers. Each property has a number of team trainers, usually frontline department supervisors, who help to implement the training plans that are developed annually. On average each employee receives 4.5 days of formal training per year. While the dedicated budget for learning is decided by corporate head office for all sites, the HR projects manager explains:

Each property has its own local budget but if an unexpected training requirement is identified and it can be justified, then we can allocate additional resources for them. This tends to be the case in the smaller properties where they may have smaller budgets.

The budget for training and development falls under the general HR budget, and formal training activities account for a significant amount of the total budget because it is generally the greatest cost to the department. Due to the fact that the Group HR Department supports all training, the budget is determined by a number of properties and respective employee numbers. It is then the responsibility of each property to use the services of head office and get the best value for money.

We encourage individual properties to recognise what has been contributed to the budget for training and to try and get the most value that they can from the training being provided.

Key drivers for learning

Learning is highly prioritised across the Jurys Doyle Hotel Group. The organisation believes that learning encourages employee development and results in a high standard of employee performance within a pressurised service environment. While learning is highly prioritised within the organisation, it is recognised that some employees place a higher priority on it than others. This is true particularly for those employees who are interested in moving jobs, transferring between hotels and/or who are seeking promotion. There are, however, other employees who value learning in the organisation to reinforce their knowledge and skills in relation to their current role and responsibilities:

There are employees in Jurys Doyle Hotel Group who have 35 years' and more experience who still gladly attend supervisory training courses and still find value in the training courses as they feel that they grow in confidence as a result of the learning – they know that what they are doing is right.

However, there are other employees who appear to be more interested in a job for life and perhaps do not see how learning fits into the greater scheme of things as the HR executive explains:

There are a number of long-serving employees in the hotels that are not too interested in participating in training. Their attitude would be that they have been doing this for 20 plus years and that they already know how to treat their customers.

The HR projects manager feels that a good deal of influence on how learning is received and perceived within the organisation depends on the general manager and how committed s/he is to HR as a function. The site general manager is very influential in this regard:

More recently established hotels, in particular, really embrace training and that is why we have it down to 15-minute training sessions (these are task-specific training sessions, e.g. how to make a bed, etc.)

There are three key factors that drive the Jurys Doyle Hotel Group to continue to place a lot of emphasis on learning within the company, namely:

- A strong culture of learning helps to attract good employees which, in turn, helps retain quality standards in order to deliver exceptional customer service
- The organisation recognises they must provide opportunities for learning in order to meet employees' needs and demands for learning
- Having a policy of learning helps to ensure the company is also meeting statutory requirements for training, e.g. manual handling and food safety training and introducing new technology.

It is now widely recognised within the organisation that graduates want to join the company due to the variety of avenues and opportunities available to them. Graduates recognise that opportunities to learn and develop are what they need and that Jurys Doyle can provide them with these opportunities.

The company is very proud to offer these opportunities and to promote from within; it is also important that the organisation has employees who are good at their current job and who wish to stay in that job. Moreover, it is about finding a balance between those that are happy to learn their job and stay in that job and those who want to learn and who want to move on and develop a career path.

We need people who only want to go to a certain level within the company and who become exceedingly good at that level. These employees probably have much more potential

but they just don't want to move position. We need and value that employee as much as the person who wants to move up, up, up. It is having the balance that is important.

With regard to introducing new technology as a tool for learning (e-learning), Jurys Doyle Hotel Group has plans to investigate the potential of this approach but it is not the highest priority for learning at present. Nevertheless, it has been recognised that learning computer skills has boosted some employees' confidence levels and one staff member even commented that:

ECDL training increased my confidence as I feel I can develop in the Group and now as a result, I am more confident to go ahead and make that change.

Learning activities

The learning culture is regarded as very open throughout the organisation. The focus group considers two-way communication to be of vital importance in the promotion of learning, particularly in relation to new employees.

There must be two-way communication and problems must be dealt with at back of house never allowing a customer to see them. It is very important to support this communication across the organisation.

Learning needs are identified by the training/HR departments who have the annual training plans and budgets at a central level. However, line managers and employees can also request additional learning, development and training should it be required.

A number of methods are used to identify learning needs, including performance appraisals, personal development plans, organisational training needs analysis and also employee surveys. The responsibility for training and development is placed on the managers in the properties, with support from head office. However, the focus group sees the responsibility for learning as falling to the individual employee. This is true to an extent, although the supervisor is the one seen to be responsible for his/her own staff and for ensuring that they are trained to the organisational standard.

Learning is categorised as both formal 35 per cent (including on the job and off the job) and informal at 65 per cent (on the job), although these percentages can change depending on the specific position held. For example, most of the structured programmes are there for supervisors upwards. There is huge variation in the learning activities used within the organisation as can be seen in the table below.

Learning activity	Percentage of participating employees in 2003 (%)
Externally accredited programmes	3
Computer-based learning	20
Coaching	10
Mentoring	10
Action learning	40
Project teams	4
Video-based learning	40
Conferences/seminars	1
Distance learning	1
E-learning	1
Short courses	40
Visits to sister companies	2
Networking forums	4-6
HR forums	40

Employees comment on the huge variety of learning activities within the company and also refer to the use of posters and signboards, opportunities to learn languages and computers, individual induction and the weekly departmental training and assessments.

Evaluation and return on investment

Learning activities are evaluated using both formal and informal feedback from employees and line managers. Feedback is then fed from the individual sites back to the Group Office. Evaluation of the learning activities also occurs by analysing the overall number of training days, clarifying if the training met the objectives set out in training and development plans and the training needs analysis – recording examination ‘pass’ rates for certified or accredited courses that the company is sponsoring, measuring job performance within four weeks of training, and evaluating if there is an overall improvement in the ‘promotability’ of employees.

Pre- and post-evaluation forms are completed for all external programmes. However, feedback that is general or vague is not usually followed up. Some members of the focus group expressed dissatisfaction on the level of feedback, interest and encouragement from managers when it comes to advising them on how they are progressing on an external course. They made comments such as:

Some managers didn't even know what the training was about ... only one manager asked about the course.

Management knew that we had participated in a team-building course but we received no feedback about the impact of the course in our work ...

There is added value from training when an improvement in job performance can be identified and when employees are completing all tasks to the standard required, but it is difficult to measure this value or put a figure on it. As the HR projects manager reflects:

We probably can't prove that we are getting value for money but it is up to us as a company to try and identify the improvements and recognise the value of training.

Members of the focus group consider the benefits and value of learning in the following insightful comments:

- Job and personal satisfaction
- There is support for new employees to help them with any problems
- People get really good job satisfaction particularly when a customer's feedback lets us know of our progress and that we are doing a good job
- Many people have worked here and are both capable and confident enough to run their own companies, e.g. restaurants
- Pride in your job
- Confidence in dealing with the public because you are trained to a high level
- Confidence to make a change in my work, to take on new roles and responsibilities
- Heightened profile of hotel and high standards
- Repeat customers.

Customers also remark on the level of training and development within the organisation in terms of how it impacts on the level of employee turnover and service standards:

Although we have a lot of employee turnover, customers can still find a familiar face.

A friendly face is very important and customers often comment on how friendly the staff are.

Learning priorities

The Jurys Doyle Hotel Group has experienced a great deal of restructuring as a result of mergers, new building projects and refurbishments in 2001. This organisation has an excellent reputation with prospective employees. Some of this is due to the established links with colleges, guest lectures and arranging for academics to visit the properties, some due to the company's reputation, and for a vast range of other reasons.

With regard to continued learning, there is constant debate between industry and academia on whether recent graduates are prepared for the industry on completion of their relevant programme. While both theory and practice are important from the organisation's perspective, it is important that the academics are kept informed of recent developments within the industry and vice versa. In order to aid the transition from academia to practice the organisation tries to bring lecturers to the industry for a

weekend so they get first-hand knowledge of where their students will be going:

We bring the academics for a weekend and expose them to different departments relating to their areas of expertise. They stay in that department for a half-day and see and experience what's going on and how things work.... They would obviously have the academic knowledge and this gives them the opportunity to ask lots of questions on how it is being applied.

JURYS DOYLE HOTEL GROUP Enhancing interpersonal skills

We have always placed a significant emphasis on training and with such diversity of staff we set out to examine the role of the supervisor and determine how their personal competencies, if developed, could play a big part in retaining both employees and customers.

The main competence that we focused on, and one that affects employees the most, is communication. We believe that the behaviour of supervisors is crucial to the transfer and maintenance of social competencies. The supervisors' approach to colleagues is central to the well-being, retention and development of new employees just as much as that of managers, who tend to be more mobile within the industry.

We wanted to provide a learning programme for supervisors that would promote awareness of the diversity and interconnectedness of groups and how problems can be addressed. We hoped to enable them to develop the knowledge, skills and insight necessary to be effective supervisors.

We worked with Skillnets to provide a course in team building, which included sessions on team working and groups; communication skills; group dynamics; problem solving; work organisation. The duration was six days: two days per month over

three months. This was a certified programme requiring each participant to submit a project.

One of the major results to emerge from the project was the willingness to learn, and we found the group factor made a difference. The course caused a stir and the training department has been asked on several occasions by employees when another similar course would take place.

On a separate project we now have 22 team trainers with another eight waiting to be trained. The project has highlighted the importance of on-the-job learning and how crucial the method of imparting this knowledge is. The hospitality industry is changing and employees need on-the-job training, fast and effectively. The learning process depends on effective exchange of information and the attitude and interpersonal skills of supervisors, managers and team trainers.

Looking ahead, the main learning points for us are the importance of team work, flexibility, knowledge and communication. It is essential that learning is relevant and followed up with coaching. We fully recognise that the ability that distinguishes the outstanding supervisor is not technical, but rather interpersonal and how they relate to people.

7

Dara Creative Communications

Organisational profile

Dara Creative Communications is a multidisciplinary graphic design company which was established in Dublin 10 years ago. It is a privately owned limited company and is a member of the Graphic Design Business Association (GDBA) which works with clients across all industries. It is based on working with four key elements, namely research, strategic thinking, creativity and project management. It employs 12 full-time staff and two directors, with staff forecast to increase to 14 by year-end. Sixty per cent of staff are female.

Dara Creative does not have a formal learning policy or a specific budget for learning. However, there is a general awareness within the organisation that all employees need training, learning and development but that these are driven by time

due to the size and nature of the organisation, as one of the directors reflects:

This policy formulation is part and parcel of an overall strategic plan. It will come in now.... Like most other small businesses it is driven by time, having the time to sit down and do something about it, look at what the best policy is and actually put someone in charge of making sure it keeps happening. It just hasn't happened. We need to do it and we are in the process of looking at roles and responsibilities.

Nevertheless, while the management team regard a learning policy as a key priority for the year forward, they recognise that it would not necessarily improve staff retention as the business itself is regarded as quite 'fickle' and people leave for other reasons:

This industry is notorious for people moving around. It is a fickle industry with all due respect to the designers. Our biggest problem is no matter how much training we give, people walk for different reasons; money, perception of creative company or they prefer the type of work that other companies do – for example some companies do more advertising. So we don't see this as a problem.

The directors decide what is to be spent on learning per annum, although this only accounts for actual training costs.

There are other things (costs) like people going out to printers for a few days – it is how you evaluate costs – that was time – do you equate that with time?

On average, each employee receives two days formal training per year although this is supplemented by employees having time to learn systems, evaluate new initiatives and working through manuals. Making time for learning is a key issue for this small company due to the fact that every month certain costs must be met and business must increase and in the short term this is much more urgent. However, the company is making progress on this. Both directors rotate the various learning or networking events so as to ensure that the company is up-to-date on all of the latest initiatives within the industry. Management admit that members of the design team embrace learning more than other groups. They reflect that this is possibly due to the fact that they, as directors, don't make time for learning as targets need to be driven, and indeed, met.

Key drivers of learning

Learning is regarded as high priority within the organisation and the Operations and Head of Studio decide learning requirements. The three main influences on the type of learning undertaken are to:

- Drive profit
- Update existing skills
- Introduce new technology.

All of these influences are linked in terms of cause and effect in so far as profit is increased through learning new systems, understanding how other companies are doing it and ensuring that the organisation has up-to-date technology. There is a great deal of investment in new systems and new programmes and, as a result, learning occurs on the job and through getting to grips with the technology.

There appears to be an open culture of learning and communication within Dara Creative with staff taking responsibility for their own learning, although a structure for learning can assist in this: as the operations manager comments:

It is difficult to forecast what we need to learn because of constant technological and market changes – it is difficult to plan and arrangements for learning are ad hoc.

It is recognised within the organisation that learning from each other and learning from successes is very important, although the director feels that more of this needs to happen:

Learning from people needs a climate of openness and trust. You can see the tangible benefits. Being healthy in terms of people, procedures, atmosphere and clients, helps spread news of us and that is good for relationships which helps the bottom line.

While it is difficult to create space for learning within such a small company the attempt is made to schedule some learning intervention during a time when an employee has a quiet period. External courses are generally no longer than two days' duration due to business pressures.

Commercial requirements – time is billed so there is no time to do research, assess things ... there is a focus on doing and not enough focus on learning. Everyone has a desire to learn...

Learning activities

Learning needs are formally identified through organisational training needs analysis and through the ongoing dialogue with staff. The operations manager and the senior designer are responsible for identifying training needs within the studio. The company also uses regular meetings with staff members to assess their training needs. Due to the fact that Dara Creative is a small company there are project reviews at the start of the year in terms of how projects or processes can be improved. There appears to be quite an open atmosphere and culture within the company resulting in ongoing communication, as this comment from the MD shows:

Organisational TNA – may be perceived as an organised procedure for talking or a natural consequence, which I firmly believe it is. The fact that we are a small company, we talk to each other all the time. We are in and out of each other's areas, we all have reasons to crossover and the things we need and what we need to do about it becomes quite obvious.

The majority of learning occurs on the job with approximately 15 per cent of learning considered to be formal off-the-job learning. Due to the nature and variety of the work, learning is continuous in terms of learning new ways to do things and to complete projects. The learning events or activities are outlined below with a percentage of employees who have been involved in the event in the past 12 months.

However, a number of other activities are associated with learning, according to the employees:

- Meetings
- Reading trade magazines
- Internal communication and talking to others
- By making mistakes
- By just doing the job
- Coffee breaks.

Learning activity	Percentage of participating employees (%)
Externally accredited programmes	50
Computer-based training	100
Mentoring	20
Conferences/seminars	70
Strategic company alliances	30
Visits to customer or supplier sites	30
Project teams	100

Learning evaluation and return on investment

Learning activities are not formally evaluated although there is informal feedback from employees. Employees will offer feedback on the course progress and more importantly decide whether or not they would recommend it for anyone else in the team. However, due to the fact that most of the courses that people attend are to fill a skill gap within the organisation, it is evident afterwards whether or not the person has benefited from the course. The improved job performance after training is quite observable in this instance and so the director feels that this is sufficient:

Improved project timeframes and not having to buy in the skill are measures that we use to assess the return on investment... not formally measured but recognised through job performance and upskilling.

The focus group feel that the learning that occurs in the organisation is not recognised in a formal way unless it is something extraordinary. However, management regard some flexibility in working hours as a more important way of recognising performance:

We might give time off if someone is going away for a week; we tell them to go at 12 o'clock. Little things like that in a small company count for a lot.

Management are quite generous at Christmas and Easter in relation to allocating paid holidays. Nevertheless, a formal structured evaluation system is needed, but its absence is due to the lack of a defined training plan and a person to take responsibility for same. Management recognise how they have developed as an organisation and will build evaluation into this process:

We still haven't got, as an organisation, our roles and responsibilities sorted out and pinned them down. Hopefully, sorting this out will be part and parcel of the evaluation process down the line. This is not a major priority. We are better now than we were six months ago in recognising people's abilities and planning how we will go forward. We are actually going through a learning process all of the time.

Employees, on the other hand, regard the added value of learning to be vast. Among the key comments were involvement, progress, increase in motivation, self-confidence and sense of achievement. One comment from the focus group is quite telling:

The net result is that every aspect of the company improves. It can be measured in terms of finance, morale, time, incredible environment to work in, not a chore to come to work ... not all about money.

Learning priorities

Dara Creative is a very progressive young company with a very open culture:

There are no staff members in the company that are apathetic to learning. We all know there are bits and pieces that we need to learn and in our own way we all do it. In some cases we learn unknowns to ourselves and we learn because of the type of people that we are.

It is evident that while learning is a key factor for their business, two key challenges prevail: first, time must be allowed for the process and, second, a structure for learning must be developed.

With respect to the time factor the main concern for the company is the nature of the business – it is very reactive in nature in terms of managing and responding to client requests. This makes it difficult to plan ahead. However, a Skillnet programme has been agreed for all members of staff in association with the GDBA, which will help in prioritising learning and indeed making time for learning.

Dara Creative has also prioritised the development of a training policy and accompanying procedures from the strategic plan. Within this structure there is a need for a formal induction programme as none currently exists. A proper induction programme is considered crucial for a new employee in terms of reducing staff turnover.

There isn't a major induction programme and it is a problem, as that's when people decide whether they will stay with the company or not. I would love them to have a day in the studio, a day with myself, I would like to send them out to the printers for two days – sometimes it happens and sometimes it doesn't.

DARA CREATIVE COMMUNICATIONS Learning to change

As a small business, making a firm commitment to learning and training can be difficult. SMEs more than most recognise the inherent value in their people. Being small, we have to depend upon each other in order to drive the business forward and become successful. Highly trained, knowledgeable, fully committed and happy staff can often become the company's 'competitive advantage' in the highly competitive marketplace that is Ireland today.

So, how do we achieve the right balance in terms of time and cost to facilitate learning whilst ensuring we remain competitive and profitable? In order to drive the business forward and make it successful and profitable, we needed to understand more fully all aspects of learning in the workplace. Only then could we begin to make decisions and choices that would have major implications for both the business itself and the people who work in it.

We wanted to achieve a profitable company, improved creative quality, motivated staff and standardised structures/systems of working. Since the start of 2004, the process of improvement has been well under way. To date there have been a number of successes and failures with the implementation, along with a number of additional benefits and issues that need to be addressed.

Overall the first six months of the change process has been broadly successful, with ongoing profitability, improving levels of design and more upbeat staff. The main success of the project to date has been the recording of a profit for Q1, Q2 and Q3 of

2004, versus a loss the year before. This has proved that the improvement in processes and financial management has had direct and speedy results. Creative quality has also been improved considerably, as many projects now involve a team of staff working together, improving the quality and innovation of the concepts.

The learning network project proved invaluable – a major forum to explore all aspects of learning in the workplace. It provided a platform for everyone to share and benefit from other's experiences, good and bad. It gave me invaluable 'Do's' and 'Don'ts' in how best to implement and manage this function within our own organisation.

It also made me realise that whilst we were small in terms of size, we too had a lot to offer the group. Our learning had to be different. It was not centred round highly structured course/classroom environments, nor was it driven by trainers, industry experts or consultants and large budgets.

Our learning was based on teamwork – we learned from each other 'on the job'. The basis of our learning was 'communication' between people and an understanding that everyone had a contribution to make, large or small.

In conclusion, the programme confirmed my belief that in order to continue our development, remain competitive and profitable, we need to place learning in the workplace at the forefront of our business objectives.



National Learning Network

Organisational profile

The National Learning Network (formerly called NTDI) is Ireland's largest non-government training organisation with more than 50 purpose-built training and employment units nationwide catering for over 4,500 students each year.

The overriding objective of the National Learning Network (NLN) is to assist people at a disadvantage in the labour market to learn the skills they need to build lasting careers in jobs that reflect their interests and abilities. This is achieved through a brand of training, education, employment access and enterprise development that is respected and often replicated across Europe. Within Ireland these services have already enabled more than 20,000 people — many of whom had never previously been employed — to join the workforce in careers as diverse as catering and information technology.

The NLN employs 650 people with this number reflecting an increase in recent times due mainly

to the increase in the number of trainees. The majority of employees are female (73%). NLN has a formal learning policy that provides for all staff in the organisation. In line with this the organisation has a specific budget for learning decided by the senior management team in consultation with the training and HR department. Each employee receives an average of five days learning/training. However, this figure was rising in the 12 months prior to writing this report.

Key drivers for learning

Learning is accorded high priority within the organisation as demonstrated by its recent Excellence Through People accreditation. A number of key decision-makers are involved in deciding what learning is required within the NLN, namely:

- The training/HR department
- Individual departments within the organisation

- Individual employees through their performance development form
- Line managers
- The senior management team.

The three key drivers of learning are to:

- Create a shared vision of the organisation
- Update or add to existing skills
- Improve performance.

However, a key element of the organisation's strategic plan is to ensure that half of the training centres (25) will be accredited with the Excellence Through People Award within 12 months. This will be driven by the training manager with the HR officers taking some responsibility, as the training manager explains:

People have been very involved in strategic planning and developing the mission statement during the last couple of years.

While the organisation's strategy drives the training and development plan, issues that arise during focus group sessions and from training courses run in previous years is also considered during the planning. The training manager works closely with the programme development officers who facilitate regular feedback. While there is a positive culture of learning prevalent within the NLN and while learning is embraced across all regions, the degree to which learning is valued and managed is dependent on the management style at local level:

Sometimes when you try to influence or bring in something new, you will find there will be some region that will say 'no problem, we will do it'... It is down to the personality of the general manager of the region who may be very open and doesn't see a problem or issue with it, or it could be down to one of the staff who may be negative or unsure of something.

According to the training manager because informal learning on the job is not monitored or recorded, there needs to be a greater value attached to it. One regional programme officer commented that the value attached to informal learning can be 'personality driven'.

Learning activities

Learning needs are formally identified in NLN through the staff development review. However, strategic planning meetings also contribute to the identification of training needs. In addition, the HR manager meets with all of the general managers every year to discuss the training plan, to get their input and to listen to what they have to say about learning needs in the organisation in general.

Training focus groups are convened quarterly to discuss training activities and to identify needs, as the training manager reflects:

The focus groups on training have been very useful in terms of evaluating training and what's happened ... just discussing it informally, getting their feedback and what they are feeling.

Personal development plans are also used to file a request for training. These requests are increasing all the time with a rise in the number of people requesting third-level courses for both primary and masters degrees. A staff development review is being introduced which will help people to prioritise and set their personal learning goals. It is planned to provide staff training on not only conducting the staff review but on what to expect as a reviewee. Members of staff were involved in designing the staff development review and training programme and were encouraged at all times to make suggestions and comments. It is hoped that all staff will have had their first review by the end of 2004.

Learning in NLN is regarded as predominantly formal in nature (80% formal on- and off-the-job learning; while informal learning on the job accounting for 20%). However, this may be due to the fact that formal learning is tracked while there is an obvious difficulty in tracking the informal learning, as this focus group comment indicates:

People are doing 'everyday learning' all the time.

The range of learning activities across the organisation include:

Learning activities

Externally accredited programmes

Computer-based learning

Coaching

Project teams

Conferences/seminars

Distance learning

Short courses

Networking partnerships within the organisation

While these activities fall under the more formal learning, staff regard learning on the job as more significant:

Formal learning is one bit of it, whereas learning on the job accounts for 80 per cent of the learning — if you find out about something or read about it somewhere, you ask your colleagues.

The staff regard learning on the job as crucial to improving performance. Learning on the job occurs through reflections, supervision, interacting with others and group work. It also occurs when incorporating off-the-job learning into the job, as explained by one programme development officer:

There is a huge amount of on-the-job learning – by learning what to ask and what not to ask. You learn what is not written down.

Evaluation and return on investment

Learning activities are evaluated within the organisation. There is an open loop of communication between line managers and employees in terms of running focus groups on training. Formal feedback is received from employees through the use of evaluation forms, which are completed immediately after the course and again three months later where employees complete a form on key areas, such as:

- How the training impacts on their job
- What people are doing in their job that they hadn't done previously

- Anything they are doing differently as a result of the training.

A report is then formulated and distributed to all participants and to the trainer. The learning activities are also evaluated in terms of meeting the objectives set out in the training and development plan. Other systems have been devised for evaluation arising from the ETP standard. These will be implemented during 2005.

NLN cannot scientifically prove that they are getting added value from investment in learning but the organisation's focus group quarterly meetings assist them in identifying and recognising improvements in performance, as the training manager explains:

The most difficult thing is finding the time ... but I think that when we have the staff development review process in place, that is where we could do it.

However, the NLN firmly believes that if needs are identified correctly then it proves much easier to evaluate the learning. Due to the fact that each learning event has very clear aims and objectives stated on the training registration form, these are the first items that are evaluated.

Learning priorities

The organisation's learning culture is very apparent to the staff within the NLN. It is extremely responsive to needs and provides practical and accessible training. There is a very open communication system within the organisation. People are recognised as very approachable, supportive and encouraging to newcomers.

The need to improve and provide additional structured support for the induction process has been identified by the organisation. This will help the new employee to 'find their feet'. During induction and the early phase in the job a lot of courses are provided for the newcomer, but still the initial period of the job remains daunting:

The first six months was terrifying and needs to be more supportive and concentrate on trainees – need clear objectives.

Instructor

There is quite a lot of academic-speak and we need a guide to ease passage of staff, as the use of (organisation specific) acronyms can be quite confusing.

Area Manager

Providing support is recognised as very important within the NLN. The focus group note that in order to build up a support network or to allow space for learning, a number of potential options exist:

- Informal meetings every six weeks
- The mix of formal and informal learning on training day which facilitates group work
- Social events.

However, for all of these suggestions, time is a concern and the reluctance of some managers to release staff for informal events when, in their view, so much time is already allocated to formal events.

NATIONAL LEARNING NETWORK Linking individual and organisational learning goals

During a consultation process with all staff in 2002/3, initiated by our chief executive, it was identified that a more systematic approach to assessing and building on staff's abilities and potential was needed. We wanted to introduce a review system, which would be forward-looking and would integrate organisational goals and objectives with career and personal aims and ambitions of individuals within the organisation.

We wanted a review system that would provide a means for managers to enhance their staff satisfaction and individual contribution to the achievements of the organisation's goals and objectives. We also wanted to encourage open and effective two-way channels of communication between managers and staff, and to identify development and training opportunities for staff.

A working group consisting of staff and union representatives met on a number of occasions during 2003 and drew up documentation and guidelines in relation to a staff development review process. The documentation and guidelines were based on research carried out by the working group members into best practice in the area of staff development/performance management reviews.

It was decided that in order to implement the staff development review process during 2004, there would need to be training for all reviewers and reviewees. It was also decided that the best people to give this training would be staff themselves. A two-day train the trainer programme was developed (with the help of consultants), using the documentation and guidelines drawn up by the

working group. Thirty staff members have recently received this two-day training and have begun the process of training reviewers and reviewees. The senior management team have also received reviewer training.

It has taken over 18 months for us to get this far with the introduction of a review system into the organisation. Many fears and anxieties have been expressed by staff and it has been therefore necessary to move slowly, to involve staff as much as possible in the development of the process and to ensure that it will be a safe, fair and motivating experience for all, both reviewers and reviewees alike. The idea of exchanging constructive feedback has been integrated as key to the review process.

In the process of implementing this approach, we have learned that:

Participating in a review meeting is not easy for either the reviewer or the reviewee. Adequate time must be given for preparation and for conducting the review. Managers need to ensure that the review meeting is a positive and motivating experience for staff. There should be no surprises.

The giving and receiving of feedback should be an informal day-to-day activity and not confined to a formal review meeting.

The training of inhouse facilitators who are responsible for the training of reviewers and reviewees has proved very successful. It has created 'champions' of the staff development review process in the organisation as well as giving staff the necessary facilitation skills.

9

TLEI*

Organisational profile

TLEI is a progressive university with over 14,500 students. The university has a current enrolment of over 12,000 degree candidates with an additional 2,500 students enrolled in postgraduate courses. TLEI's widely diverse student body includes over 1,000 international students representing more than 60 countries worldwide. The university's internal research reputation spans all of its faculties where it offers over 120 degree and professional programmes through seven schools and 27 departments.

The University employs 2,712, including full-time and part-time employees. The percentage of male to female employees is 48 per cent male to 52 per cent female.

The university is managed on a committee structure and the governing body is responsible for the formal learning policy. The responsibility for implementing the learning policy, however, lies with the HR committee which meets on a regular basis. Each department has its own HR budget and each department manager has discretion to dispense their budget in different ways including training. The HR department provides a budget of 3–5 per cent of payroll to support training and development in the organisation, as the HR manager explains:

Certainly, we would be below the IBEC level in terms of spend but it depends on how you calculate it. Training in the traditional pedagogic sense is probably less resourced than we would like, but we have identified as one of our challenges in the university to begin to explore other informal opportunities for learning that are in existence, and to formally manage those learning opportunities.

*Not the organisation's real name

On average support staff receive 1.4 days training per annum. However, it is quite difficult to determine the average number of days for academic staff due to the variety of learning events that exist. For example, sabbatical leave would increase the average to a huge extent.

Key drivers for learning

Learning is regarded as high priority within TLEI as employee development is clearly identified in the strategic plan. A staff survey in the university was conducted in 2000, which examined such issues as communication, structure, processes and training issues. This assisted in the formation of many initiatives, including the formalisation of the training policy and developing different structures, as the HR manager reflects:

The survey provided a lot of feedback in terms of processes and helped us to understand some of the issues that emerged.... We used it basically to inform the organisation's strategy and HRM.

The three main drivers influencing the type of learning undertaken in TLEI are to:

- Facilitate the implementation of change
- Improve performance
- Meet statutory requirements
(in particular the 1997 University Act).

However, all of these three influences are interlinked as change is a regular feature within TLEI, particularly in response to changes in legislation:

The 1997 legislation has had an enormous impact and, particularly coming from that, the creation of executive deans or mini units for the faculty, the emphasis on accountability and transparency, and value for money is permeating all public service.... Legislation also impacted on the role of president which has become more like that of a chief executive with a different set of responsibilities – publishing a strategic plan, quality assurance and initiatives that focus on continuing development inherent in which is change.

Some sections welcome and embrace learning more than others and the HR manager surmises that this may be the result of climate, budget constraints, or people's understanding and expectations of training. Anecdotal evidence suggests that some managers are slower to release budgets for training than others. It may, however, be a result of the amount of time people engage with the HR/training department, also:

HR along with the head of department organise training activities, but we seem to get the same people who participate all the time.

Learning activities

Learning needs are identified through a training needs analysis which is completed on an annual basis but the method used varies annually. It could take the form of a departmental training needs analysis, which is facilitated by HR or an organisational wide survey – or indeed a combination of both. The training plan is subsequently published from the TNA but training would also be provided on an ad-hoc basis in order to respond to unexpected developments. Ultimately, training is provided to support the individual roles and responsibilities.

It is envisaged that a performance management and development system will be introduced in line with the broader public service, and a pilot is already underway in the university.

While informal learning on the job is not recorded formally there is an expectation that this is happening as part of every job within the university. Formal on-the-job training is provided as is required. There is a huge variety of learning activities used in TLEI, including the following:

Learning events
Externally accredited education programmes
Computer-based learning
Coaching
Mentoring
Action learning
Project teams
Video-based learning
Conferences/seminars
Distance learning
E-learning
Short courses
Strategic/company alliances
Visits to head office/sister companies
Visits to customer/supplier sites
Networking forums
Career breaks
Study leave
Research

While there is no formal record for each learning event, approximately 63 per cent of staff have been involved in one or more of the activities listed above. The biggest challenge for the university seems to be in relation to communicating to all of the various learning opportunities that are available to employees. The university also recognises one of its challenges as exploring the various learning opportunities that exist and to formally manage these:

We are moving away from the pedagogical more to the androgical type or styles of learning or trying to encourage both really... We need to move people to an understanding that this is learning and this is development. On-the-job training is not traditionally associated with this sector and we need to develop it – develop people’s understanding of training and learning in all its forms.

Evaluation and return on investment

Learning activities are evaluated through a number of methods. Informal feedback from line managers occurs through personal relationships and through the department heads forum. While formal feedback is provided by line managers through the training needs analysis process, partnership groups and committees, it is also sought from employees at the end of a course and through follow-up questionnaires after three months.

With regard to the three-month follow-up questionnaire ... we compile the results and evaluate based on what people are saying. We also follow up with individuals if there is a problem emerging. These results are used to identify ongoing needs.

Informal feedback from employees is often given by the individual participants too.

An academic council committee on staff development and enhancement organises teaching and learning workshops throughout the year.

Two years ago, they initiated an awards scheme — I don’t have empirical evidence to suggest it but certainly the quality of the entrants are having an impact in terms of the portfolios that they are now putting forward.

In relation to evaluation and return on investment, the HR manager admits that it is very difficult to make an absolute link between training and improved performance and suggests that the staff survey may be a useful tool for this purpose going forward:

We carried out a survey on attitudes in the organisation ... we included some specific questions on training which identified very clearly that employees wanted change in the type of training that was being provided. There is no plan at the moment but we could at some stage re-run that survey to see if there has been any change...

However, a number of metrics are used for evaluation purposes including the following:

- The number of training days undertaken

- Meeting the objectives of the training and development plan
- Exam pass rates for accredited/certified programmes.

Learning priorities

While there are 2,712 people on the payroll, there are 5,000 people paid every month. There is a huge number of part-time or occasional staff that contribute to the organisation and the HR manager feels that this contribution needs to be recognised in some way.

TLEI Enhancing communication through peer consultation

This project set out to increase communication within the department and to enable managers to improve group performance through the provision of reflective space. Where peers work together for mutual benefit it is referred to as 'peer supervision' or 'peer consultation'. Peer consultation may be described as a process in which critical feedback is emphasised while evaluation is de-emphasised. In other words, it is a space where peers come together to support one another in their roles and as people.

In terms of process, each member of the group outlined their concerns at the outset and an agenda was set. Time slots of three hours were allocated which would give enough time for detailed discussion and feedback as well as planning. Within that, space was allocated to each group member. As a result what was reviewed could be determined and owned by each individual.

Much progress has been achieved. Clearer understanding of each other's roles has been established, including an appreciation of the pressures and circumstances of each area. It has also provided mutual support for learning and provided a forum to debate issues and attempt possible solutions.

Peer group consultation has provided an opportunity for individuals who had felt isolated to engage with colleagues in providing mutual support. It has enabled insights and new perspectives on operational issues. For the members of the group it has contributed to more collaborative and productive relationships. It has increased self-confidence, self-direction and communications skills. It has also initiated the development of closer links with members committing to regular informal meetings, thus developing more supportive working relationships. It has provided a valuable forum for colleagues to share knowledge and to get access to new knowledge from others.

This type of intervention has many possibilities within the organisation and could be used to support the development of other groups. From the experience of the pilot group it is clear that benefits to the organisation would include:

- Improved quality of work and better performance
- Development of shared supportive organisation culture.

10

The Courts Service

Organisational profile

The Courts Service was established in November 1999 as a result of the enactment of the Courts Service Act 1998. The core functions of the Courts Service are to manage the courts and provide information about the court system to the public, to provide, manage and maintain court buildings, provide support services to the judges and to provide facilities for users of the courts. The Courts Service in Ireland is responsible for the District Court, Circuit Court, High Court and Supreme Court and employs 1,034 people, with 65 per cent of the staff female. It is forecast that the staff will decrease marginally over the next two years due to government requirements for cutbacks. There are 42 District Court offices, 25 Circuit Court offices outside Dublin, with other offices located in 12 different locations within Dublin. There are also a number of specialised offices attached to the head office.

There is a formal learning policy within the service which focuses on training, development and further education for all grades which was developed through consultation across all levels. It is very much strategic in nature and is consistent with the HR policy and, through partnership with individual managers, strives to ensure that it has value added to the business of the organisation. The HR director explains the policy:

It is based on a key principle ... being that if we are to bring the entire organisation forward then there must be a training programme for everybody within the organisation. It is not something that is to be optional for people who are willing and interested or whose domestic circumstances allow it or anything of that nature, but we need a structured approach.

However, the organisation is in the process of developing a structured HR strategy using a number of internal key studies. These studies illustrate that the Courts Service is ahead of public/private benchmarks, which is very positive but, conversely, could have negative implications in the future:

...that we could end up seeking to address any shortfalls has been identified and I know that in 18 months in the second staff survey, we will go down rather than up – I mean that is major.

There is a specific budget for learning which is decided by the training and HR department in consultation with the senior management team. This budget is managed at head office but devolution of budgets is anticipated going forward as structures and processes are developed. Staff receive on average 2–3 days training per annum. However, a new initiative is being explored which would provide two days training for everyone on an ongoing basis so that all staff would have a structured training programme ranging from managing change to various issues related to the organisation. This is further elaborated by the HR director:

The objective is that it will be consistent and work with the individual manager in terms of structure, process and preparation and everything that has to be there from the time someone comes in. They have been made aware of what will be happening but we haven't got it in place yet. It will be there from the beginning of the year.

The key challenge for the Courts Service is to develop a common culture throughout the organisation. At present there are a number of variations and cultures across areas due to the widespread locations of the various offices. The recent staff survey, which was quite extensive, revealed that there seems to be a mixed perception of learning as the HR director reflects:

The quality of training is regarded as quite good but some employees have reservations about on-the-job learning — staff are quite positive about it but managers regard it as an imposition in relation to staffing.

However, the focus group considers the learning culture of the Courts Service as very progressive with an increasing number of training opportunities available. For the most part, staff appear to welcome the opportunity to learn and their overriding concern is the relevance of the course and their availability to attend:

You need to get away — nothing should get in the way of training.

Key drivers for learning

Learning is highly prioritised within the Courts Service. Improving performance is cited as the first most influential factor in determining the learning activities that take place, followed by the introduction of new technology and finally, facilitating the implementation of change. While there are clearly identifiable areas that embrace learning more than others, the HR director recognises that the manager is the key influence on how learning is regarded and perceived:

An individual manager who is farsighted knows that in order for the area to function well, he needs to work well with the team, and various key stakeholders.... If there is anything in the business plan they are doing it. On the other hand, if another area is poorly managed, it caused us to intervene; in the course of intervening we have saved souls and managed to turn them around. Poor management reflects itself in the whole organisation.

It is estimated that approximately 30 per cent of managers have embraced learning enthusiastically, 50 per cent do it mechanically and another 20 per cent are reluctant to do it. This is not acceptable from the HR director's viewpoint:

My concern is not just the managers but their staff. They are managing staff that are not going to fare as well as staff in other areas who have the opportunity to develop ... they have never been encouraged and it has huge impact in terms of performance and ultimately we are a service organisation and it is going to impact on the people coming in.... I am willing to be very hard on offices this year and next year

with the expectation that it will be sufficiently embedded and I will have to do nothing.... It is critical to have support at CEO level and I do. He is willing to lead out any initiative.

The focus group reiterate this view in their comments that the benefits of learning depended very much on the manager in the various offices.

From a managerial perspective, the key responsibility for on-the-job training lies with the manager and this must be reflected in the individual departmental business plans. Conversely, the focus group consider three main parties responsible for learning, namely the individual, the manager and the trainer. It was also recognised that the individual must take responsibility for learning but that the manager has a role in encouraging learning, particularly if there is an anxiety or fear associated with it. With respect to potential barriers to learning, the focus group regard lack of freedom to give feedback, timing of the course, staff availability, lack of opportunity to put learning into practice as key issues which may pose difficulties. On the other hand, the focus group consider the following as factors which enable learning to occur: planning, recognition and praise, night courses, practical courses with varied training methods, and freedom to attend courses without interruption from supervisor.

Learning activities

Learning needs are centrally determined using training needs analysis which is based on the competency related to a particular grade. A series of workshops, with managers and a range of different levels, are run to facilitate training needs identification for the individuals but also identifying needs of managers and highlighting other particular needs of staff. The performance management and development system (PMDS) also has a vital role to play in identifying needs going forward in addition to the staff survey, and input from the various levels in relation to what is actually needed.

Staff consider the PMDS as the key to identifying learning needs, although how this is regarded depends on the manager, as some managers appear to regard the PMDS as a paper trail.

The learning activity is broken down into formal on-the-job learning at 80 per cent and formal off-the-job learning at 20 per cent. Taking this into consideration the following formal learning activities occur in the Courts Service:

Learning activity	Percentage of participating employees in past 12 months (%)
Externally accredited programmes	5
Computer-based learning	90
Project teams	23
Internal conferences/seminars	40
External	8
Short courses	100
Networking forums	20

In light of the various learning activities that exist in the Courts Service, the focus group consider that both the theoretical and the practical learning are important for the job:

Formal courses are theoretical and not specific to a job but learning in the office is different. You could do a four-day course but never get to put it into practice as it is so busy.

Evaluation and return on investment

Learning activities are evaluated in the Courts Service through formal feedback from employees. These are generally reactive questionnaires completed after the training event which are reviewed afterwards, with any negative comments being discussed with the trainer/facilitator. Although one manager stated that:

There is a sense of achievement when people are trained and I make sure I ask him how he is getting on and I always feel a sense of success.

Other metrics are used, including the total number of training days undertaken, meeting objectives set out in the T&D plan and meeting objectives set out in the individual training needs analysis. Informal feedback from managers gives an insight into whether there is return on investment in learning. However, this is unstructured in nature. The staff survey would also assist in evaluating this return on investment.

Improved confidence and personal development is cited as one of the key benefits of learning by the employees and that ‘anything extra is a bonus’. Other benefits cited include:

- Increased assertiveness
- Good for CV and promotion
- Increased involvement and more interested in job
- Enhances skills and allows for sharing of experiences
- Incentive to pilot new knowledge.

Learning priorities

Due to the nature of the Courts Service, when people are hired it is in the capacity of a particular grade, not in terms of a particular job/function. Currently, there is no induction programme in the Courts Service which leads to difficulties for new staff:

I worked on my own in the Children’s Court office and was dealing with the public ... it was a complete disaster. I hadn’t a clue what I was doing as there should have been someone there. You could be put anywhere. It is a sink or swim scenario — you could be a typist and handed a pen.

However, this is a priority for the HR department and it is envisaged that new employees will receive all relevant information before they begin working in the organisation. This will be regarded as their starting point and a structured induction programme would then be in place when they start and would run over three or four weeks.

It emerged from the focus group that further invaluable insight would be gained through an information tour of the courts which would allow staff to witness how the system operates:

You need to get into court to get an insight – a general picture and it would be nice to get more knowledge on what happens next. Sometimes we don’t know where it goes next ... we wouldn’t have to query as much.

Job rotation is considered to be a very important tool in the Courts Service both for experience and for personal development. However, rotation should take the employee to a new area not to an area s/he worked in previously, as one comment reflects:

I got more knowledge in moving around and as a result there is better knowledge for customers.

On the other hand, one drawback of job rotation is that people may apply for a transfer to another area and this may result in a particular function losing a valuable well-trained member of staff, in whom a great deal of investment may have been made.

Principal officer would not allow transfer of two people due to the amount of money invested in training and courses — a lot of money had been invested.

A key challenge for the Courts Service is to focus on evaluation and measuring return on investment. While the main objective of learning activities is to improve performance, it is not evaluated on a formal structured basis:

If you use learning effectively within the organisation, you are hoping that this will improve performance although you can’t prove it yet. Traditionally, offices were evaluated on the number of cases processed but this was not reliable in so far as cases varied in complexity and so it was not a fair system.

Cross-training staff is another key initiative for the Courts Service to enable increased mobility between District and Circuit offices. This has been agreed, in principle, with staff and it is operating on a pilot site at present.

THE COURTS SERVICE Developing a learning strategy

This project set out to examine and review the training and development function, to review the effectiveness of the training and development initiatives undertaken over the past four years, and to develop a strategy for the future.

The key issues explored were:

- The quality and quantity of the training delivered
- The relevance of this training to daily activities
- The responsiveness of T&D to the needs of the organisation
- The current and future training needs of the organisation
- The key responsibilities for the effectiveness of this training.
- Greater focus on customer service improvement
- Greater focus on areas such as teamwork, stress management, personal effectiveness/time management and interfacing skills such as influencing others, interviewing skills and leadership of change
- Better balance between formal and informal training
- Joint responsibility between individuals, line managers and T&D for the effectiveness of training
- Better use of training plans plus agreed processes for ensuring that the learning is implemented in the workplace
- Provision of a panel of skilled trainers and coaches who can assist managers and staff with implementation of the learning
- Courses designed to assist managers and staff in achieving their goals of making the organisation more effective, more efficient and more focused on delivering a world-class quality service.

We gathered and analysed data from a wide range of sources, including course evaluations, focus groups, surveys, and measured progress against the guiding principles set out in the 2000–2004 strategy documents, training & development (T&D) plans, report on the Review of Business Planning and PMDS systems Feb 2004, and personal interviews.

On the basis of our extensive research and analysis, we have outlined the directions we want the T&D centre to take and indicated the strategic areas where we want to focus our energy and resources for the next three years. The major themes for the future are:

- Widespread use of induction courses
- On-the-job training geared specifically to training needs and time pressure needs of departments

We have developed the following new mission for the T&D centre for 2004—2007:

To build on past progress to create a centre which supports and facilitates staff who are informed, knowledgeable, dynamic, creative, motivated, embrace change and are focused on delivering a quality service.

11

Filestores

Organisational profile

Filestores is part of the Irish-owned Document Management Group (DMG) and operates in the document and data management services sector. Established in 1989, Filestores has experienced sustained growth and development over the last number of years. It was the first document management company to obtain ISO 9002, ISO 15489 and the FÁS Excellence Through People Award. Specifically, over the past 18 months or so, the company has grown organically and increased staff, capacity, storage and its customer base. A recent merger also resulted in significant reorganisation and relocation to a central site.

A HR/training department is currently being established but at the time of writing all HR-related activities report to the finance department. Key priorities for this HR/training department coalesce

around developing more effective systems for collecting and generating training information, and identifying learning requirements.

At present, there are 100 people employed by the company, of which approximately 60 per cent are male. The company has an expressed commitment to learning, training and development that is evidenced in its formal learning policy. An annual budget, totalling approximately 5 per cent of payroll costs, is set aside for learning, training and development. In practice this amounts to an average of about two days training per person per year. Learning/training priorities are broadly scoped out by the owner managers (DMG was originally founded by two partners who continue to take an active role in strategic planning and management within the company) and the board. These are then adapted and implemented by the department managers in association with HR.

Key drivers for learning

Learning is highly prioritised within Filestores and forms an important element of the company's five-year strategic plan. Three particular forces are seen to impact the company's requirement for learning, training and development, namely:

- New technology
- Performance improvement
- Product innovation and development.

The company is regarded as quite technology focused. Its computer system is upgraded at least twice yearly and this directly impacts most employees, thus prompting the need for constant skills upgrading and training. Performance improvement is a key organisational requirement for Filestores and the company is in the process of adapting and introducing a Balanced Scorecard system for DGM services. Metrics are currently being developed to support the system. The system will record training and performance indices such as complaints, quality, errors and so on. The HR practitioner acknowledges that linking training and performance is inherently problematic because there are always questions around quantifying the productive value of training, and this is a challenge that they must address over the next few months.

Learning and training are also linked with new product development and innovation. Here the HR practitioner suggests that increased learning and training should result in more effective performance, noting that:

People who are trained to an expert level to be innovative know what they are doing and they are not afraid to try things differently.

Learning activities

Learning is recognised as a necessary and valued organisational activity at Filestores. Here key stakeholders in the company identify two broad value outcomes of investment in work-based learning:

1. Improved personal competence associated with:

- Not being afraid to experiment with how to do a job
- Advancement or being more competent in personal life
- Improved motivation levels to better oneself
- Building confidence in own ability.

2. Improved professional competence as indicated by:

- Career advancement
- More highly skilled
- Broader range of experience
- Being generally more capable.

Learning and training are initially indexed in the strategic plan and flow through the company's formal learning policy. The HR practitioner indicates that the company is committed to employee development and to developing a strong internal labour market such that:

We take great interest and go to great lengths to develop our staff. We have tried up to now and will continue to develop from within where possible.

To facilitate the identification of individual and organisational learning needs and priorities, the company utilises a combination of the following:

- Performance appraisal
- 360-degree feedback
- Personal development plans
- Organisational training needs analysis.

These are further supplemented by formal quality system reports.

The company experienced some structural change which culminated in the relocation of three plants into one organisational unit. This resulted in a significant level of work alteration and job shifts across departments and systems and prompted the completion of an organisational profile analysis. Here, individuals were asked to identify their skills, abilities and job preferences and these were matched, where feasible, against available positions within the organisation.

Once a year a formal training review, which forms an integral part of the performance management/appraisal system, is completed for each employee and this is contextualised within prioritised individual departmental targets and requirements. Individual department managers are responsible for conducting performance appraisals for their reports and they jointly complete training reviews. This marks a departure from the previous year when the HR practitioner conducted the reviews himself. Not only has this freed up the HR role, but has resulted in making training and learning more relevant for everyone involved. The HR practitioner contends that this system is more effective since it is based on key departmental priorities and individual managers and supervisors within these departments are best placed to determine learning needs over the coming year. He recalls that in the past this was often a grey area such that:

There was a very obvious gap between me trying to talk to people and really understanding what they need.... It is not up to the training department to identify and provide skills – the department managers have to tell me what needs to be done and we can work from there.

At the time of writing there were plans to implement a formalised performance management process. This will mean that training and development needs in the future will be assessed on a quarterly basis.

Learning at Filestores is predominantly work or job based. Here, it is recognised that learning can and does occur in a variety of ways — formal and informal, planned and incidental. Thus, approximately 50 per cent of learning is reported to be formal on-the-job learning. A further 20 per cent of

learning activity is categorised as informal learning on-the-job, while the remaining 30 per cent is taken up with formal off-the-job learning/training. Interestingly, key stakeholders identified a wide range of experiential means through which people learn at work including:

- Learning by mistakes
- Learning through other people's mistakes
- Learning by example
- Peer learning (which was described as somewhat more personal and less political).

The HR practitioner notes that:

If you ask any operator 'how did you learn to do that', then they will tell you – on the job. They spend a week with somebody who shows them how to do it, and then they spend a few hours with another person. There is no sign-off for on-the-job training, i.e. there is no sign-off for informal training.

Formal learning off the job is described as post training. Such programmes or courses tend to have a pre-training and a post-training element to them. It is acknowledged that creating time and space for learning is problematic at times. Increasingly, time and effort is spent on scheduling formal learning events as they emerge from the training plan, to the extent that valuable informal learning can often be overlooked or become highly incidental. An example of visits to sister sites was used to illustrate that, while such visits are recognised as valuable learning opportunities for the individual involved, they are not pre-arranged as part of the training plan. Rather, it is left to the individual to 'get time to fit it in', whenever he/she can.

The company utilises a wide variety of learning media, many of which are targeted at specific groups or cohorts of employees as appropriate. It is recognised that individuals have specific learning priorities and preferences and so different types of learning suit different people. For this reason, many learning activities are accounted for within the organisation with the following percentage of employees being involved in these areas:

Learning activity/medium	Percentage of participating employees (%)
Externally accredited programmes	2
Computer-based learning	40
Coaching	40
Action learning	1
Project teams	5
Video-based learning	15
Conferences/seminars	10
Distance learning	1
E-learning	3
Short courses	3
Visits to sister companies	2

There is evidence of a changing focus for much of the learning that is currently being undertaken at the company. Discussions with the HR practitioner, and with focus group participants, suggest that the company is beginning to veer away from a prime focus on developing personal competences and heading more towards building organisational capability – concentrating more on developing specific organisational skills rather than general competencies. There are certain learning events that must occur, i.e. mandatory training on specific policies and procedures; most other learning is optional. While there is a desire to direct some individuals towards particular learning events, there is broad recognition that, outside of established required programmes, individuals themselves are best placed to choose their preferred options.

Learning evaluation and return on investment

Evaluation is recognised as an important, though complex, aspect of the learning cycle at Filestores. The company utilises a number of means of assessing whether learning needs are being met, and

whether the company is getting a valued return for its investment. Much of the feedback on learning and training tends to be collected informally from managers and participants. This is supplemented by more formal feedback from line managers and formal feedback from employees by way of evaluation forms that are completed one day after a course/session has ended. There is also evidence of some attempts to roll evaluation forward, such that some follow-up is completed two to three months later. The key indicators used for evaluating added value is improved quality and productivity, although this is not formally recorded and is therefore difficult to determine. There is a strong requirement now on managers to assess whether the learning/training provided for their employees is going to positively impact their department, and so clearly this tends to affect how learning needs and requirements are prioritised. The HR practitioner indicates that department managers and supervisors are now responsible for ensuring some productive benefit for expenditure so they tend to be asked whether ‘there is going to be genuine results out of this (learning)’.

Learning priorities

The company has experienced a number of important reorganisations over the past couple of years, resulting in a number of structural and procedural changes. Many of the new initiatives, including the establishment of a HR/training department and the relocation of responsibility for learning/training to line managers, are being enacted at time of writing and so will be a telling feature of learning and training in the company over the years ahead. Beyond these initiatives, managers continue to wrestle with the vexatious issue of how to motivate those who are not intrinsically motivated to learn at work. There is a view that particular categories of their employees are unwilling to participate in learning/training without some financial inducement. This situation is becoming untenable and has potential knock-on effects for the wider organisation. Comments from the focus group discussion are particularly telling here:

Some people will only be motivated by money but that's just the wrong way to motivate here. What is the point of giving training to people if they don't want it? It has a negative impact on others if they don't want to do it.

A further related issue for consideration for the company is how to improve participation rates for

learning/training programmes that have been agreed and organised. While work pressures will inevitably affect attendance for some individuals, it is felt that there needs to be a greater 'buy-in' by some participants. Here again, it is hoped that some of the reorganisation issues surrounding responsibility for learning/training will positively impact participation into the future.

FILESTORES Formulating an action plan for learning and development

We set out to build a working framework to improve the understanding among staff of the benefits of training, and better motivate staff to attend training. We wanted to identify motivators of training; determine why training has had poor take-up to date; identify the training that is considered important to the operatives; and demonstrate the link between training and performance.

Having held individual meetings with operations staff and issued a questionnaire to determine the best framework, we planned to develop a pilot training programme for operations staff based on the framework. However, it became obvious that our issues lay deeper than simply motivating employees. Although the culture bred interest in learning, the fast pace of the industry made it difficult to achieve the level of development that we had hoped for.

We conducted focus groups to look at the existing training department, employee needs and the senior management team. We then generated a 'Plan of Action' for the training department (and the organisation).

Listed below we have detailed the intended outcomes of our action plan. The process will take time to complete before we understand the true results of the research.

1. Sell learning to the organisation:
 - Devise a logo for the training department
 - Change the name from training department to learning and development department
 - Employees are to be viewed as customers

- We will conduct focus groups on an ad-hoc basis to understand 'what staff want' from learning/training.
2. Develop a sense of belonging:
 - Create a mission statement for the learning and development department.
 3. Highlight when learning initiatives work:
 - Develop a metric to measure effectiveness of learning/training, e.g. ROI
 - Skills matrix to be completed – this will identify areas in training.
 4. Make management responsible for learning:
 - After training happens a coach/mentor is assigned to help implement plan/learning acquired through training
 - Report to the board of directors and SMT in relation to the plan for training in 2005 – this will come from the business excellence department
 - Managers to act as coaches and work closely together following training to ensure productivity of employee is maximized
 - Training must be part of everyone's objectives (particularly managers for their teams) to ensure that there is buy-in.

We strongly believe this plan will bring us closer to the learning organisation we want to become.

12

GlaxoSmithKline Ireland

Organisational profile

GlaxoSmithKline Ireland was established in December 2000 as a result of the merger of two global pharmaceutical healthcare companies, Glaxo Wellcome and SmithKline Beecham. GlaxoSmithKline (GSK) employs over 1,400 people in both commercial and manufacturing operations. Two commercial operations covering prescription medicine and consumer healthcare products are based in Dublin, where 281 people are employed in the healthcare sales and commercial operation. The ratio of male to female employees stands at 45.2 per cent to 54.8 per cent.

The global learning policy focuses on one of the key behavioural essentials of GSK — to *develop self and others*. Due to the ever-changing business environment jobs are constantly changing and evolving. This has been underscored by the fact that the company has merged twice, reflecting a constant change process.

The organisation's learning budget, which is decided by the training and HR department, is 6 per cent of payroll covering all training costs. This has decreased in the past 12 months – due to the merger the previous year a huge amount of training took place in order to integrate two different companies and their corresponding systems. Training levels have returned to their status quo with each employee receiving an average of 33.5 hours training per year.

Key drivers for learning

Learning is highly prioritised in GSK with a number of stakeholders involved in deciding learning requirements:

- Head office
- Owner manager
- Board members/corporate HQ
- Training/HR department
- Individual departments within the company
- Employees
- Line managers.

While many factors influence learning, the three key factors identified in order of priority are:

- Improve performance
- Meet customer expectations
- Meet employee career needs/demands for learning.

Senior grades within the organisation appear to embrace learning more than others with training for lower grades decided on a more reactive basis, as the training manager comments:

Senior grades embrace learning more than others as it is linked to promotion, achieving a skill set that allows them to advance more in the organisation.... Some of the clerical people are happy in their roles and they will participate in a certain amount of training or development but they are content in their role. The more ambitious people are those that embrace learning.

Learning should not, however, be forced on people. One employee commented that:

Learning must happen by osmosis and must be free learning.

Learning activities

Learning needs are formally identified through performance management, personal development plans and staff surveys. However, the organisation's performance development plan is regarded as the most relevant method of identifying training needs with the company. It is a global system which is installed and available on all staff computers. This allows the staff to download relevant documentation and provides guidelines on PDP workshops. All new staff attend a workshop on PDP as part of their induction programme. The PDP process is both a bottom-up and top-down process linking individual training needs to key business priorities as identified by management:

Every year I ask the management team about their priorities for the coming year... increasing market share and sales by whatever..... We can achieve this by focusing on improving the selling skills of our reps; let's focus on improving their product knowledge, better access to our customers. These tend to be some of the initiatives that we work on. With PDP everyone is involved.

Staff surveys, while useful for identifying training needs, are regarded more as a temperature check. They are conducted by the HR department and are generally run within specific departments to survey skill sets relating to department in order to ascertain skill gaps. It is foreseen that a general staff survey will be conducted within the company by the end of 2004.

On-the-job learning accounts for approximately 80 per cent of the learning that occurs in GSK. According to the members of the focus group, informal learning occurs in GSK through feedback, talking to others, project work and task variety. One comment from the focus group differentiates between training and learning in an insightful way:

Training is done to you and learning is done by you.

However, taking into account that different styles of learning prevail in GSK, there are a wide number of learning activities available, as can be seen in the table below.

Learning activity/medium	Percentage of participating employees (%)
Externally accredited education programmes	5
Computer-based learning and distance learning	50
Coaching	1
Project teams	60
Conferences/seminars	45
E-learning	5
Short courses	70 – 80
Visits to head office/sister companies	20
Visits to customer/supplier sites	50
Networking forums	20
Other (please specify)	
Shadowing	For new recruits
Buddy system	For new recruits

All employees participate in a learning activity every year. The training manager regards the management of training and development via the PDP as a priority for all managers, not only for their staff but also for themselves.

Without exception everyone benefits from some (learning) intervention every year. I would follow up with a manager if I see nothing on his development plan. It's just not acceptable. I would expect at a minimum that they would have something on their development plan that would help them to do their job better or to develop themselves.

Evaluation and return on investment

Learning activities are evaluated using both formal and informal feedback from line managers and employees. Formal feedback is provided through the completion of course evaluation forms. This form comprises three sections: before, during and after the training. The first section focuses on training objectives, the second section on delivery and the final section on actions going forward. However, these are not yet linked to the PDP process but are used in reviewing the overall course and how the action plans have translated into the job.

The training manager also seeks out informal feedback in terms of how a course progressed and the key learning points after various learning events by following up with individual employees and their managers.

Twelve employees participated on a programme last week. I went around to every one of them asking how the training went and whether or not they would recommend it...

The individual training needs analysis is also used as a means of evaluation. The direct manager assumes this responsibility only when communicating negative feedback to the training manager in the event of negative feedback and/or performance. The number of days training is used as a metric for training evaluation, in addition to the exam pass rates.

An educational assistance programme exists and is in high demand with approximately three or four requests each month. This translates into approx. €5,000 for an employee to pursue a course outside of work. The programme requested must be of relevance to the organisation and is signed off by three parties – the line manager, department manager and training manager. A talent review assists in the decision, which is facilitated by the training department. The talent review identifies key people and future leaders in the business. In addition, employees must also provide a sound rationale as to why they wish to participate on courses and programmes:

... but on saying that, we tend to be quite generous in supporting most requests. Push back only takes place if the proper commitment to completing programmes is not evident ...

Evaluation in terms of return on investment in learning is difficult, especially in soft skill learning as the training manager explains:

We use Kirkpatrick's model on some programmes and Covey's seven habits on performance appraisal training. They are all tangible because someone will say at the end of the training 'you did a very good appraisal with me – and the skills are evident'.

However, other areas, for example training sales reps to increase sales, are a lot more tangible and easier to evaluate:

The best reps will get the best sales results; the best reps are the ones that are best trained, and who will invest in their product knowledge. It is quite easy to identify who they are. We provide a lot of training support programmes for the sales reps and we know the geographic areas where they work and their sales achievements — it is tangible. For others, I must admit, we provide a lot of training support programmes but we don't formally measure the outcomes. We know anecdotally that there are benefits; we can see changes in behaviour.

GSK also employs qualified doctors and pharmacists to answer queries from customers and internal auditors to assess the effectiveness of this sales service.

Learning priorities

GSK has gone through two major mergers in recent years and as a result has integrated twice with other organisational cultures. This requires employees to be flexible and to work in an ever-evolving environment. GSK has shifted its focus from training to learning and is deemed, by its employees, to be quite progressive in this respect. There is a learning culture that allows people to assume responsibility for their learning with support from management and the overall organisation.

While the organisation has a very structured training department and some interesting initiatives such as talent reviews, performance development planning, staff surveys, the organisation has two key learning priorities going forward.

Evaluation of return on investment in learning is a key concern for GSK. While this is done to a certain extent with bottom-up programmes, other more strategic events require more formal analysis.

In relation to linking the PDP to learning, a number of key concerns exist in relation to the annual review. The tool itself is considered to be quite labo-rious and not tailored to the Irish system. Some comments from the focus group are quite telling with a number focusing on how the process could be made more flexible, and that the form could be more user friendly. In addition, comments referred to how the PDP must be valued by all managers and at present appear to not regard it highly.

GSK Using e-learning for certified training

We have introduced product certification training through e-learning for the sales force, because research consistently highlights that customers value interaction with representatives who have high competence in disease areas and product knowledge. In addition, a new competency model being launched throughout Europe for GSK medical representatives requires demonstration of knowledge mastery on field re-certification tests. We needed therefore to set a benchmark for certification tests for all field representatives in Ireland.

We wanted all field force (50 representatives) to have certification tests completed in Q1 of 2005, to determine individual levels of disease/product area knowledge. We also wanted to pilot an e-learning management programme and to use product certification as the vehicle to launch this initiative.

We set up a project team with representation from the appropriate parties and set about planning for the launch of this initiative. We appointed two field trainers to work with representatives to achieve their learning objectives.

They will be involved in 'blended learning' initiatives, especially with people who find e-learning more challenging.

We presented our proposals to the 'representatives forum' to sell the benefits of this learning initiative to the representatives and how their learning improvements would lead to a 'win win' for the representative, the customer and GSK. We also involved GSK corporate learning to help with the introduction of the curriculum modules through the e-learning route.

We set up a pilot initiative to get representatives used to 'studying' using the e-learning route by having fun learning modules to get people used to this new approach.

The initiative is still in the developmental phase, with certification tests on all major promoted GSK products taking place in Q1 05. One major expected outcome is that as a company we have a benchmark that evaluates the level of knowledge attained by all our representatives now and on a yearly basis.

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Fáilte Ireland

Organisational profile

Fáilte Ireland, the National Tourism Development Authority, was established under the National Tourism Development Authority Act 2003, and subsumes the functions previously discharged by Bord Fáilte and CERT. The organisation has grown significantly over the past year to the extent that the numbers employed have risen from 90 to 270.

Fáilte Ireland provides strategic and practical support to develop and sustain Ireland as a high-quality and competitive tourist destination. Fáilte Ireland works in strategic partnership with tourism interests to support the industry in its efforts to be more competitive and more profitable and to help individual enterprises enhance their performance. Its strategic mission reads as follows:

To increase the contribution of tourism to the economy by facilitating the development of a competitive and profitable tourism industry.

Fáilte Ireland has a formal learning policy that is closely linked to the HR policy. The organisation has a specific budget for training, which is allocated by Group Human Resources in conjunction with the management team. Each employee receives approximately 5—8 days training per annum. The budget reflects the growth in staff numbers and this is entirely strategic in viewpoint. The issues described in this case study are primarily linked to the EFQM (European Foundation for Quality Management) project within CERT in 2003. Training and development is considered central to the management of change within Fáilte Ireland and, due to the merger, the staff numbers overall have increased. The head of enterprise and development reflects:

A critical factor in managing change is HRD and to manage change through developing people, building up personal and organisational capability...

Learning and development is regarded as a very positive phenomenon within Fáilte Ireland and reflects the culture of support for learning within the organisation and the organisation's developmental role within tourism.

The organisation is very flexible in terms of allowing time and space for learning as it is considered important on two levels – the organisational level and individual level. First, learning is viewed as important at the organisational level in terms of strategic needs and equipping staff for changes in the marketplace. Second, at individual level, learning is considered important in relation to personal development and capability building. Ultimately, learning is considered to have a role in meeting the organisational needs but also the needs of the client and the employee as the head of enterprise and development summarises:

There is a strategic, a client, and an employee need but also there is a belief among the management group that we need to invest in our people.

One of the positive outcomes of the organisation's commitment to learning, training and development is the low level of staff turnover. The head of enterprise and development attributes this to three main factors:

First, I would say we are good employers, second we are specialist employers and third when we did our benchmarking as part of the EFQM process, which was evaluated externally, there was generally a very high level of employee satisfaction.

Key drivers for learning

Learning is highly prioritised within Fáilte Ireland and all development is considered to be beneficial to the organisation. While individual departments within the organisation decide what learning is required, employees are responsible for identifying their individual needs. They are required to relate the potential benefit of their development in a particular area to their individual role, the organisation and to the strategic goals of the organisation. Three core needs are deemed to influence the type of learning that occurs:

1. To facilitate the implementation of change
2. To secure or retain quality standards, especially those determined by the EFQM process
3. To update existing skills.

Similar to all organisations today change is a regular feature within Fáilte Ireland, particularly the implementation of a new strategy as a result of a recent merger. This experience seems to be positive for Fáilte Ireland:

It has all been positive and there are great opportunities for all employees. However, we need to be able to cope with change, manage change, so therefore managing change is the whole focus of the organisation now.

The culture within the organisation is quite positive towards learning and the employees' main concern about learning interventions is in relation to how the learning can be transferred back to the job. There is also a strong concern about the need to link this learning back to the implementation of the organisation's overall strategy.

Learning activities

Learning needs are formally identified through three main sources of information:

- Personal development plans
- Organisational training needs analysis
- Staff survey, which was outsourced and conducted by an external agent.

PDPs are developed by the employees who take responsibility for their own learning within the organisation and so seem to be motivated to do so. The organisational training needs analysis is completed at strategic level, whereby job profiles are added to the annual organisational plan. This provides the context for the individual and their manager to have an informal review in order to identify, agree and prioritise their training needs. These discussions are documented and fed back into HR.

Learning activity in Fáilte Ireland is classified as 70 per cent formal on the job, 20 per cent formal off the job and 10 per cent informal learning on the job. The key activities undertaken are listed in the table below:

Learning activity	Percentage of participating employees in past 12 months (%)
Externally accredited programmes	8
Computer-based learning	70
Project teams	60
Short courses	55
Study tours to best practice organisations	2
Job rotation	5
Conferences/seminars	20
Distance learning	30
Networking forums	10

Evaluation and return on investment

Fáilte Ireland evaluates learning activities mainly through feedback from line managers and from employees in the formal appraisal process. However, opportunities and arrangements for sharing learning at work are given greater emphasis and are considered a more valuable tool for evaluation:

People who attend training activities are requested to share their learning and experience throughout the organisation. This is beneficial in two ways, first of all as an evaluation tool because sharing provides an opportunity to evaluate and secondly it highlights for the individuals concerned that they are accountable and have competence in that subject area. The main question for evaluation is what has the organisation got out of it?

The benefits of training are evaluated on the immediacy of the impact of the process. Therefore, employees are encouraged to complete training courses that are project based so that the material can be applied back to the job in question. For example, in relation to those employees completing master programmes, they are asked to base their project on the organisation so that the organisation can benefit from feedback. Evaluation tends to occur more frequently at peer level than at a managerial level. It is best described as informal feedback among employees and then feedback up to the manager. Documentation of feedback is not seen as the most important function. It is the actual feedback that is important and is regarded to be a key role of management.

In relation to how the organisation evaluates return on investment and value-added from learning, the head of enterprise and development regards it to be quite a subjective area and somewhat informal. He concludes that it tends to be a combination of personal and work-related benefits.

Learning priorities

The profile of employees within Fáilte Ireland who embrace learning more than others appears to be influenced by age, position and responsibilities, level of formal training and whether their position in the organisation deals with client demand. The key motivators within Fáilte Ireland in relation to learning are threefold:

- Personal motivation
- Organisational need
- Changes in the scope and nature of the role of the individual.

The nature of the business and its business needs are evolving on a regular basis and so needs are reviewed on a frequent basis.

